

The Coordinated Plan

2012-2016



One Region - One Network - One Plan

*The Regional Short-Range Transit Plan & Coordinated
Public Transit-Human Services Transportation Plan*

Final – July 2012



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The Coordinated Plan



Executive Summary

EXECUTIVE SUMMARY

The Coordinated Plan provides a five-year blueprint for the implementation of public transit and social service transportation concepts described in the long-range San Diego Association of Governments (SANDAG) 2050 Regional Transportation Plan (2050 RTP). The Coordinated Plan is unique in that it combines the regional requirement for a Short-Range Transit Plan with the federal requirement for a Coordinated Plan into one concise planning document. Additionally, the combination of transit and social service transportation provides an opportunity to evaluate all available transportation services in the region.

Along with the evaluation of transportation services, the Coordinated Plan establishes a unified regional strategy to provide transportation to the most sensitive population groups in the County, including seniors, individuals with disabilities, and persons with limited means, among other recognized transportation-disadvantaged population groups. While there is currently a range of transportation services available to these population groups, gaps in service remain due to geography, limitations in transit service, funding constraints, eligibility, knowledge, and training. However, the availability of funding programs specifically tied to the Coordinated Plan enables SANDAG to help put strategies into action to help meet the identified unmet transportation needs of these population groups.

BACKGROUND REQUIREMENTS

Through a provision in the federal Safe Accountable Flexible and Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), the Coordinated Plan must be developed and updated not less than once every four years. SAFETEA-LU requires that the Coordinated Plan include the following components:

- ▶ An assessment of current transportation services;
- ▶ An assessment of transportation needs for individuals with disabilities, older adults, and people with low incomes;
- ▶ Strategies to address the identified gaps between current services and needs;
- ▶ Priorities for implementation based on resources, time, and feasibility.

DETAILED PLAN OVERVIEW

A prominent theme of this year's plan is to further define the service parameters of the traditionally recognized transportation-disadvantaged populations. The plan not only helps to identify these populations but also works to address the specific travel needs of each group. While past plans have focused on a passenger-first perspective toward planning, this plan addresses a more holistic view of what services will meet the population's needs as a whole over the next five years. The following sections include a brief overview of the Coordinated Plan chapters.

Chapter 1—A Coordinated Vision

The introductory chapter describes the approach to the development and implementation of the Coordinated Plan. The chapter also identifies each of the formal regional, state, and federal requirements fulfilled by this Coordinated Plan.

Chapter 2—Community Outreach and Public Involvement

The 2012-2016 Coordinated Plan included an extensive community outreach program in both the urban and rural areas of the region, which also satisfies the federal requirements to ensure diverse public input in determining local transportation needs.

Chapter 3—Measuring Our Success

This chapter begins with an overview of the goals and policies of the 2050 RTP and how they have been refined and enhanced in this Coordinated Plan to evaluate the transit and social service transportation system. This is followed by the overall goals and objectives to guide the development of the transit and social service transportation systems over the next five years. Finally, since transit funding also is tied to state funding sources, a description of the state-mandated evaluation process also is included in this chapter.

Chapter 4—An Assessment of Public Transit and Specialized Transportation Needs

This chapter identifies the sub-populations that are important to understand for planning and operating effective transit and specialized transportation services. Newly available Census 2010 maps are included in this chapter to display the distribution of transportation-disadvantaged populations.

Chapter 5—An Inventory of Available Public Transit and Specialized Transportation Services

An index of the available public transit and specialized transportation services within the San Diego region is provided in this chapter. Research is drawn from the services offered by both Metropolitan Transit System and the North County Transit District, along with information gathered from SANDAG's 2012 Transportation Provider Survey.

Chapter 6—Strategies, Activities and Projects to Address Transportation Gaps

This chapter identifies gaps in transportation services and strategies to address those gaps. The analysis and identification of service gaps within San Diego is based on a compilation of sources ranging from a review of the Chapter 4 Census 2010 demographic data, from the availability of transit service, and survey outreach efforts of both transportation providers and passengers. The identification of service gaps, as well as



strategies to meet those gaps found in this chapter, sets the stage for the prioritization of strategies developed for Chapter 7.

Chapter 7—Priorities for Project Funding

Chapter 7 provides strategy prioritization so that SANDAG may continue to fund projects through the Job Access and Reverse Commute (JARC), New Freedom, and Senior Mini-Grant programs. The strategies in this section were developed to meet the regional transit and social service transportation needs as identified through the various outreach efforts, demographic research, survey efforts, and transportation inventory analysis completed over the last five years.

Chapter 8—Funding

The funding chapter describes the major sources of public transit and specialized transportation funds available from federal, state, and local sources. Currently, funds for transportation services are derived from a variety of public and private sources; however, this Coordinated Plan only addresses funds that are available, either in whole or in part, from public programs. The chapter also includes detailed tables noting the money distributed to date relating to the Coordinated Plan from the JARC, New Freedom, and Senior Mini-Grant programs.

Chapter 9—Implementation

The Implementation chapter explains how SANDAG will serve as a conduit for federal, state, and local funding of existing and future services recommended in this Coordinated Plan. Under current federal regulations, the Coordinated Plan enables the distribution of federal funding under the New Freedom (transportation for people with disabilities), JARC (commute transportation for individuals with limited means), and 5310 (seniors and persons with disabilities) programs. The Coordinated Plan also allows the distribution of local funding for projects targeted at seniors (through the Senior Mini-Grant program), which was created through the regional transportation sales tax measure (*TransNet*). The Program Management Plan (Appendix E) describes the procedures to be followed under the various grant program competitive processes and provides an overview of the monitoring and reporting requirements that follow project funding.

A Regional Service Implementation Plan (RSIP) also is included in this chapter to help ensure that annual transit operational changes are consistent with longer-range regional transportation goals included in the 2050 RTP. The RSIP also includes the identification of future services and needs to address regional priorities articulated in the 2050 RTP and enhanced in the Coordinated Plan.



The Coordinated Plan



Chapter 1



Introduction

CHAPTER 1: INTRODUCTION

The 2012-2016 Coordinated Plan represents the fifth edition, which is designed to implement the goals and policies articulated in the Regional Transportation Plan (RTP) and to fulfill federal requirements under the Safe, Accountable, Flexible, and Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) for Federal Fiscal Year 2012. It also has been prepared to accommodate changes in the federal requirements under the Moving Ahead for Progress in the 21st Century (MAP-21) for Federal Fiscal Year 2013 and beyond. The Coordinated Plan refines the RTP goals and in so doing, creates an implementation plan funded by local, state, and federal sources for transit and specialized transportation services. Being as the Coordinated Plan, in its capacity, is the short-range transit plan, the Coordinated Plan provides the framework for transit system development over the next five years and equally reflects the goals and direction for service development as described in the RTP. The Coordinated Plan involves the identification of transit needs from a passenger perspective and includes strategies to meet those needs. In years past, the Coordinated Plan has identified transportation disadvantaged populations; however, this edition of the plan builds upon past research to not only define these populations, but to further refine the distinct service parameters of each identified group. Additionally, the Coordinated Plan identifies a list of prioritized projects eligible for funding through specialized transportation grant programs.

A key highlight of the 2012-2016 Coordinated Plan is the inclusion of environmental justice, social equity, and Title VI issues as they relate to transit/social service transportation within the San Diego region. While the 2050 Regional Transportation Plan (2050 RTP) focused one chapter on Title VI, social equity and environmental justice, this plan will look to highlight the prevalence of these issues throughout the plan in order to highlight the importance of its inclusion in specialized transportation/transit planning. The plan establishes goals and objectives to yield an equitable level of transportation service for all populations as described in Title VI of the Civil Rights Act of 1964.

Using the newly released ten-year 2010 Census Data, as well as an updated transportation provider survey, this plan identifies areas of both need and opportunity for service. Further, the plan seeks to address transportation accessibility issues and assess potential improvements that impede the use of existing transportation services.

1.1 Envisioning a New Regional Plan

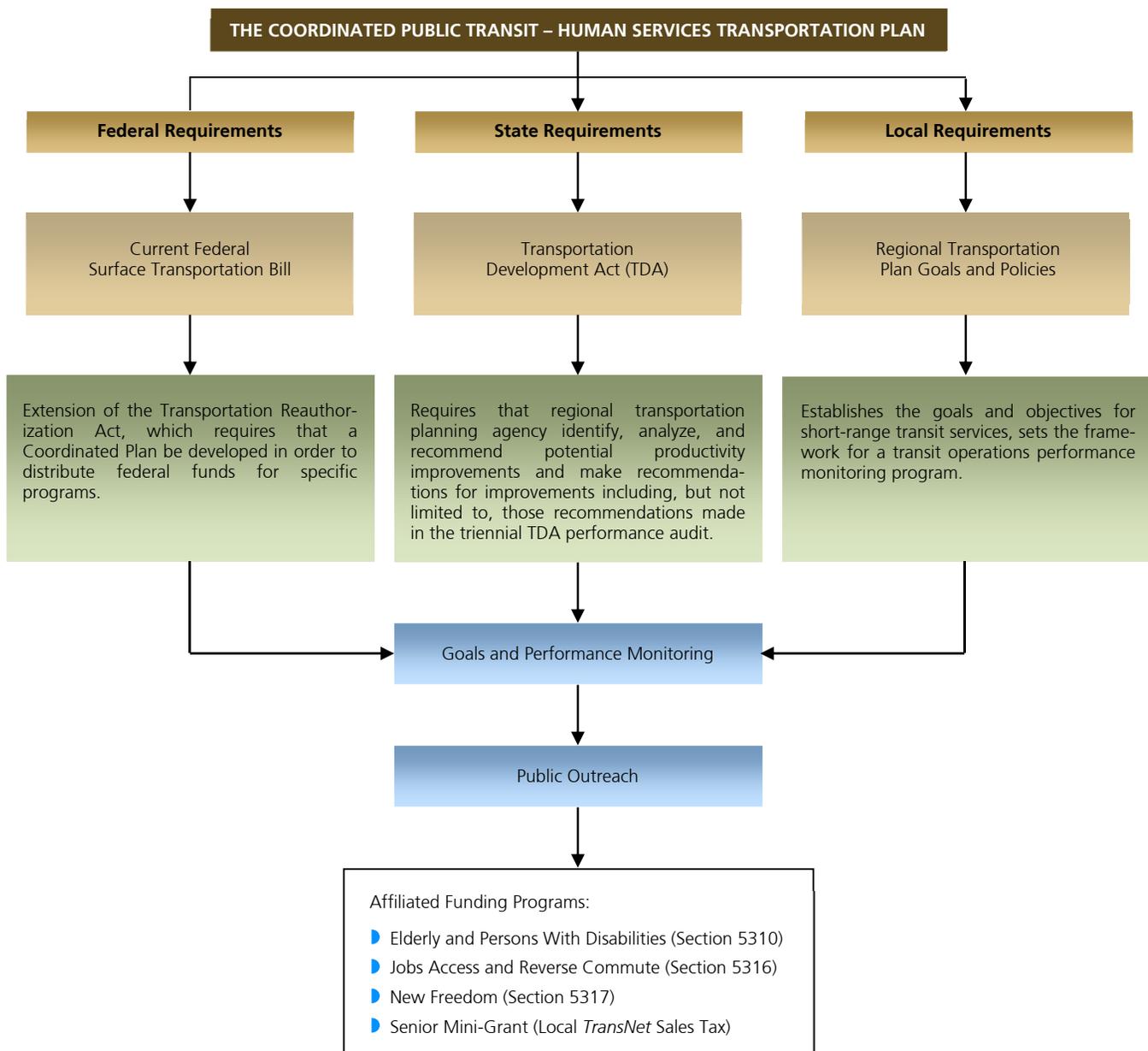
This Coordinated Plan rolls all publicly available transportation services into one unified plan, as required by federal legislation. The difference between previous Regional Short-Range Transit Plans (RSRTP) and the Coordinated Plan is that the Coordinated Plan includes transportation provided by social service transportation providers in addition to those services offered by traditional public transit operators. Social service transportation providers can include private companies, nonprofit organizations, regional transportation assistance programs, and governmental or quasi-governmental social service agencies. These services also are referenced as “specialized transportation” in this plan.

Given this broad approach, the Coordinated Plan envisions a new regional plan that identifies needs and opportunities to expand or improve upon the existing transportation service framework, collaborates with all transportation providers to remove inefficiencies caused by redundant or duplicative services, and addresses social equity, environmental justice, and Title VI issues pertaining to transportation. The Coordinated Plan seeks to improve transportation options for all populations by promoting coordination among agencies actively involved in transportation and encouraging innovative and cost effective solutions for a more seamless network of services in the San Diego region.

1.2 PLAN REQUIREMENTS

The Coordinated Plan also is a consolidation of mandates stemming from federal, state, and local guidelines which are described as follows, and shown graphically in Figure 1.1.

Figure 1.1: Coordinated Plan Requirements and Components



► Federal Requirements

SAFETEA-LU was signed into law by President Bush in 2005 and is the original Federal Transportation Act requiring the development of a Coordinated Plan. This approval of the current Transportation Reauthorization Act, MAP-21, maintained the requirement that funding for specialized transportation programs be derived from “a locally developed, Coordinated Public Transit-Human Services Transportation Plan” (Coordinated Plan). These federal programs are Job Access and Reverse Commute (JARC) (Section 5316), New Freedom (Section 5317), and Elderly and Persons with Disabilities (Section 5310), which have been designed to meet the transportation needs of individuals with limited means (JARC), people with disabilities (New Freedom), and older adults (Section 5310). Funding for these programs is available for Federal Fiscal Year 2012. The funding associated with MAP-21 will commence with Federal Fiscal Year 2013.

► State Requirements

The Transportation Development Act (TDA) of California provides one-quarter percent of the state sales tax for operating and capital support of public transportation systems and non-motorized transportation projects.

► Local Requirements

The San Diego Association of Governments (SANDAG) requires that a RS RTP be developed, which provides a five-year blueprint of how the transit concepts described in the RTP are to be implemented. The Coordinated Plan fulfills this requirement. The combined RS RTP and Coordinated Plan include:

- Goals and objectives for short range transit services;
- Definition of the existing transit system;
- Framework for a transit operations performance monitoring program as required by the TDA, and a monitoring program for social services transportation as defined by the Federal Transit Administration (FTA);
- Identification of service gaps and deficiencies;
- Evaluation of existing services and programs;
- Parameters for short-range (0-5 years) new and revised service development, as well as regionally significant and all other service adjustments;
- Methodology for evaluating proposals for new and revised service;
- Identification and prioritization of regional and subarea transit planning studies; and
- Evaluation and prioritization of new and revised services for implementation, including the adoption of an annual Regional Service Implementation Plan.

The Coordinated Plan also makes the distribution of local funding for senior programs possible (through the Senior Mini-Grant program), which was created through the ½ cent regional transactions and use tax extension measure (*TransNet II*). In order to enhance and promote coordination, all projects funded by the Senior Mini-Grant program also must be consistent with the Coordinated Plan.

1.3 A Passenger-Centered Approach

In addition to bringing public transit and specialized transportation under one planning umbrella, the Coordinated Plan represents a “passenger-centered” approach to finding transportation solutions for the region’s residents. Under this approach, the first step is to identify and define the mobility needs of the public and then determine the most appropriate solution, such as conventional fixed-route public transit, Americans with Disabilities Act paratransit, specialized transportation programs, or volunteer driver programs. This edition of the Coordinated Plan will go beyond past plan updates by refining the specific type of specialized service needed, based on the population group being served (for example, providing specific transportation for the developmentally-disabled senior versus the type of service a frail senior may require). This refinement allows for the development of service parameters specific to each population group.

In addition to addressing specialized transportation, the Coordinated Plan also includes an assessment of passengers who are considered to be discretionary riders (who have a personal vehicle available, but ride transit based on a personal preference). Planning for these riders represents significant transit expansion opportunities since these riders represent a potentially large, yet untapped, ridership base.

1.4 Performance Monitoring

The incorporation of social service transportation into public transportation planning represents new opportunities, including a chance to define public transportation policies and objectives for the region. The Coordinated Plan includes a series of goals and objectives by which the complete public transportation system will be measured in future years. The Coordinated Plan incorporates elements contained in previous RS RTPs relating to the transit agencies, but more clearly evaluates those transit services by specific location type (urban, suburban, and rural) along a five-year horizon. The methodology includes and expands upon the performance measures suggested in the California TDA evaluation processes.

1.5 Specific Populations and Plan Components

The Coordinated Plan focuses on the identification of specific population groups that are more likely to be dependent on public transit and specialized transportation. These groups, which have been federally mandated for inclusion in the Coordinated Plan, are:

1. **Older adults:** Includes, at a minimum, all persons 65 years of age or older.
2. **Individuals with disabilities:** Includes individuals who, because of illness, injury, age, congenital malfunction, or other incapacity or temporary or permanent disability (including an individual who is a wheelchair user or has semi-ambulatory capacity) cannot effectively use public transportation service or a public transportation facility, without special facilities, planning, or design.
3. **Persons with limited means:** Refers to an individual whose family income is at or below the 150 percent poverty line threshold set in JARC Federal Circular¹.

¹ SANDAG tracks poverty at both the 100 and 150 percent poverty line thresholds in order to understand all levels of poverty. Maps and analysis found in this plan will show the 150 percent poverty line which is based on SAFETEA-LU (per FTA C 9050.1).

In addition to identifying needs, the Coordinated Plan has been developed to respond to a transportation system that has grown to include a greater number of demand responsive services, potential opportunities for innovative technological enhancements, social service agency assistance programs, and cooperative arrangements. The Coordinated Plan includes the following elements “at a level consistent with available resources and the complexity of the local institutional environment” as required by the federal government:

- ▶ An inventory and assessment of available services that identifies current transportation providers from the public, private, and nonprofit sectors;
- ▶ An assessment of transportation needs for older adults, individuals with disabilities, and persons with limited means – this assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts and gaps in service;
- ▶ Strategies and/or activities to address identified gaps in service and achieve efficiencies in service delivery;
- ▶ Identification of coordination strategies to eliminate or reduce duplication in services and strategies for more efficient utilization of resources; and
- ▶ Priorities based on resources, time, and feasibility for implementing the specific strategies/activities identified.

In addition to identifying the types of populations most dependent on specialized transportation services, the 2012-2016 Coordinated Plan will also serve as a resource for specialized transportation programs and other affiliated organizations in helping to better serve their clients’ distinct needs. While the plan recognizes available services within the region, it will also call out innovative and resourceful programs that are, perhaps, not available presently within San Diego but may serve as a potential option to respond to the identified individual passenger’s needs. Specifically, the plan provides:

- ▶ An inventory of existing specialized transportation services catered for each population need, and
- ▶ A regional assessment of transportation needs for seniors, individuals with disabilities, and persons with limited means based on best-practices research conducted across the country.

1.6 LOOKING FORWARD

The operational design of transportation services developed to reduce or eliminate gaps and deficiencies identified in the Coordinated Plan are the responsibility of the transit agencies and the other members of the transportation community. In some cases, these organizations may apply for funding under the competitive grant programs administered by SANDAG to fulfill projects identified and prioritized in the Coordinated Plan.

The Coordinated Plan also has been developed so that the two local transit agencies and transportation providers receiving local and federal funding can address any deficiencies identified through the performance monitoring program included in the Coordinated Plan. This process involves preparation of the annual Service Implementation Plans, which are prepared by the transit operators and incorporated into the Coordinated Plan to address annual service changes and improvements.

The continued attention to inclusion of rural transportation needs enables rural communities, and organizations serving rural communities to be eligible for additional federal grant funds administered by the State of California. Both the rural and urban transportation needs are articulated in Chapter 4 and organized as prioritized strategies in Chapter 7, and are designed to provide a guide for responding to transportation funding opportunities. Chapter 5 will provide a detailed guide to match needs with existing or suggested transportation services based on an individual's needs and services available.

The Coordinated Plan



Chapter 2



Community Outreach and Public Involvement

CHAPTER 2: COMMUNITY OUTREACH AND PUBLIC INVOLVEMENT

The Federal Transit Administration (FTA) requires that the Coordinated Plan be prepared and updated at least every four years and include significant public outreach. Since the inception of the Coordinated Plan, the San Diego Association of Governments (SANDAG) has chosen to prepare annual updates to the Coordinated Plan, with public outreach adjusted to reflect the extent of proposed revisions to the document. Appendix A includes the public outreach documentation for the outreach effort conducted over the past year, which includes a copy of the transportation provider survey (detailed below). The 2012-2016 Coordinated Plan also involved eight outreach meetings (including tribal lands) that occurred after the survey was conducted. These meetings were distributed throughout both urban and rural parts of the County to encourage broad community participation. Meetings were held in afternoons and evenings, at familiar community spaces and were accessible by public transit. Additionally, bi-lingual translators were utilized to encourage non-English speaker participation in the outreach process. A public hearing on the proposed plan was conducted by the Social Services Transportation Advisory Council (SSTAC) in San Diego on September 19, 2011¹, and a public hearing was held by the SANDAG Transportation Committee on July 6, 2012, followed by a Board of Directors meeting on July 27, 2012.

2.1 Public and Stakeholder Involvement

A public outreach component including a wide variety of organizations² is required for the development of the Coordinated Plan. It is required that the Coordinated Plan be updated at least every four years in air quality nonattainment and maintenance areas and five years in air quality attainment areas. However, SANDAG consolidates its Coordinated Plan responsibilities with the regional requirement to develop a Regional Short-Range Transit Plan not less than every two years. The federal guidance states that the Coordinated Plan should be developed through a process that includes the representatives of public, private, and nonprofit transportation providers, as well as participation by members of the public. Furthermore, the guidelines stipulate that members of the public should include representatives of the targeted populations, including older adults, individuals with disabilities, and people with low incomes. The guidance also recommends consultation with an expansive list of stakeholders throughout all phases of the Coordinated Plan development.

¹ The California Public Utilities Code (CPUC) requires SSTAC to hold at least one public meeting each year for the purpose of soliciting input from transit-dependent disadvantaged persons, including seniors, persons with disabilities, and persons of limited means.

² Organizations may include, but are not limited to, state and local officials and elected representatives/tribal governments, private/public/nonprofit/Americans with Disabilities Act transportation providers, social service agencies involved in transportation, taxi service providers, intercity bus operators, vanpools, flex car operators, business community/employers, economic development agencies, transit riders and potential riders, protection and advocacy organizations, agencies that administer employment or other support programs for targeted populations, faith-based and community-based organizations, and school districts/colleges.

► Social Services Transportation Advisory Council

The main group involved in the development of the 2012-2016 Coordinated Plan was the Coordinated Plan Adhoc Group (CPAG), which is a temporary group made up of less than a quorum, of the Social Services Transportation Advisory Council (SSTAC). The CPAG was specifically formed to guide the development of the Coordinated Plan and provide qualified expertise toward enhancing the region's passenger-centered transportation network. The group was comprised of community members, social service representatives, and a member from the County's Health and Human Service Agency.

While the CPAG's primary responsibility is to guide the conversation of the Coordinated Plan development, similarly the mandate of the SSTAC is to assist SANDAG with responding to federal and state requirements, as well as local concerns and involvement in accessibility issues. Responsibilities of the group also include review and advice on federal funding programs for the elderly and disabled and coordination of vehicles for elderly and disabled persons. As such, the group provided an excellent fit to guide the development of the Coordinated Plan.

In order to ensure consistent participation in the Coordinated Plan development by stakeholders and members of the public, the SSTAC provided input and feedback at both regular and special meetings. The composition of this group includes the following representatives:

- ▶ One of potential transit users who is 60 years of age or older
- ▶ One of potential transit users who is a person with a disability
- ▶ Three of the interests of seniors, persons with limited means, or disabled transit users who are well versed in the Americans with Disabilities Act (ADA) and Title 24 regulations;
- ▶ Two of the local social service providers for seniors, including one representative of a social service transportation provider, if one exists;
- ▶ Two of local social service providers for individuals with disabilities, including one representative of a social service transportation provider, if one exists;
- ▶ One of a local social service provider for persons of limited means;
- ▶ Two from the local consolidated transportation service agency, designated pursuant to subdivision (a) of Section 15975 of the Government Code, if one exists, including one representative from a transportation service provider, if one exists;
- ▶ One from North County Transit District (NCTD) representing fixed-route service;
- ▶ One from NCTD representing ADA Paratransit service;
- ▶ One from Metropolitan Transit System (MTS) representing fixed-route service; and
- ▶ One from MTS representing ADA Paratransit service.

► **Regional Transit Planning Task Force**

The Regional Transit Planning Task Force also contributed to the update of the plan. It includes staff members from the two transit operators in the County, MTS, and NCTD, along with members from SANDAG and the Consolidated Transportation Service Agency (CTSA). The Task Force is responsible for providing insight and guidance of the planning efforts identified in the latest 2050 Regional Transportation Plan (RTP) to be implemented in the next five years. Being as the Coordinated Plan is, in its capacity, the Short-Range Transit Plan, the Coordinated Plan provides the framework for transit system development over this five year period and equally reflects the goals and direction for service development as described in the RTP. Utilizing the plan as a conduit for addressing future planning objectives, the group discussed the Coordinated Plan at its quarterly meetings and provided input into the development of the updated edition of the Coordinated Plan. Additionally, transit staff from both MTS and NCTD provided key performance measures utilized in Chapter 3 and Appendix L. Transit agency staff members also provided the Service Implementation Plans (Appendix F) used to develop the Regional Service Implementation Plan included in Chapter 9.

2.2 Outreach Efforts

► **Transportation Provider Survey**

In a continued effort to maintain an updated list of social service transportation providers within the San Diego region, SANDAG conducted a public survey to over 120 providers. The survey was intended to 1) assess which types of transportation options are available to San Diego residents and visitors and, 2) identify potential opportunities and existing needs within the region that relate to specialized transportation. Identifying geographic service gaps as well as assessing which populations are being served in relation to their demographic density, was a priority in this outreach effort. The 2012-2016 Coordinated Plan closely identifies the communities most inclined to utilize specialized transportation services (outlined in Chapter 4). This survey helps respond to these communities' needs by identifying which transportation services are used for each identified population. The survey was also utilized to recognize other communities not yet identified within the plan that require additional consideration for specialized transportation. A more detailed discussion and depiction of the results of the survey can be found in Chapter 5. To keep track of transit services, SANDAG also monitors fixed-route transit services through its Passenger Counting Program which utilizes both on-board ride checkers as well as Automated Passenger Counting equipment.

► **SSTAC Public Hearing**

The California Public Utilities Code (CPUC) requires that the SSTAC hold at least one noticed meeting to receive comment from the public on transportation issues. In 2011, this meeting was held on September 19, 2011, to solicit the input of transit-dependent and transportation-disadvantaged persons, including seniors, persons with disabilities, and persons with limited means. Appendix A contains the public notice used for this meeting.

▶ **Public Comment Period**

The SANDAG Public Participation/Involvement Policy establishes a process for obtaining input from, and providing information to the public. Public outreach is conducted concerning agency programs, projects, and program funding in order to ensure the public is informed and has the opportunity to provide SANDAG with input so plans can reflect the public's desire. In addition to the feedback received at the SSTAC Public Hearing, SANDAG has also incorporated input gathered from the various public outreach meetings held throughout the County. Comments received for the Coordinated Plan within the comment period and any appropriate revisions were included in the final document.

▶ **SANDAG Public Hearing**

SANDAG Board Policy requires the approval of the Coordinated Plan by the SANDAG Transportation Committee be held after a public hearing. The public hearing was held on July 6, 2012.

The Coordinated Plan



Chapter 3



Measuring Our Success

CHAPTER 3: MEASURING OUR SUCCESS

3.1 Purpose

The performance monitoring program was developed to retain a regional perspective on the transportation system as a whole, but it also was conducted to assist the transportation agencies with their evaluation of current or future service expansions or contractions. In addition, with an understanding that public transit is not always an appropriate or applicable service, social service transportation evaluation has been included to round out the entire context of available transportation solutions within the region. Monitoring of these programs helps to develop an understanding of their contribution to the host of transportation solutions available.

This chapter begins with an overview of the goals and policies of the 2050 Regional Transportation Plan (2050 RTP) and how they have been refined and enhanced in this Coordinated Plan to evaluate the transit and social service transportation system. This is followed by the overall goals and objectives to guide the development of the transit and social service transportation systems over the next five years. Finally, since transit funding also is tied to state funding sources, a description of the state-mandated evaluation process is included in this chapter.

3.2 Vision and Goals

The SANDAG 2050 RTP is the long-range blueprint for a regional transportation system that further enhances the quality of life, promotes sustainability, and offers more mobility options for people and goods. The Coordinated Plan implements the RTP transit and social service transportation vision on a rolling five-year time period. The RTP vision describes a transportation system that:

- Supports a prosperous economy
- Promotes a healthy and safe environment which includes climate change protection
- Provides a higher quality of life for all San Diego County residents

The development of transit and specialized transportation services can enhance these elements in developing a more sustainable future transportation system. Furthermore, the RTP expands this vision into six specific goals surrounding two themes:

1. Quality of Travel & Livability

- Mobility: The transportation system should provide convenient travel options;
- Reliability: The transportation system should be reliable; and
- System Preservation and Safety: The transportation system should be well-maintained to protect the public's investments in transportation.

2. Sustainability

- **Social Equity:** The transportation system should be designed to provide an equitable level of transportation services to all segments of the population;
- **Healthy Environment:** The transportation system should promote environmental sustainability and foster efficient development patterns that optimize travel, housing, and employment choices; and
- **Prosperous Economy:** The transportation system should play a significant role in raising the region's standard of living.

In order to specifically evaluate transit and social service transportation in the San Diego region, a series of 11 goals for the coordinated transportation network was developed. These goals were based on the visions of the four agencies (Metropolitan Transit System (MTS), North County Transit District (NCTD), Consolidated Transportation Services Agency (CTSA), and the San Diego Association of Governments (SANDAG)) involved in planning and operation of the transportation system, along with the overarching goals of the 2050 RTP identified above.

The coordinated transportation network goals along with their relevant 2050 RTP *goals* are:

- ▶ Develop a network of fast, flexible, reliable, safe, and convenient transit services that maximize the role of transit in the region and reduce vehicle miles traveled and greenhouse gas emissions (*Mobility and Healthy Environment*);
- ▶ Offer accessible public and social service transportation services in San Diego that are reliable, offer competitive travel times to major destinations, and provide consistent travel times for the same trip and mode of transportation (*Reliability*);
- ▶ Reinforce and upgrade existing transit services in key urban corridors, and pursue new transit projects in the most urbanized areas of the region using a broad combination of transit modes (*System Preservation & Safety*);
- ▶ Maximize the farebox recovery rate and ensure that operation of the transit system is fiscally responsible (*System Preservation and Safety*);
- ▶ Offer accessible public and social service transportation services in San Diego without discrimination on the basis of race, color, language, national origin, or disability (*Social Equity*);
- ▶ Enhance the mobility choices of the transportation disadvantaged by improving coordination and developing alternative models of transportation (*Social Equity*);
- ▶ Provide accessible lifeline public and social service transportation to all populations (*Social Equity*);
- ▶ Develop a strong link between transit and transit supportive land use patterns to maximize the cost-effectiveness of future transit investments (*Healthy Environment*);
- ▶ Offer accessible public and social service transportation services that support the smart growth policies as outlined in the Regional Comprehensive Plan (*Healthy Environment*);
- ▶ Offer affordable and accessible public and social service transportation services that are productive, coordinated, convenient, and appropriate for the markets being served (*Healthy Environment and Prosperous Economy*);

- ▶ Provide an accessible transit network in the urban areas that offers frequency and span of service to support spontaneous use for a wide range of needs to support a diverse economy (*Prosperous Economy*).

3.3 Regional Performance Evaluation Program

The objectives and performance indicators included in the regional performance evaluation program evaluate transit service on a five-year time horizon. This allows SANDAG to more carefully evaluate transit performance and to ensure that additional planning and funding resources are allocated appropriately. This section provides the evaluation of transit service and also includes indicators to monitor social service transportation as originally required by the federal government in Safe, Accountable, Flexible, and Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU).



▶ Regional Transit Service Monitoring, Implementation and Links to the RTP

The monitoring of transit performance provides a tool to annually assess the overall health of the regional public transit system. The objectives explored in this section are derived from the 2050 RTP and Coordinated Plan goals and specifically fall under two categories, fixed-route transit and specialized transportation. As articulated in the 2050 RTP, the development of an ambitious and far-reaching transit network that significantly expands the role that transit plays in meeting the region's mobility needs is dependent on the development of three key strategies:

- ▶ Improvements to the current system that will improve the convenience and travel speeds of bus and rail services.
- ▶ Implementation of new transit services that will improve transit connections and access in key urban areas and offer new service types designed to attract new riders to transit.
- ▶ Enhancements to the transit customer experience to make transit easier, safer, and more enjoyable to use.

The 2050 RTP also places more attention on transportation for seniors, people with limited means, and individuals with disabilities. While the 2050 RTP provides a broad framework for these services, the Coordinated Plan provides the specific strategies to guide these investments. To accomplish this, the 2050 RTP includes additional funding for supplemental specialized transportation services, which is estimated to be five percent of the cost of fixed-route transit.

▶ Guidelines vs. Targets

Under these 2050 RTP action items, the general approach to evaluating transit and social service transportation includes the setting of guidelines where the requirement is in a SANDAG policy or the requirement is a target in state or federal regulations. The guidelines presented in this chapter are based on a five-year service objective, which can be adjusted, as needed, to reflect changing conditions. These conditions may include, but are not limited to, funding, energy costs, and the health of the local economy. The guidelines also may be updated to reflect changes in funding

levels or from a desire to adjust service levels. On the other hand, the identified targets are based on requirements established by state and federal legislation or regulations.

► **Interpreting the Results**

The results of the performance indicators give the transit agencies, SANDAG, the public, and elected officials valuable information, including:

- Evaluation of regional transit system performance;
- Determination of whether sufficient funding is being provided to the regional transit system to meet the guidelines and targets;
- Indication of the need for transit priority measures and, once implemented over time, how well they are performing in terms of improving transit performance;
- Assessment of regional efforts to better link transit and land use planning through regional smart growth programs; and
- Identification of deficiencies or service gaps.

► **Methodology and Performance Indicator Development**

Care has been taken to identify objectives that can easily be quantified and indicators that can be objectively measured with existing or proposed data sources. Should the development of new transportation funding sources arise, or if unspent fund balances are re-allocated for local programs, the evaluation of transit service performance may enable the justification for the programming of future funds for transit given the ongoing evaluation of actual quantitative performance data.

The goals and objectives influence the design and quality of the transit service and implement the transit vision of the RTP. The RTP policy goals and objectives are to be applied across the entire county, while the performance indicators and guidelines have been tailored to specific environments. The guidelines help provide clarity for decision makers and the public regarding the level of transit service proposed to be provided regionally and assist individuals in making decisions on where to locate their residence, place of employment, choose a school, or location for their business.

► **Comprehensive Performance Evaluation Categories**

The comprehensive objectives are based on regional issues as they relate to transit and social service transportation. These objectives include multiple variables or results which have regional impacts beyond transit or social service transportation. The passenger-centered comprehensive objectives address the following categories:

- Greenhouse Gas (GHG) Reduction Measures
- Regional Growth

► Transit Performance Evaluation Categories

The transit objectives are based on subregional areas that group similar geographic or demographic areas. These objectives either relate to the goals of the Regional Comprehensive Plan (RCP), the RTP, or have consistently been tracked through the annual Transportation Development Act (TDA) performance improvement program. The transit objectives address the following categories:

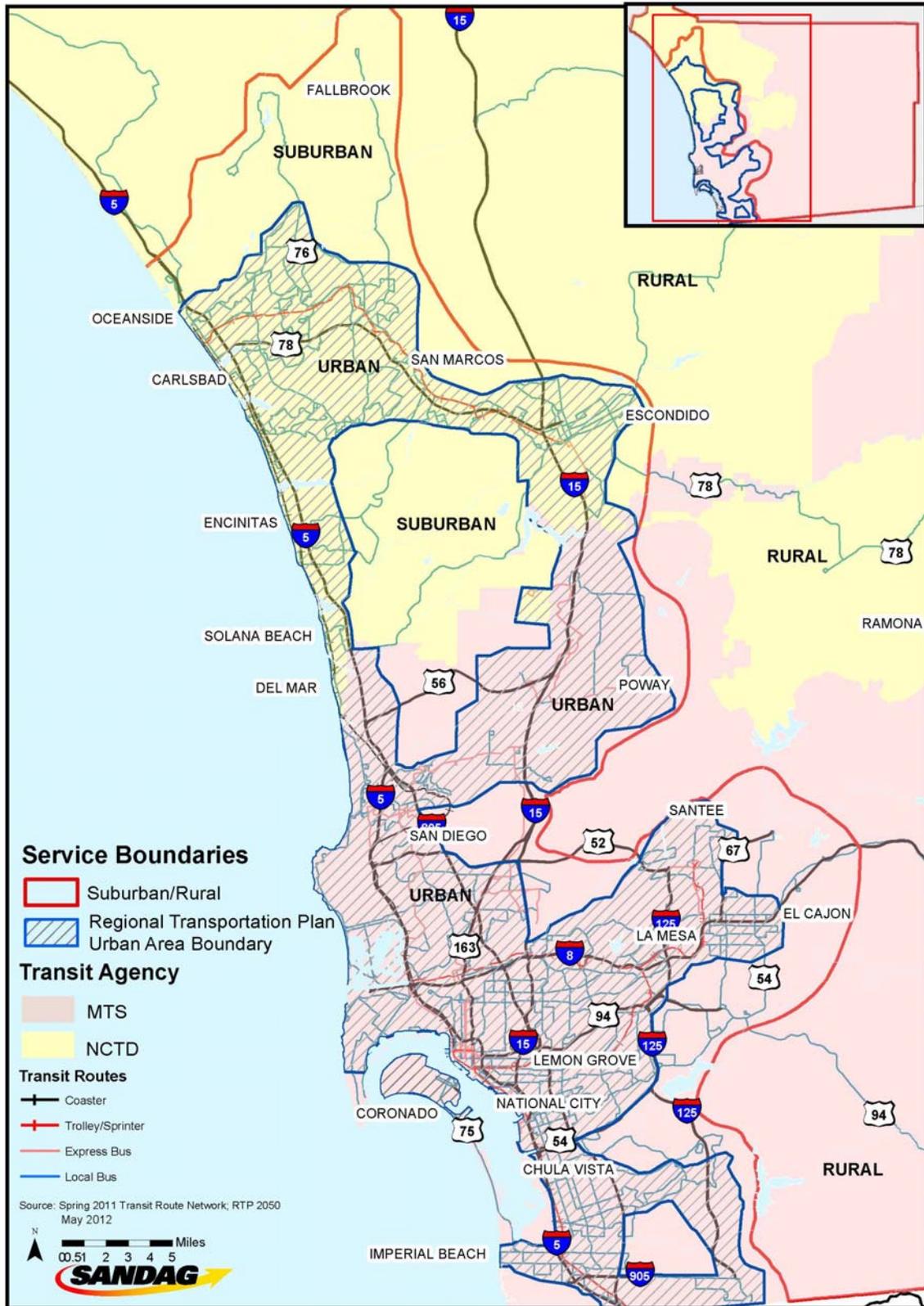
- Financial
- Productivity
- Access
- Convenience
- Reliability and Speed
- Environmental Justice
- Comfort

A brief description of the performance results relating to these categories is included in this chapter, while the detailed statistical tables are included in Appendix L. This report also includes data sets reported in prior years in order to ensure statistical continuity between previous Regional Short-Range Transit Plans and future Coordinated Plans (Appendices B and C). It is anticipated that in future plans, this data set will be improved and expanded as new data from automated sources becomes available to encompass social service transportation.

► Service Zones

The Coordinated Plan must integrate the transit vision of the 2050 RTP, the smart growth objectives of the RCP, the short-term service objectives of the MTS Comprehensive Operations Analysis (COA) and NCTD's forthcoming Mobility Plan. To do this, San Diego County was divided into three distinct types of service zones based on land use, demographics, and travel behaviors in order to more carefully evaluate transit service in these zones. These three zones are urban, suburban, and rural, which are shown in Figure 3.1. The objectives, indicators, and guidelines or targets provide policy direction to the two transit agencies as they implement service to ensure that it is provided efficiently, effectively, and equitably across the entire service area. The objectives and indicators usually apply across all zones, but the guidelines will generally vary by zone reflecting the different needs and markets in the urban, suburban, and rural zones.

Figure 3.1: Service Zones



The urbanized area boundary was developed through the 2050 urban area transit strategy shown in Figure 3.1. The largest urban area within the urban zone covers the denser central, south, and east county areas and extends from University City on the north to Imperial Beach in the south and from the coast east to El Cajon. The northern urbanized area follows the SPRINTER corridor in North County and includes parts of Oceanside, Escondido, Carlsbad, Vista, and San Marcos. The coastal urban zone generally covers the lands between I-5 and the Pacific Ocean from La Jolla to Oceanside. The urban zones are characterized by two key factors that support high levels of transit service: higher-density, transit-oriented land uses (residential, commercial, industrial, institutional) and good access to transit via a network of arterial and collector roadways. A rich transit network in this zone should be provided and designed to allow for spontaneous use for a wide range of destinations and trip needs throughout the day, including early evening.

The suburban zone surrounds the urban zone. The suburban zone is characterized by low-density development and street patterns that make access to transit difficult. These areas may include some smart growth development, including pockets of transit-oriented residential, commercial, and institutional uses; however, the overall development pattern is not always transit friendly for fixed route services. The result is that spontaneous transit use is more challenging here, requires a greater sensitivity to local conditions, and a larger repertoire of solutions to be effective. Thus, transit services in the suburban zone are best oriented toward providing peak-period commuter services, linkages to major destinations in key travel corridors, and community-based services tailored to individual community needs. The provision of park-and-ride facilities is needed to maximize access to the peak-period commuter services.

The third zone (rural) extends from the eastern edge of the suburban zone into the backcountry areas. The limited transit services are designed to maintain lifeline access to rural villages.

The zones were initially developed to support planning for public transportation; however, in the future they also may become a useful tool in planning for social service transportation. It may become necessary in the future to use the zones as means of prioritizing social service transportation needs and expenditures. For example, it seems unlikely that the region will be able to provide the same level of social service transportation services and mobility choices for people living in rural areas as for those people who are living in urban areas.

► **Comprehensive Objectives**

The comprehensive objectives outlined below involve more than just transit or social service performance data. The climate change indicator includes an evaluation of the future benefit of transit toward regional GHG reduction targets, while the growth objectives looks at transit ridership compared to other growth measures in the region.

GHG REDUCTION OBJECTIVE

Public transit can play an important role in the reduction of regional GHG emissions to combat global climate change. In doing so, transit can contribute to the emissions reductions targets included in California Senate Bill (SB) 375 (Government Code § 65080 *et seq.*) for passenger cars and light-duty trucks. Quantifying potential GHG emissions reductions from transit operations will help achieve the draft targets set by the California Air Resources Board required by SB 375. This analysis also will support the SANDAG development of a Sustainable Community Strategy, also required by

SB 375. Since passenger cars and light-duty trucks account for about 41 percent of the region's cumulative GHG emissions¹, transit's role is potentially substantial in order to curb GHG emissions down to desired levels. All new bus fleets are Compressed Natural Gas (CNG) and eventually the entire region will be 100 percent run on alternative fuels. The anticipated benefits of transit ridership on GHG reductions will be quantified and incorporated into future Coordinated Plans².

The transit GHG reduction objective and guideline are as follows:

Objective Reduce regional GHG emissions

Guideline Reduced carbon emissions from the expansion or addition of regional transit services

Result No regional services were added or changed in FY 2011

GROWTH OBJECTIVE

In the San Diego region, ridership growth is measured against growth in population and against growth in employment and growth in vehicle registrations. The need to increase transit ridership is a corollary to the service growth projected in the RTP. In addition, many existing services have additional capacity to handle more riders at no additional cost; however, much of the capacity is in the off-peak direction or during off-peak periods. To take advantage of this capacity may require land use change and significant transit-oriented development, which is beyond the direct control of SANDAG and the transit operators.

Objective The ridership for each transit agency shall grow faster than the rate of growth in population, jobs, and private vehicle registrations within their service area.

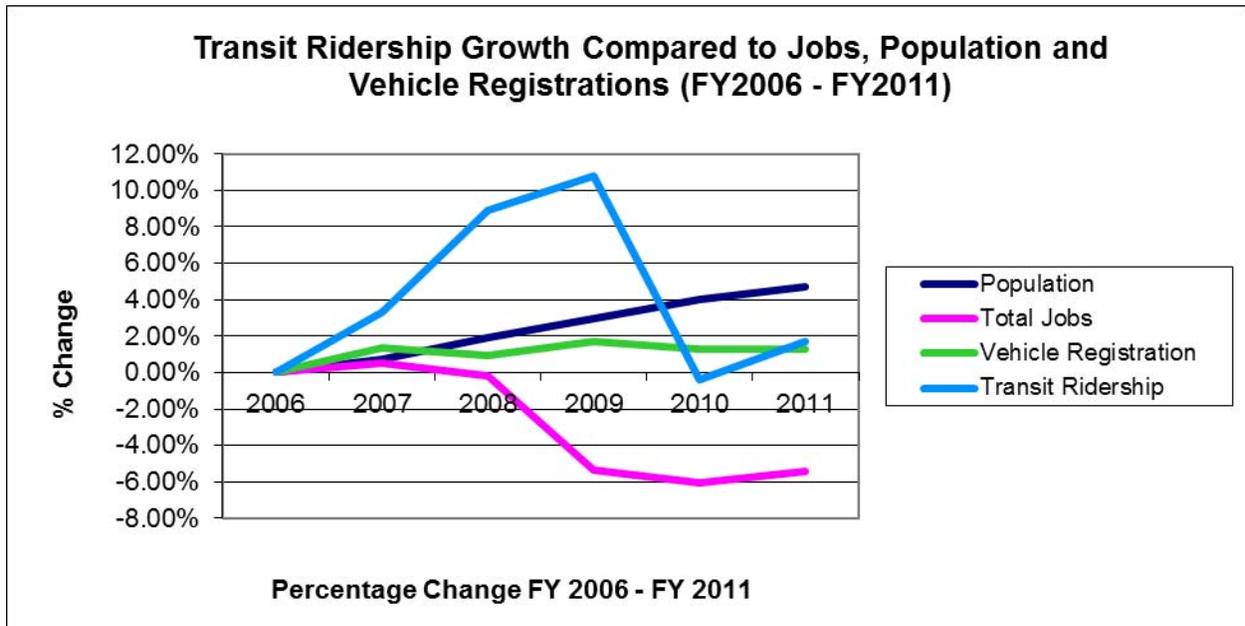
Guideline Year-over-year growth in transit ridership by operator.

Results Between FY 2006 and FY 2011, transit ridership increased by 5 percent. More specifically, from 2006 to 2009, Transit ridership increased by 10 percent with a drop in ridership due to the recession in 2009. The loss in jobs experienced in 2009 and 2010 directly matches the drop in transit ridership. Starting in 2010, both ridership and total jobs incrementally increased .

¹ From the September 2008 "San Diego County GHG Inventory" report prepared by the Energy Policy Initiatives Center (EPIC), University of San Diego.

² Available reporting methodologies include the Climate Registry's "Performance Metrics for Transit Agencies" (June 2010, Version 1.0), which include three specific metrics: emissions per passenger-mile traveled, emissions per vehicle-mile and emissions per revenue vehicle-hour.

Figure 3.2: Transit Ridership Growth Compared to Jobs, Population, and Vehicle Registration (FY2006 – FY2011)



TRANSIT OBJECTIVES

The objectives outlined below are designed to provide the quantifiable outcomes for the transit-related goals articulated earlier in this chapter. As with the evaluation of the TDA performance measures included later in this chapter, poor performance by any particular operator or service is not to be seen as a criticism of the service itself, but rather a validation of the need for additional funding sources. Services also exhibiting negative trends may use the data to re-evaluate all or part of the service and seek ways to coordinate components to achieve greater efficiencies or to combine services to achieve greater productivity.

The performance of each agency is summarized, while the detailed tables listing the quantitative performance data are included in Appendix L. The data specifically used to evaluate the environmental justice objective is included in Appendix H with the smart growth maps included in Appendix I.

FINANCIAL OBJECTIVE

This objective addresses the farebox recovery goal to ensure fiscally responsible operations. The cost recovery goal and objective provides an evaluation of the financial health of the systems and their continued eligibility for state financial support. The financial objective has been split into two parts: targets emanating from the TDA of California and guidelines set forth in SANDAG policy. The TDA objective has a target rather than a guideline as SANDAG is required by the TDA to establish firm cost-recovery targets for MTS and NCTD. The cost-recovery indicator helps to determine the appropriateness of the fare structure and the ability of the system to generate ridership and revenue. The TDA of the State of California requires that MTS generate a cost recovery of at least

31.9 percent for all services except the Commuter Express Service, which must achieve a 20 percent cost recovery. NCTD must achieve a minimum cost recovery of 18.8 percent for all services. Additionally, the SANDAG guideline stems from Board of Directors' direction to obtain a farebox recovery ratio that is higher than the TDA targets to encourage revenue growth and ridership (SANDAG Policy 29). To do this, the SANDAG guideline was developed to track farebox recovery growth in terms of trends above the TDA thresholds.

Objective For each transit agency to meet or exceed minimum farebox cost-recovery targets or guidelines.

TDA Target Percentage of operating costs recovered from fare revenue for fixed-route and demand responsive services (31.9 percent MTS, 20 percent MTS Commuter Express, 18.8 percent NCTD, and 10 percent MTS ADA and NCTD ADA).

Results Both transit agencies met the performance targets for this objective.

SANDAG Guideline Farebox recovery should improve annually above the minimum TDA targets.

Results MTS met this objective for fixed-route and an analysis of MTS ADA services was unavailable. This was due to the accounting methodology for overhead costs changed during this time period which affects the calculation of the MTS ADA Paratransit farebox recovery. For fiscal years 2009 and 2010, overhead expenses were allocated as an annual amount in the fourth quarter of each fiscal year. Starting in FY 2011, MTS began allocating monthly, with the beginning of this analysis period (FY 2008) having no overhead costs. MTS also updated the cost allocation methodology used during this evaluation cycle. Each operator allocated costs using passenger count ratios in fiscal years 2009 and 2010. Since the small passenger volume within Paratransit does not accurately reflect the effort required to serve these passengers, the methodology for the cost allocation was changed to revenue miles in FY 2011. This spreading of the overhead costs created a more equitable cost distribution among the operators but created a challenge in evaluating five year trends. NCTD met the objective for ADA Paratransit services but fell just shy of the fixed-route objective with a change from 26 percent farebox recovery in FY 2008 to a farebox recovery of 25 percent in FY 2012. This was due to a large increase in unemployment over the evaluation period given that NCTD relies on the commute sector for one of its major services (COASTER heavy rail).

PRODUCTIVITY OBJECTIVE

This objective addresses the goals to operate productive services that also are convenient and appropriate for the markets being served. In order to meet this goal, an objective was developed to measure productivity and to judge whether appropriate levels of service are being provided. Separate guidelines have been established for each service type to reflect differing expectations. A guideline was chosen instead of a target, as this is a SANDAG policy objective, rather than a state or federal requirement. The productivity evaluation includes an evaluation of passengers per revenue-hour and average percentage of seats occupied. Both measures provide a passenger-centric means of evaluating productivity and the attractiveness of a service.³ Calculating a load factor for a transit service has some similarity to a capacity analysis for a roadway. Both roads and transit services are well utilized during peak periods, but when measured over an entire operating day, the capacity utilization is much less. Transit systems reduce capacity or headway during off-peak hours to keep their load factors from falling too low. Roads, as fixed facilities cannot usually reduce capacity in off-peak hours⁴.

Objective To operate transit services that are productive and appropriate for the markets being served.

Guideline 1 Average annual revenue passengers per revenue service-hour by operator (at least 35 revenue passenger boardings/service-hour for MTS and at least 20 revenue passenger boardings/service-hour for NCTD).

Results Both MTS and NCTD met both guidelines for this objective.

Guideline 2 Average percentage of seats occupied (load factor) at or above the set thresholds included in Appendix L, which vary by service type, zone and time of day (peak/off peak).

Results In FY 2011 MTS met all of the guidelines for this measure with the exception of the Urban Peak Community bus service (guideline of 25 percent with performance of 24 percent). It is notable; however, that MTS improved performance on the Urban Weekday Community bus service which was above the set guideline in FY 2010 and FY 2011.

NCTD met all but the Urban Corridor (SPRINTER) guidelines in FY 2011. This can be attributable to the downturn in the economy. It is notable, however, that NCTD improved performance on the Urban Regional (COASTER) service with performance exceeding the threshold in FY 2011. This may be attributable to the fare decreases that took place in FY 2011. NCTD Rural Local Bus service also improved between FY 2009 and FY 2010/2011 from 14 percent to 24 percent.

³ Transit productivity is impacted by nonproductive time resulting from deadhead, layovers, and operator makeup time (time for which drivers are paid, but are not driving), which means that load factor may be a less valuable measurement for analyzing specific routes. MTS and NCTD will need to continue to look at other more detailed measurement techniques to determine potential service adjustments at the route or route segment level.

⁴ In urban areas, transit services that manage an overall daily load factor average of at least 20 percent are doing well. A typical urban arterial, such as Balboa Avenue in San Diego, El Camino Real in North County, and H Street in Chula Vista also have a typical all-day capacity utilization rate by all vehicles of about 20 percent. Sample capacity calculations for these arterial roadways are provided in Appendix G.

ACCESS OBJECTIVES

Transit access can involve issues such as walking distance to a bus stop, the provision of wheelchair lifts or ramps, and the provision of complementary ADA dial-a-ride service.



The access objectives identify guidelines on how far people must walk or drive to access transit, as well as linking transit accessibility to the SANDAG smart growth program. Accessibility targets have been established for bus stops as the requirements are federally mandated. In some cases, cities rather than transit operators may be responsible for bus stops. However, this objective is provided here to be consistent with the passenger-centered focus of this Coordinated Plan and to

ensure that this indicator is tracked and the appropriate authorities are reminded of their responsibilities.

Walking Distance

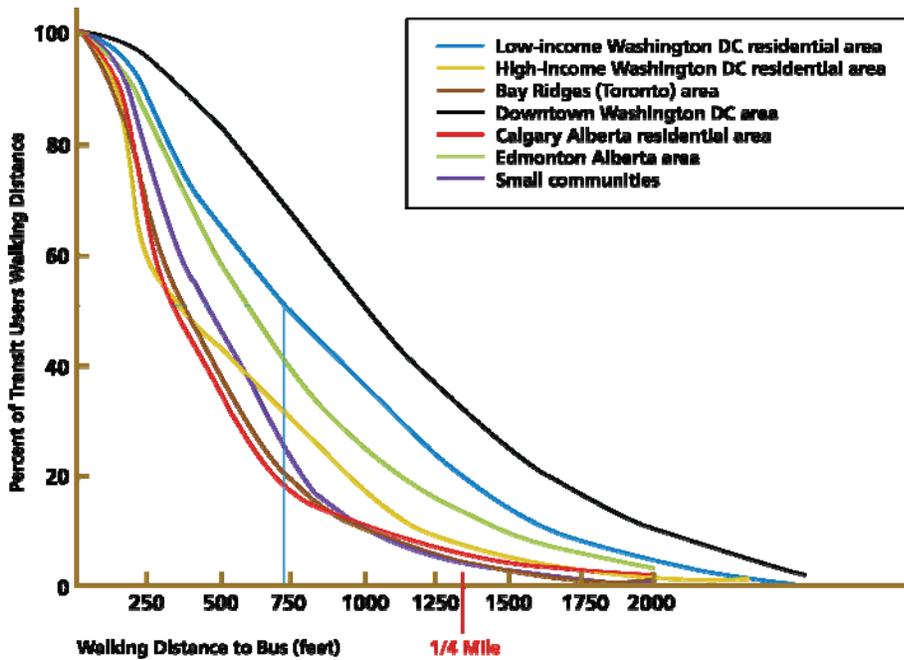
Walking distance to a bus stop is one of the major determinants of transit usage. The closer a bus stop is to a person's point of origin or destination, the more likely they are to choose transit. Several research studies in the United States and Canada have shown that about half of all transit passengers walk less than 750 feet to a bus stop. The graph in Figure 3.3 illustrates the results of this research.

The topography of hills and canyons in San Diego County means that the street network is discontinuous, and pedestrian routes are often interrupted by geographic barriers. Therefore, it is very difficult to provide good transit coverage, even in many parts of the urban zones. This means the guidelines are relatively conservative. Smart growth will encourage future population growth to occur near transit stops, which should increase the percentage living within the specified distance. The land use change will be a slow process that will occur over many years.

In addition to nonwork trips, the proposed guideline recognizes that employment is a major generator of transit trips. Focusing the guideline on employment reinforces the role of the transit system as supporting economic activity and access to jobs.

The results for this indicator are derived through the use of actual walking (or driving) distance from origin to destination utilizing advanced geographic information systems extensions.

Figure 3.3: Walking Distance Behavior



Source: Canadian Transit Handbook, Third Edition, Canadian Urban Transit Association

Objective 1 In urban areas, transit and land use development should ensure a comfortable walking distance to transit for residents and jobs.

Guideline 1 80 percent of residents or jobs within one-half mile of a bus stop or rail station in urban areas.

Results Both MTS and NCTD met the guidelines for this objective.

Objective 2 Transit and land use development should attempt to ensure that in suburban areas, residents are within a reasonable distance of a park-and-ride facility with access to the transit network, or a bus stop and transit services should be provided to existing or planned smart growth areas.

Guideline 1 100 percent of suburban residences within five miles of a transit stop services.

Results Both MTS and NCTD met the guidelines for this objective

Guideline 2 70 percent of residents and 75 percent of jobs within one mile of a bus stop or rail station in suburban areas.

Results NCTD met both guidelines for this objective (suburban residential and employment access). MTS fell just shy of the two indicators. This is primarily due to the sprawling employment sites which are difficult for MTS to serve all sites under current budget constraints.

Smart Growth

To provide consistency with the smart growth objectives of the SANDAG RCP, the following performance measure recognizes the critical link between land use and transportation services.

Objective 3 Transit service should be designed to support smart growth.

Guideline Transit service should be designed to support the smart growth areas located on the SANDAG Smart Growth Concept Map.

Results One hundred percent of the “existing/planned” smart growth areas included on the SANDAG Smart Growth Concept Map are served by the minimum transit thresholds specified in the RCP. (The minimum transit service characteristics for the various smart growth place types include commuter rail, light rail transit, express light rail transit, bus rapid transit, peak bus rapid transit, rapid bus, streetcar/shuttle, and high-frequency peak period local bus.) The vast majority of “potential” smart growth areas also are served by the minimum transit service thresholds. Only four⁵ potential smart growth areas do not meet the minimum transit service level called for in the RCP. This analysis is based on the technical update of the Smart Growth Concept Map Site Descriptions (accepted by the Board of Directors on January 27, 2012). Significant updates to the smart growth opportunity areas have been made since the 2010-2014 Coordinated Plan.

According to the updated Smart Growth Concept Map Site Descriptions, there are 20 areas which require high-frequency peak period local transit service (defined as 15 minute peak period headways) under the operational purview of the transit agencies. Fourteen areas⁶ are located in the MTS service area, and six⁷ are located in the NCTD service area. Maps illustrating these areas along with the areas that do not meet the minimum transit thresholds (described above), are shown in Appendix I. There is recognition that, while service to the potential smart growth areas is desirable, implementing higher levels of transit service needs to be based on the overall transit demand of each area. As such, MTS and NCTD will continue to review the demand potential in these potential smart growth areas compared with the demand in other areas where service improvements are needed. Given the current budget shortfall faced by the transit agencies, the ability to implement service improvements will likely be constrained over the next several years.

⁵ Poway, 100% corner (at Poway Road and Community Road) (PW-1), Poway, Pomerado Hospital area (on Pomerado Road south of Bernardo Heights Parkway) (PW-2), San Diego Clairemont Mesa, Mesa College Drive (SD-CM-9), San Diego Navajo (along Mission Gorge Road north of Zion) (SD-NV-2)

⁶ El Cajon, Grossmont Community College (at SR 125 and Grossmont College Drive) (EC-3), La Mesa, La Mesa Boulevard (between Spring Street and Fletcher Parkway) (LM-6), La Mesa, El Cajon Boulevard (between 73rd Street and La Mesa Boulevard, extending on La Mesa Boulevard until University Avenue) (LM-9), San Diego Black Mountain Ranch (southwest of intersection of Camino del Sur and Black Mountain Road) (SD-BMR-1), San Diego City Heights, Euclid Avenue (from El Cajon Boulevard to University Avenue) (SD-CH-2), San Diego Otay Mesa (South of I-905 and Oceanview Hills Parkway) (SD-

Lifeline Services

Lifeline services serve as a transportation network, transportation program or service guidelines that aid in transporting transit-dependent and transportation-disadvantaged individuals to essential destinations and daily activities. Lifeline services are typically available to individuals residing in communities that are lightly served by transit. The evaluation of lifeline services helps to ensure that at least some level of service is provided to areas that have been identified as smart growth opportunity areas.

Objective 4 Transit should attempt to maintain existing lifeline services to currently identified rural village smart growth areas.

Guideline One return trip provided at least two days per week to destinations from rural villages identified on the Smart Growth Concept Map.

Results Both MTS and NCTD met both guidelines for this objective.

Accessible Services

The evaluation of accessible services helps to ensure that accessible services are provided to disabled populations in the region.

Objective 5 Attempt to provide fully accessible bus stops and transit stations.

Guideline 100 percent of bus stops and transit stations that are fully accessible.

Results Neither MTS nor NCTD currently meet the guidelines established for this category. MTS has finished developing a comprehensive inventory of the top 100 bus stops and will be developing a plan to prioritize and retrofit non ADA-compliant stops. Additionally, NCTD has developed a program to look beyond the accessibility of the stop to look comprehensively at the path of travel to the stop; however, the identified deficiencies point to the need for additional funding in this category.

OM-1), San Diego Pacific Highlands Ranch (East of Carmel Valley Road and Del Mar Heights Road) (SD-PHR-1), San Diego Torrey Highlands (North side of SR 56 and Camino del Sur) (SD-THD-1), San Diego Uptown – San Diego Avenue (from Old Town to Washington Street and India Street from Washington Street to Palm Avenue) (SD-UP-3), Santee, Cuayamaca Street (between Mission Gorge Road and Prospect Avenue) (ST-2), Santee, Magnolia Avenue and Mast Boulevard (ST-3), Santee- Mission Gorge Road and West Hills Parkway (ST-4), County of San Diego- Lakeside-Bostonia (CN-7), County of San Diego, Jamacha Boulevard (at Sweetwater Springs) (CN-10).

⁷ Carlsbad, Plaza Camino Real (at State Route 78 and El Camino Real Carlsbad) (CB-2), Carlsbad, Quarry Creek Area (at Marron Road and north of Tamarack Avenue) (CB-3), Escondido, Citricado Parkway and Centre City Parkway (ES-6), San Marcos, Rancho Santa Fe Road (between Mission Road/South Santa Fe Road and San Marcos Boulevard) (SM-7), San Marcos- San Elijo Hills (at San Elijo Road and Elfin Forest Road) (SM-8), Vista, East Vista Way/Foothill (VS-6).

CONVENIENCE OBJECTIVES

Five of the regional transit goals relate to developing a transit system that is convenient for users and potential users. The goals in this section all relate to convenience but note that different levels of service are appropriate for different markets or zones.

The span of service guidelines define the times that transit service will be provided. For the Urban Zone, the objective is to ensure that service is convenient and can accommodate travel during most hours of the day. In the suburban zone, the emphasis on providing excellent commuter services in major corridors is backed by a guideline to provide a limited network of lifeline services. In the rural areas, the policy objectives and guidelines only contemplate lifeline levels of service. The MTS and NCTD Boards of Directors also may decide to provide higher levels of service in specific areas where there is higher ridership or special market conditions.

The frequency of service also influences people's modal choice. The urban core is the area that requires and can support a high-level of frequency that will enable passengers to travel spontaneously. The COA has developed an extensive network of routes with headways of 15 minutes or better in the urban zone. Experience in San Diego and elsewhere shows that better headways almost always result in more riders.

The minimum regional service headway goals are set at 20 minutes for bus and 30 minutes for rail, consistent with the vision of the RTP. With the additional investment described in the 2030 RTP, the headways will be enhanced in future plans with the goal of bringing bus services in key travel corridors up to the service goal of 15 minutes or better for all-day service. The current goals recognize the high cost of reducing rail headways below 30 minutes and take into account current funding or facility limitations.

Objective 1 To provide an appropriate span of service to bus stops based on the zone designation.

Guideline Percentage of stops that have transit service within the specified timeframes for each zone and day of week (weekday/Saturday/Sunday) that are at or above the thresholds included in Appendix L.

Results Both agencies did not meet weekday guidelines for this objective. It is recognized, however, that limited financial resources have an impact on reduced service spans at "shoulder" time periods where service is less efficient.

Objective 2 To provide frequency appropriate for spontaneous travel on major corridors and convenient travel to all parts of the urban core.

Guideline Minimum headways expressed in minutes that are at or below the thresholds included in Appendix L, which vary by service type, zone, and time of day (peak/off peak).

Results Updated GIS files were unavailable for FY 2010 and 2011. However, the performance results for the frequency performance measure were mixed in FY 2009, with both MTS and NCTD exceeding several frequency thresholds. The results show that, while the service guidelines are certainly reasonable expectations for our transit system, funding for public transportation in the region is not sufficient for MTS and NCTD to provide this desired level of service.

RELIABILITY AND SPEED OBJECTIVES

Reliability and speed are very important to existing and prospective transit users. As such the transit service goals recognize the importance of reliability and maintaining or improving travel times. The reliability objective provides a link between the published timetables (promised service) and actual service operated on the road⁸.

The guideline for local and community bus service was lowered to 80 percent in the 2008-2012 Coordinated Plan from 95 percent. This was done to reflect experience from other transit agencies that have shown that the previous manual schedule adherence-checking often overstates reliability, and to distinguish local and community buses from regional and corridor cars where greater reliability is expected due to use of reserved rights-of-way and priority systems. In future years, the guidelines can be adjusted as more data is received and analyzed. The evaluation of completed trips also is included under the first objective since it is important to evaluate whether the overall transit routes are adequately serving the public. While on-time performance helps evaluate scheduling or congestion issues, this indicator quantifies maintenance or driver issues for vehicles that are taken out of service.

The guidelines for ADA paratransit meet federal rules that establish guidelines for ADA paratransit service. The federal law does not specify performance levels for missed trips or schedule performance, but does require a high level of service be provided. MTS considers an Access trip to be on time if the passenger is picked up within a 10-minute window surrounding the promised pickup time. NCTD considers NCTD LIFT to be on time if the passenger is picked up within a 20-minute window.

The second objective is to ensure that transit services do not lose speed over the course of the evaluation period. Slower services cost more in operating expenses and are less attractive to passengers. It becomes increasingly difficult to maintain service speed in the face of growing traffic congestion; however, implementation of transit priority measures can mitigate this problem. Deficiencies in this area can point to the need for additional funding for signal priority systems which can be developed through partnerships between Caltrans, SANDAG, various cities, transit agencies, developers, or other organizations.

⁸ Service reliability is a critical factor that influences people's modal choice. The automatic vehicle location (AVL) system now being installed on the transit fleet will provide useful data for evaluating the schedule reliability of the system. These guidelines are consistent with the capabilities of the electronic data reporting that will be feasible with AVL.

Objective 1 To operate transit services that are reliable, offer competitive travel times, and adhere to published timetables or service intervals.

Guideline 1 Percentage of trips on time at departure, arrivals, and enroute timing points.

Results MTS met the 80 percent on-time guideline for regional and corridor services (including Premium Express Bus) in FY 2011, but fell shy of the guidelines for local and community bus service. NCTD met the 80 percent on-time guideline for its rail services (regional and corridor) but fell shy of the guidelines for local bus service by 1 and 4 percent.

Guideline 2 Percentage of completed trips.

Results MTS and NCTD met both guidelines for this objective for the categories with available data.

Guideline 3 Percentage of ADA trips with pickup within schedule window.

Results MTS and NCTD met the guidelines for this objective.

Objective 2 To maintain or improve existing average speeds on existing transit services within the geographical zones.

Guideline Average transit operating speed in each zone.

Results Both MTS and NCTD generally met the speed guidelines within 1 mile per hour with the exception of NCTD suburban service, which was 2 miles per hour lower than the guideline. This issue will be evaluated as the NCTD Mobility Plan is implemented.

ENVIRONMENTAL JUSTICE OBJECTIVE

This objective supports the federal environmental justice, federal Title VI legislation, and RTP equity goals articulated in Chapter 3.

Objective To ensure that transit service and amenities provided in minority and low-income census tracts are on average comparable to the level of service and amenities provided in nonminority census tracts.

Target Percentage of minority and low-income census tracts with transit service must not be disparately impacted when compared to the average level of service and amenities provided in nonminority census tracts.

Results An updated Title VI evaluation was conducted for FY 2011 and found that the transit operators provided service in minority and low-income census tracts that was equal or of better quality than service typically provided in nonminority and non-low-income census tracts. The results of this analysis are included in Appendix H.

COMFORT OBJECTIVE

This objective addresses the goal to provide appropriate service for the markets being served. One of the least welcomed aspects of public transit is the need to stand on board crowded, moving buses or trains during peak periods. Standing can be uncomfortable and is perceived by some passengers as being unsafe, particularly for Express/Bus Rapid Transit services operating at freeway speeds. In extreme conditions, standing also may be the result of crowding that exceeds the comfort level in terms of personal space. People are generally uncomfortable in an environment where they must stand shoulder to shoulder with complete strangers. As a result, most transit systems have policies that define the maximum capacity of bus and rail vehicles. This objective sets guidelines for transit occupancy based on standee density using available floor space.

This policy proposes to adopt guidelines for transit occupancy based on standee density using only the available floor space in the calculation. This requires the measurement of the floor area for each vehicle type in the fleet, but represents the only accurate means of measuring standee density. This indicator will require on-board observations. However, automatic passenger counting (APC) data, when it becomes available, will be used to highlight any routes not meeting the guidelines.

Objective Occupancy on board vehicles should be appropriate for the distance, speed, fare, and type of service being operated.

Guideline 1 Density of standees per square foot of available standing area.

Results Data is not yet available to measure this objective.

Guideline 2 No peak-hour standees on regional and community services.

Results MTS and NCTD met the guideline for this service objective.

► **Specialized Transportation**

In the past SANDAG has had a very limited role in specialized transportation. SANDAG has coordinated the local process for awarding FTA Section 5310 money for elderly and disabled transportation. SANDAG also has overseen the CTSA for San Diego County and participated in some coordination strategies such as the FACT (Facilitating Access to Coordinated Transportation) Specialized Transportation Referral & Information database site and coordinated training programs for specialized transportation operators. As a result of Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), SANDAG was given the responsibility to develop a Coordinated Plan and to



administer grant program funding to agencies providing specialized transportation. This requirement was continued in Moving Ahead for Progress in the 21st Century or MAP-21. Additionally, the *TransNet* Extension Ordinance contained a provision for a Senior Transportation Mini-Grant program that also has increased SANDAG's role in specialized transportation services in the region.

SPECIALIZED TRANSPORTATION OBJECTIVES

The objectives outlined below are designed to provide the quantifiable outcomes for each of the goals related to specialized transportation from Section 3.2. As required by the Government Performance Results Act, the federal government has identified five indicators for measuring relevant outputs, service levels, and outcomes for each of its programs. It is the responsibility of the FTA to collect and report this data at the program level, and is not used to assess individual grants, however to remain consistent SANDAG has adopted these indicators for the purposes of the Coordinated Plan. Because of the close parallels of the goals of the Senior Mini-Grant program to these federal specialized transportation programs, indicators for projects funded through the Senior Mini-Grant program are included in this section with the detailed results included in Appendix L. Because of the wide array of projects funded through these specialized transportation grant programs with differing service parameters and associated costs, these indicators should not be used to analyze or evaluate the performance of individual projects or the grant programs.

NEW FREEDOM PROGRAM MEASURES

The New Freedom program is a federal program intended to improve mobility choices for persons with disabilities. The three measures established by the FTA for the New Freedom Program are:

Measure 1 Increases or enhancements related to geographic coverage, service quality, and/or service times for transportation services for persons with disabilities in the current year, to be measured by:

- ▶ Geographic area in square miles where services are being provided under the New Freedom program
- ▶ Enhanced service quality for disabled transportation
- ▶ Enhanced frequency of service for disabled transportation

Results The geographic coverage including operating projects in 30 zip codes and mobility management services in 120 zip codes. All projects to date have represented new projects and therefore there have not been any enhancements to service quality or frequency of service for existing programs funded through New Freedom.

Measure 2 Additions or changes to environmental infrastructure, technology, and vehicles that impact the availability of transportation services for the disabled in the current year, to be measured by:

- ▶ Improved infrastructure and technologies
- ▶ Improved vehicles

Results Two accessible vehicles were purchased with New Freedom funds in FY 2010 and FY 2011. No improved infrastructure or technology projects have been funded,

Objective 3 Actual or estimated number of rides (as measured by one-way trips) provided for individuals with disabilities as a result of the New Freedom projects

Results The number of one-way trips provided under the New Freedom program was 7,435 in FY 2009, 11,172 in FY 2010, and 12,204 in FY 2011. Additionally, for mobility management projects, 26,041 units of service were provided in FY 2010 and 20,483 in FY 2011.

JARC PROGRAM MEASURES

Job Access and Reverse Commute (JARC) is a federal program intended to improve mobility choices for employment related travel for reverse commuters and persons of limited means. The two measures established by the FTA for the JARC Program are:

Measure 1 The actual or estimated number of jobs that can be accessed as a result of geographic or temporal coverage of JARC projects implemented.

Results The estimated number of jobs that can be accessed as a result of JARC projects in FY 2011 were 349,590.

Measure 2 The actual or estimated number of rides (as measured by one-way trips):

Results The number of one-way trips provided by JARC projects was FY 2010 was 1,163,245 trips and 1,201,428 in FY 2011. Additionally in FY 2011 a mobility management project delivered 407 units including individuals receiving travel training and assistance with route planning.

SENIOR MINI-GRANT PROGRAM MEASURES

The Senior Mini-Grant program is a local program funded through the *TransNet* Extension Ordinance. SANDAG has included the requirement that all projects funded through the Senior Mini-Grant program be included in the Coordinated Plan, similar to the SAFETEA-LU federal requirements under the JARC and New Freedom programs. The program and evaluation criteria were developed with stakeholder input and through this process, a performance indicator was

established to measure the performance of projects funded under this program. The measure established for operational projects funded by the Senior Mini-Grant program is:

Measure 1 The actual or estimated number of rides (as measured by one-way trips):

Results 53,656 trips one way trips were provided through Senior Mini-Grant funded projects in FY 2010 and 70,898 one way trips were provided in FY 2011.

Objective 1 To evaluate the cost-effectiveness of a project, to be measured by:

- ▶ Operating cost in dollars per passenger

Results The operating cost in dollars per passenger was \$32.50 in FY 2009, \$21.55 in FY 2010, and \$20.11 in FY 2011.

▶ Specialized Transportation Project Monitoring and Reporting

With the responsibility of coordinating the local process for awarding and providing grant money for the local and federal specialized transportation programs, SANDAG has developed a consolidated approach to monitoring the projects funded through these programs. This monitoring program is specifically laid out in the Program Management Plan, which is available on the SANDAG website at <http://www.sandag.org/CoordinatedPlan>. SANDAG developed a Monitoring Checklist that assesses the project's compliance with the terms of the grant agreement and the project delivery. As part of the Monitoring Checklist, SANDAG measures that grantee's progress towards project delivery by measuring the cost per unlinked one way passenger trip (or other measurable unit of service) and comparing it with the cost per unit original proposed by the grantee in their grant application. The Monitoring Checklist is completed during site visits performed for all grantees at regular intervals.

SANDAG also monitors the projects on an ongoing basis through the progress reports that are required to be submitted with each invoice packet in order to be eligible for reimbursement. SANDAG uses the information from these report forms and associated data along with information from site-visits to report on the performance of the grantees and the programs as a whole to stakeholders annually. The performance report (also available on the website) includes a qualitative assessment of each of the projects and their progress along with a quantitative analysis related to the level of service provided and the cost per unit, in comparison to the grantee's proposal. This performance report is annually presented to the Social Services Transportation Advisory Council, Independent Taxpayers Oversight Committee, and Transportation Committee.

- ▶ Operating Projects/Trip-Based Services
 - Total number of one-way passenger trips
 - Operating cost per trip
 - Geographical coverage
 - Number of targeted jobs (JARC only)

- ▶ **Mobility Management Projects**
 - Total number of service units provided
 - Operating cost per service unit
 - Geographical coverage
 - Number of targeted jobs (JARC only)

- ▶ **Capital Projects**
 - Total number of units added
 - Operating cost per unit
 - Number of targeted jobs (JARC only)

Additional indicators, such as operating cost per revenue-hour and passenger seat utilization, and evaluation for capital projects will be added in future years per the guidelines list in the previous section.

Maps of the Job Access & Reverse Commute (JARC), New Freedom, and Senior Mini-Grant projects that received funding in 2011 are shown in Figures 3.2, 3.3, and 3.4. These figures only include service and route-based projects; other projects such as travel training and infrastructural improvements are not displayed on the maps.

Figure 3.5: New Freedom

Specialized Transportation Providers Funded Through the New Freedom Program (FY 11)

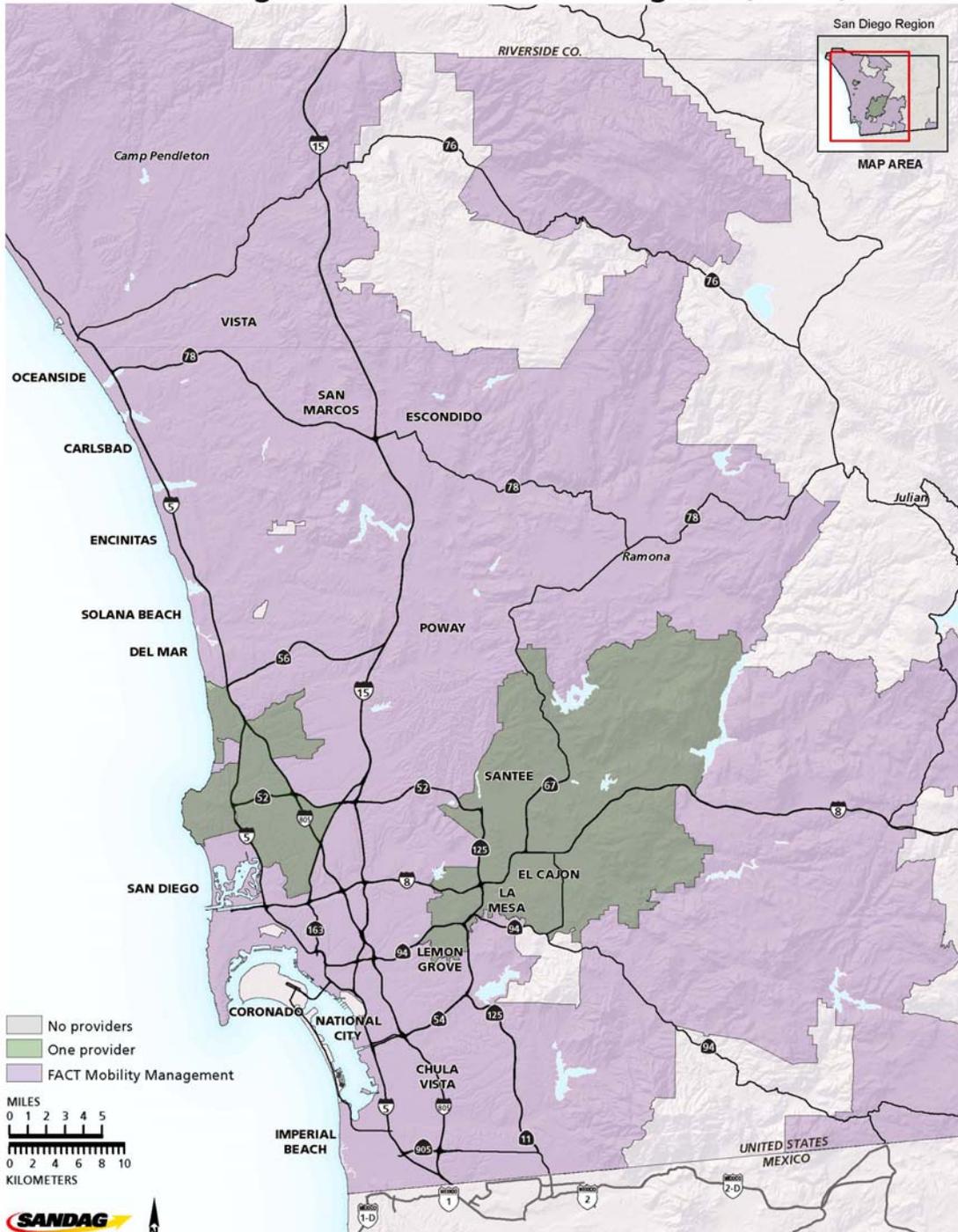
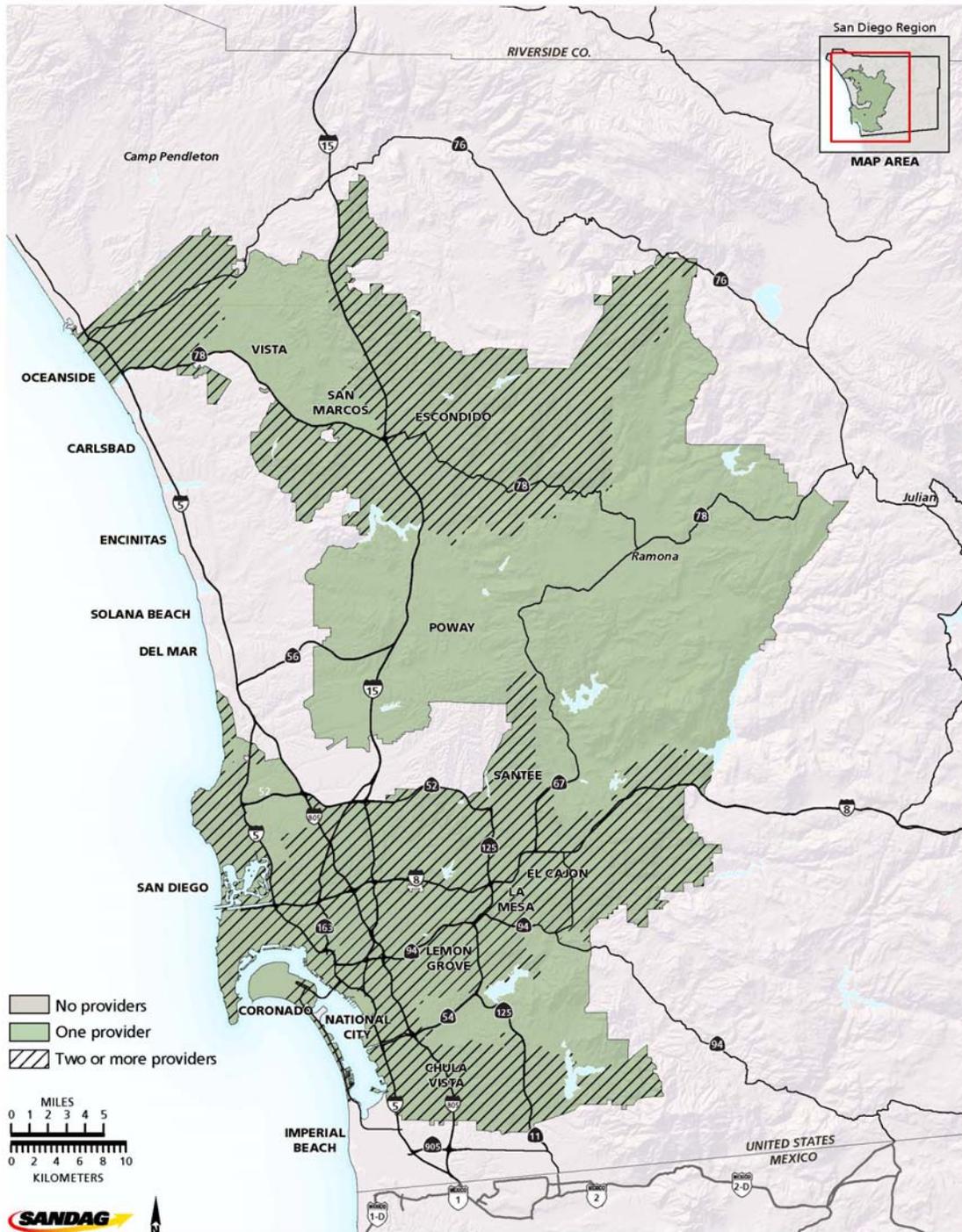


Figure 3.6: Senior Mini-Grant Program

Specialized Transportation Providers Funded Through the *TransNet* Senior Mini-Grant Program (FY11)



CTSA OBJECTIVES

The major initiative of SANDAG to improve transportation coordination among social service transportation providers has been the creation and funding of the CTSA. In 2006 SANDAG designated Facilitating Access to Coordinated Transportation (FACT) of Oceanside to be the CTSA for San Diego County.

The role of the CTSA is to improve transportation service that is needed by social service recipients by promoting consolidation of social service transportation, incorporating such benefits as centralized dispatching, combined purchasing of necessary equipment and supplies, centralized maintenance, centralized administration to eliminate duplicative administrative tasks, and consolidation of existing sources of funding. This consolidation results in more efficient and effective use of vehicles throughout the region.

The core mission of the CTSA is to assist seniors, persons with disabilities and social service recipients in San Diego County to meet their transportation needs.

Now that SANDAG has actively managed several grant recipients over the past several years, SANDAG can begin to evaluate the coordination of the various grant projects. The following objective was set by SANDAG to develop and encourage coordinated transportation.

Objective 1 To effectively advance coordinated access to the full spectrum of community transportation options for populations in need (seniors, persons with disabilities, and persons of limited means) through mechanisms such as mobility management, data tracking for unmet needs, vehicle brokerage, coordinated service, etc., to be measured by:

- ▶ Increase in the number of social service programs including, coordinated transportation as an integrated component.

Objective 2 To fulfill the scheduled tasks and activities as identified in the CTSA contract between SANDAG and FACT (Contract No. 5000644) as follows:

- ▶ Maintain an information and referral web site;
- ▶ Provide information and referral assistance on transportation for seniors, persons with disabilities, and other transportation disadvantaged populations;
- ▶ Organize trainings for the community;
- ▶ Maintain an active (minimum four times per year) advisory council of the CTSA (CAM) that can serve as a forum for local health and social service transportation agencies to coordinate and disseminate information on specialized transportation;
- ▶ Develop an annually updated strategic business plan;
- ▶ Maintain an inventory of existing resources;

- ▶ Coordinate surveys;
- ▶ Maintain a CTSA mailing list;
- ▶ Provide newsletters, brochures and other information materials;
- ▶ Report on actions and activities of the CTSA;
- ▶ Ensure that at least 50 percent of the FACT Board of Directors is comprised of officials elected to municipal or county positions in San Diego County, including one member who is a sitting member of the SANDAG Transportation Committee;
- ▶ Work with SANDAG on the development and updating of the Coordinated Plan;
- ▶ Conduct quarterly workshops and safety roundtables;
- ▶ Assist with the federal capital grant process;
- ▶ Maintain a supplemental transportation programs best practice library;
- ▶ Give community presentations and technical assistance;
- ▶ Identify partnerships between public and private services;
- ▶ Facilitate combined purchasing to achieve cost savings among providers of social service transportation;
- ▶ Provide consolidated driver training for social service transportation providers;
- ▶ Coordinate centralized maintenance of vehicles;
- ▶ Provide transit travel training;
- ▶ Conduct ADA paratransit/alternative transportation training;
- ▶ Provide centralized dispatch of vehicles for social service transportation providers;
- ▶ Develop an administrative model that would eliminate numerous duplicative and costly administrative burdens;
- ▶ Identify and consolidate existing sources of funding for social service transportation service to provide a more effective and cost efficient use of scarce resources;
- ▶ Ensure that local elected officials are involved in developing local actions necessary for the success of the CTSA;

- ▶ Participate in regional disaster preparedness planning for coordinated emergency evacuation; and
- ▶ Identify target area for deployment outside the pilot project area.

3.4 TDA Productivity Improvement Program and Performance Monitoring

Another component of the transit monitoring process is the Transportation Development Act (TDA) productivity improvement program and performance audit, which is included in the Coordinated Plan. This program is updated and evaluated annually so that SANDAG may distribute state TDA monies to the transit agencies.⁹ The productivity improvement program ensures that state and local requirements are met and that these programs improve the effectiveness and efficiency of the regional transportation system.

Pursuant to California Public Utilities Code (PUC) Section 99244, an operator can be allocated no more in FY 2013 than it was allocated in FY 2012 unless SANDAG determines that the operator made a reasonable effort to implement the productivity improvement recommendations adopted by the Board of Directors for the current fiscal year. This reasonable effort is developed through the evaluation of 3-year trend data and through a determination of whether or not those trends are positive.

The Productivity Improvement Program includes all of the performance measures explicitly stated in the state TDA Manual Section 99246(d). Additionally, SANDAG tracks multiyear trend analysis since it is recognized that steps taken by the transit agencies to improve system performance often take several years to be fully realized. The Productivity Improvement Program for FY 2012 included the evaluation of the following TDA performance measures over a three-year (12 quarter) period:

- ▶ Operating Cost Per Passenger (adjusted for annual inflation) – measures cost-effectiveness
- ▶ Operating Cost Per Revenue Hour (adjusted for annual inflation) – measures cost-efficiency
- ▶ Passengers Per Revenue Hour – measures service productivity
- ▶ Passengers Per Revenue Mile – measures service productivity
- ▶ Revenue Hours Per Employee – measures labor productivity
- ▶ Farebox Recovery Ratio – measures service cost-efficiency¹⁰

These performance indicators are measured separately for fixed-route (MTS Trolley, MTS Bus, NCTD SPRINTER, NCTD COASTER, and NCTD BREEZE Bus), demand-based services (NCTD FLEX), and Americans with Disabilities Act (ADA) Paratransit services (MTS ADA and NCTD ADA).

The indicators help determine if the agency is obtaining the desired results from the system and if overall performance is improving based on updated regional strategies or service operation plans. Also, these indicators help the transit agencies determine where improvements can be made. These

⁹ The TDA provides funding for the region's public transit operators and for nonmotorized transportation projects and, as the Regional Transportation Planning Agency, SANDAG administers the TDA funds.

¹⁰ Based on the TDA Manual Sections 6633.2 and 6633.5, this measure includes the evaluation of the last four quarters of available data (Quarter 2 of FY 2011 through Quarter 2 of FY 2012).

improvements can be incorporated into each operator's Service Improvement Plan, which are included in the Coordinated Public Transit – Human Services Transportation Plan prepared by SANDAG.

Performance trends were evaluated in FY 2012 to determine whether the transit agencies improved their performance in light of external circumstances (e.g., fuel prices and reduced state funding levels for transit). To facilitate a greater understanding of each individual service (MTS Bus, MTS Paratransit, MTS Trolley, NCTD Breeze, NCTD COASTER, NCTD SPRINTER, and NCTD Paratransit), a composite index of the six TDA performance measures is included in the Productivity Improvement Program to help determine overall trends.

Appendix J includes the composite evaluation of each service from Quarter 2 of FY 2009 to Quarter 2 of FY 2012. The overall composite charts are followed by charts that specifically illustrate the percent change through the reporting period as discussed below.

► **MTS FY 2012 Performance**

The results of the FY 2012 MTS performance trend analysis indicate that:

- *MTS Trolley* performance declined by 4 percent based on the Quarter 2 FY 2009 to Quarter 2 FY 2012 analysis. The main reason for the slight decline was a 13 percent decrease in Trolley ridership over the three-year period, due primarily to the economic recession that led to large job losses in the San Diego region. As a result, operating costs per passenger have increased, and passenger productivity (passengers per revenue hour and mile) also declined. Despite the drop in ridership over the three year period, the trolley farebox recovery rate remained stable resulting in a recent four-quarter average of 51 percent. This farebox recovery is well above the 36 percent system average and almost double the national light rail average of 28 percent. This was largely due decreased operating costs coupled with a 4 percent increase in fare revenue over the evaluation period. Trolley ridership has begun to increase, with FY 2011 ridership up 3.8 percent over the previous year, and year-to-date ridership up 5.1 percent.
- *MTS Bus* overall performance improved by 1 percent through the Second Quarter of FY 2012. Factors contributing to the improved performance included large increases in productivity from a 10 percent reduction in revenue hours and miles without proportionately affecting ridership (which increased by 1 percent). Bus ridership had a year to date FY 2012 increase of 5.9 percent. Overall improvements also were seen in labor productivity.
- *MTS ADA* overall performance declined by 13 percent over the past 12 quarters. Positive signs were seen in productivity (passengers per revenue mile and revenue hour). Additionally, operating costs slightly increased while ridership, revenue hours and revenue miles declined. The accounting process for overhead, however, changed during this time period. For fiscal years 2009 and 2010, overhead expenses were allocated as an annual amount in the fourth quarter of each fiscal year. Starting in FY 2011, MTS began allocating overhead monthly, so the beginning of the analysis period had no overhead costs. MTS also changed the cost allocation methodology used during this evaluation cycle. Each operator allocated costs using passenger count ratios in fiscal years 2009 and 2010. Since the small passenger volume within Paratransit does not accurately reflect the effort required to serve these passengers, the methodology for the cost allocation was changed to revenue miles. This spreading of the overhead costs created

a more equitable cost distribution among the operators but created a challenge in evaluating composite trends for the MTS ADA service.

- ▶ *MTS Farebox Recovery Rates* exceeded the minimum TDA requirements for fixed-route and ADA Paratransit services. TDA requirements include a minimum annual farebox recovery of: 31.9 percent for fixed-route rail and bus (41.1 percent was achieved); 20.0 percent for Premium Express (46.8 percent achieved); and 10 percent for MTS ADA services (13.3 percent was achieved).

▶ **NCTD FY 2012 Performance**

The results of the FY 2012 NCTD performance trend analysis indicate that:

- ▶ *NCTD COASTER* overall performance declined by 5 percent during the last 12 quarters due mainly to declines in ridership and passenger fares coupled with increased operating costs, revenue hours and Full Time Equivalent Employees (FTEs). However, despite high unemployment levels, ridership has increased over the last four quarters by 26 percent, as a result of several factors, including increased fuel prices, increasing traffic congestion, increased marketing efforts, and the reduction in passenger fares which was introduced in the Third Quarter of Fiscal Year 2011. It is important to note that while the overall composite performance is slightly down for the three year term, performance has been improving since the reduction of COASTER passenger fares.
- ▶ *NCTD SPRINTER* performance improved by 7 percent over the last 12 quarters. The SPRINTER performance improvement was primarily due to the decline in operating costs matched by increased passengers, revenue hours and fares. This yielded improvements in cost-effectiveness and productivity. Farebox recovery also was up 7 percent in the year-over-year analysis.
- ▶ *NCTD BREEZE* overall performance did not change over the 12 quarter evaluation period. Gains in cost-effectiveness were offset by slight reductions in farebox recovery. BREEZE farebox recovery, however, has improved by 2 percent over the last two years. Service and labor productivity held constant from the Quarter 2 FY 2009 to the Quarter 2 FY 2012.
- ▶ *NCTD ADA* service improved by 13 percent over the previous 12 quarter period. This was the result of large improvements in cost-effectiveness and productivity based on increased passengers (+8 percent), declining costs (-21 percent) due to the transition away from a dedicated fleet service model to a brokerage model, increased revenue hours (+10 percent) and increased fares (+1 percent).

NCTD Farebox Recovery minimum TDA requirements were exceeded for fixed-route and ADA Paratransit services. TDA requirements include a minimum annual farebox recovery of: 18.8 percent for fixed-route (25 percent was achieved); and 10 percent for ADA (13.7 percent was achieved) services.

3.5 TDA Performance Audit Recommendations

In addition to the three-year performance monitoring associated with the annual TDA claim, the triennial performance audit included the development of improvement recommendations for the transit agencies. The most recent performance audit completed in April 2010 included some recommendations on possible strategies to improve efficiency and effectiveness for both transit operators. These recommendations and the associated MTS and NCTD action plans to implement them (from Form B of the 2012 TDA Claim) were updated by MTS and NCTD and are included in Attachment J.

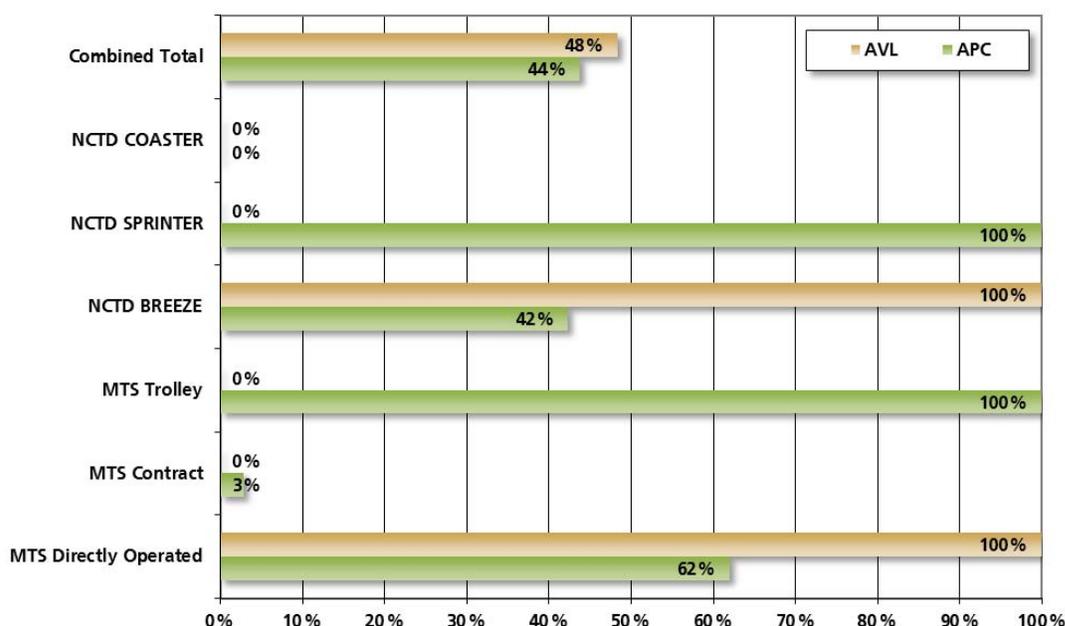
3.6 Technical Advancements and Automation

As outlined in this chapter, the Coordinated Plan provides a comprehensive performance analysis of transit service from the regional and passenger perspectives. However, as more detailed data becomes available from new technologies, this evaluation can be further expanded in future years. Automated and consistent data collection is critical to ensuring that performance is tracked over the five-year timeframe discussed in this chapter, including the three years outlined in the TDA section. The following section discusses the status of technical advancements and improvements to the data collection process expected over the next several years.

► Transit System

SANDAG, MTS, and NCTD rely on numerous tools for performance monitoring. The Regional Transit Management System (RTMS) is a sophisticated management tool for providing real-time performance monitoring and reporting. The RTMS relies on data from automatic vehicle locator (AVL) technology for real time vehicle location. AVL data is used for on-time performance monitoring, as well as real-time dispatch control.

Figure 3.5: AVL and APC Fleet Deployment (FY 2012)



The passenger counting program (PCP) provides stop-by-stop boarding and alighting information for every weekday trip, as well as a sample of weekend trips. The PCP relies heavily on manually collected data, but has recently been using data from APC units from a subset of the system. To increase the reliability of PCP data and reduce data collection costs, APC units will be purchased on most new vehicles and retrofitted on older buses and rail cars. The long-term goal for the region is to have 100 percent of transit vehicles equipped with APC units.

Figure 3.5 shows the percentage of vehicles (in some cases purchased but not yet deployed) with AVL and APC technology within each fleet, as well as regionwide.

▶ **T-PeMS**

Planned improvements to the highway Performance Measurement System (PeMS) program (developed by U.C. Berkeley in cooperation with Caltrans) include the development and integration of transit (T-PeMS) and arterial (A-PeMS) modules. These features will allow PeMS to perform as a multimodal performance measurement and evaluation tool for the San Diego region. These improvements will supplement the SANDAG transit performance monitoring program over the next several years by providing the ability to gather, track, and analyze real-time transit data.

The Coordinated Plan



Chapter 4



An Assessment of Public Transit and Specialized Transportation Needs

CHAPTER 4: AN ASSESSMENT OF SPECIALIZED TRANSPORTATION AND PUBLIC TRANSIT NEEDS

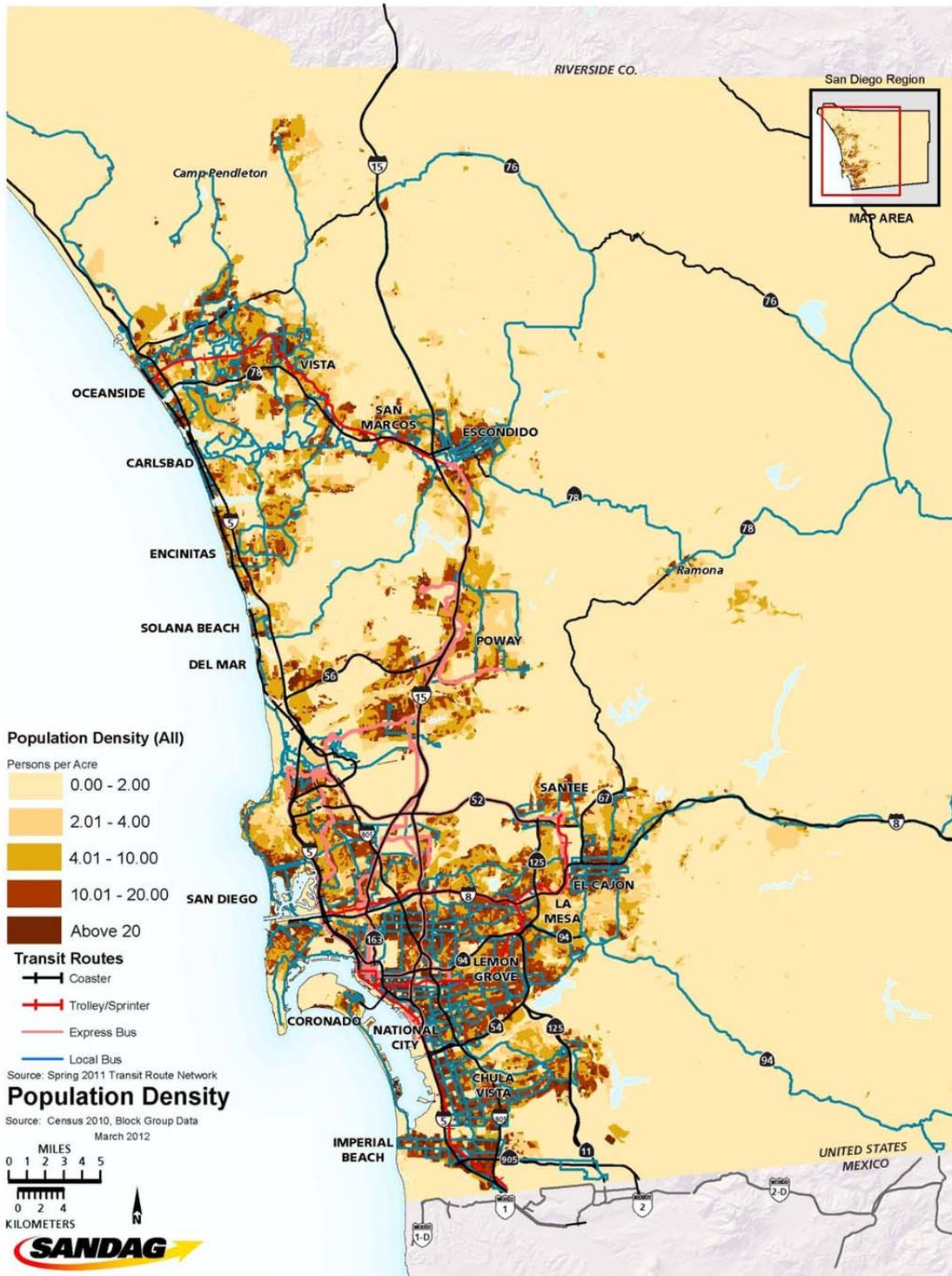
The San Diego region's transit system meets the needs of nearly 350,000 passengers daily and continues to provide mobility options for both the discretionary and transit-dependent rider. Today, the region spans 1,628 miles of transit service including light rail, heavy rail, and local/regional bus, all of which include ADA accessible vehicles. While fixed route and ADA paratransit services remain a cost-effective and reliable means of travel, transit is not always an appropriate, accessible, or applicable passenger option in the San Diego region. The Federal Transit Administration understands that in areas where local public transportation is "unavailable, insufficient, or inappropriate" specialized transportation programs present a viable means of providing the needed service¹. Additionally, a myriad of variations in transportation patterns and travel needs exist within different populations making it difficult to utilize transit. Specialized transportation programs help to bridge any gaps in service or need that public transit and paratransit is not able to fulfill. The following section outlines the types of populations most likely to utilize transit, and specialized transportation when transit is not appropriate or accessible. It is recognized that transit service can be a cost-effective choice, where available, as long as those services are sufficient and appropriate to meet the needs of the identified population groups.

While past Coordinated Plans have identified seniors, individuals with disabilities, as well as, low-income persons as transportation disadvantaged populations, this Coordinated Plan recognizes even further defined sub-populations within each community of concern. Whereas the senior population (age 65 and older) was once identified as a singular transportation disadvantaged group, a growing body of research suggests distinct differences in senior needs based on age within the senior grouping; the transportation needs of a 65+ year old are different from the needs of an 85+ year old. Additionally, other identified population groups were gathered from public outreach and feedback from, the Social Service Transportation Advisory Council (SSTAC) and Coordinated Plan Ad Hoc Committee (CPAG), and through the Consolidated Transportation Service Agency (CTSA).

This chapter identifies these sub-populations for planning and operating effective transit and specialized transportation services. Newly available Census 2010 maps are included in this chapter to display the distribution of transportation disadvantaged populations. A map of the general population is also included (see Figure 4.1) to help frame the discussion and to illustrate spatial differences between the overall population and the identified groups.

¹ U.S. Department of Transportation. "Elderly Individuals and Individuals with Disabilities Program Guidance and Application Instructions". Federal Transit Administration. Circular FTA C 9070.1F. 1 May 2007.

Figure 4.1: Population Density (All)



4.1 Identifying Specialized Transportation Populations

Federal ADA requirements mandate demand-based, curb-to-curb transportation assistance within three-fourths of a mile from a fixed route served by local transit to individuals who are not able to access or utilize public transit. For many individuals, their service needs expand beyond the basic ADA requirements in that they need, for example, door-through-door assistance (more personalized hands-on trip assistance) or are not able to make a reservation within the timeframe needed. (A description of ADA paratransit is provided in Chapter 5.) The following chapter provides detail of the unique groups that are most likely to utilize specialized transportation. While the groups mentioned below are not mutually exclusive (i.e. an individual who is a senior may also be recognized as low-income), for purposes of this plan each distinct community will be discussed independent of one another.

SENIOR NEEDS ASSESSMENT

For purposes of identifying potential projects and programs eligible for grant funding within this plan, seniors are recognized within this plan as being 65 years of age or older. The Senior Mini-Grant (a local funding source) recognizes seniors as individuals age 60 and older, while the FTA Section 5310 Elderly and Disabled Program (federally sourced) identifies older adults as age 65 or older.² Further, this plan subcategorizes this population into two groups: individuals aged 65-84 and those aged 85 and older.

With the first wave of Baby Boomers having reached retirement, the forecasted growth in senior population has become a reality. According to the Census 2010 data, individuals aged 65 years or older comprise of 11.4 percent of the total population in San Diego, while those aged 85 and older make up 1.7 percent of the entire population and represent 15.5 percent of the senior population (age 65 and older). Adults aged 65 and older totaled 351,000 people in 2010. Based on SANDAG demographic projections, by 2050, this number is expected to swell to more than double the 2010 population. Further, the group aged 85 and older will experience a steady increase with nearly 54,000 adults reported in Census 2010 and an expected 186,000 adults aged 85 and older in 2050, according to SANDAG's growth forecast. Figure 4.2 and 4.3 demonstrate the density of senior populations within the County. Though the Coordinated Plan only concerns a five year time frame, incorporating consideration for future demographic changes accounts for good planning practices and helps prepare for a sound future transportation network. Based on these projections, the San Diego region can expect an influx of seniors in the coming years and will need to accommodate and plan accordingly as this relates to transportation.

While the older adult population is continuing to grow at a rapid rate, seniors are also living longer and healthier lives compared to generations prior. Seemingly, as more individuals enter retirement, an increase in older, more mobile transit riders will be exhibited. For persons that are able to access transit, this will remain the most cost-efficient and productive use of existing resources. Furthermore, while in years prior, nursing homes were the norm for care facilities, today the demand by the 65 and over age group is for home-based and non-institutionalized care services that help to enforce a sense of self-reliance and independence. Transportation for this population must then consider a more individualized and rider-centric perspective.

² While the FTA specifies the senior age as 65+, *TransNet* specifies a 60+ age qualifier for senior transportation program funding. In order to allow projects to be eligible for either senior funding programs, analyses have been performed at the 65+ level.

Figure 4.2: Population Density of Persons 65+

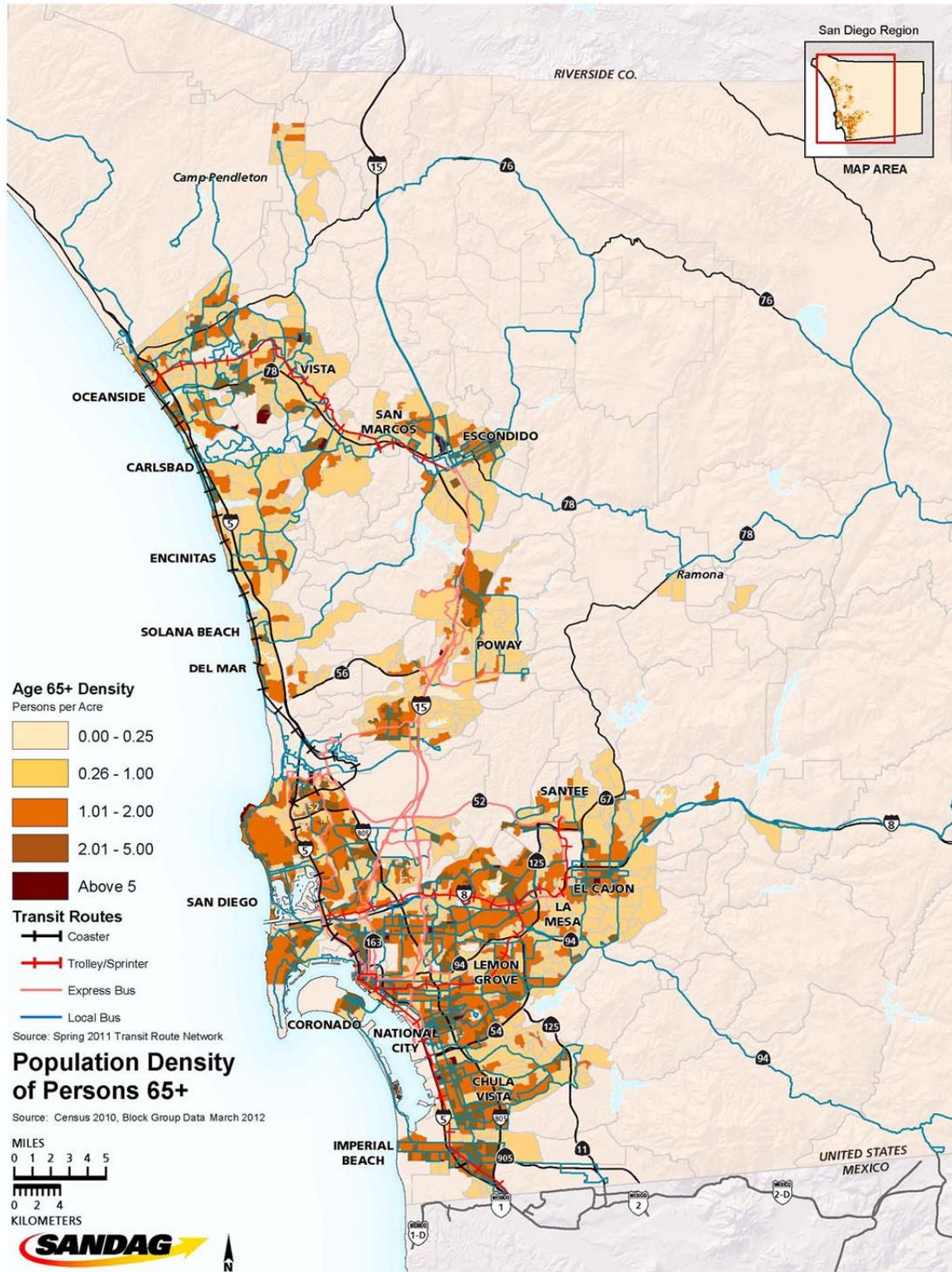
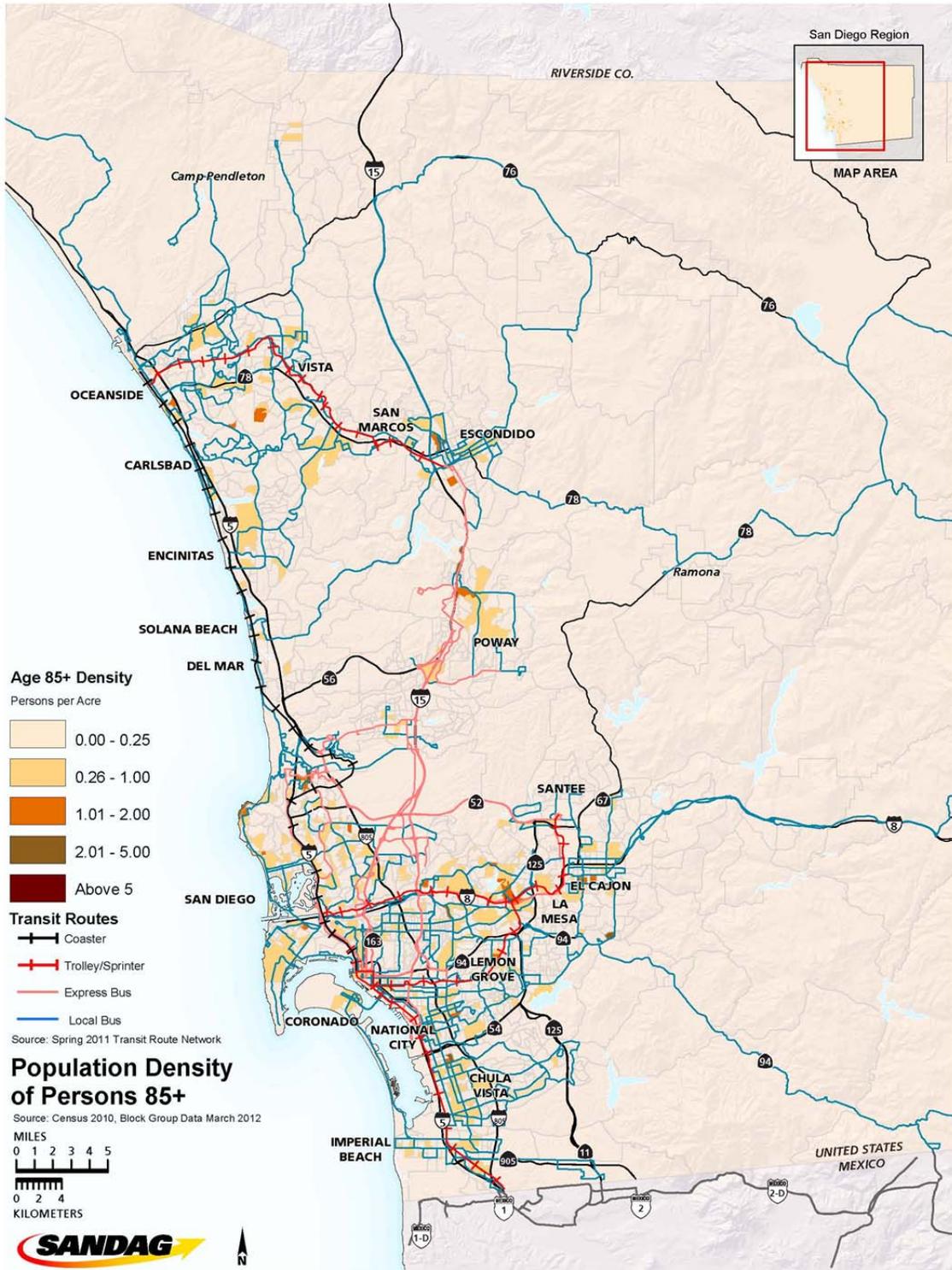


Figure 4.3: Population Density of Persons 85+



The following section identifies characteristics of the senior population that will help shape a more appropriately defined set of services along a continuum of changing mobility needs for an aging population.

► **Seniors Age 65 to 84**

While a growing proportion of seniors age 65 and over continue to exhibit a healthy and active lifestyle, the remaining individuals within this age group typically begin to experience a decline in cognitive, sensory, and physical functioning. The changes have direct impact on their mobility; loss of vision and hearing prevent many seniors from continuing to drive and force them to look for mobility options including transit systems and community based programs. As individuals age, they are more likely to experience: a loss in vision and/or hearing; exposure to temporary/chronic illnesses; an onset or continuation of cognitive impairments (dementia, Alzheimer's) and neurological disorders (Parkinson's, Multiple Sclerosis, etc.); an increased likelihood of using physical assistive devices; and any other special health conditions (including depression, cancer, etc.). To date, nearly one in eight older adults have at least one form of dementia and the numbers are continuing to rise³. Additionally, compounding the issues, older adults are likely to have limited opportunities to earn income as many seniors age 65 and older are retired and/or are living off a fixed income.

► **Seniors Age 85 and Up**

Individuals aged 85 and older typically experience an increase in the severity of cognitive, sensory, and physical issues, and are more likely to require supplemental caretaking and aid from family, friends, and service-providers. All developments, disorders, and impairments mentioned above are typically heightened in this age range. As the years advance, people are more likely to become incrementally more physically frail (due to aging) and may possess an increasing inability to complete daily tasks without assistance. Individuals aged 85 and older are also more likely to be effected by a mental/cognitive disease affecting their communication, will, health, and overall sense of well-being. Therefore, this population group (more so than adults aged 65 and older) is less likely to drive, meaning that public transit and especially specialized transportation become critical to meeting their mobility needs.

Service Parameters

The distinct types of trips needed by this group range from both emergency and non-emergency medical, nutrition-based, and social (visiting family, seeing a play, etc.). As many seniors are recent retirees, the need to maintain a strong social network is critical. Trips for work or volunteering are increasingly more common in such populations as older adults continue to assume roles as civic and community leaders and relish in reinventing themselves post-retirement.

Transportation needs for this group vary by ability, disability, and capability. As mentioned above, persons age 65 and older who exhibit limited physical, cognitive, or sensory impediments would typically be able to utilize transit, if available, to meet daily travel needs. In keeping with the theme of reinventing oneself post-retirement, seniors could potentially act as transit liaisons/ambassadors, for example, that provide others (both seniors and non-seniors alike) with mobility assistance and information. In the case that transit is not a viable option, however, specialized transportation

³ Alzheimer's Association. "Alzheimer's Facts and Figures". http://www.alz.org/alzheimers_disease_facts_and_figures.asp

remains as a secondary option for seniors with significant mobility challenges. Seniors age 85 and older are more likely to need lift-accessible services often provided within specialized transportation programs (including ADA paratransit).

Generally speaking, senior mobility planning involves, at a minimum, consideration for travel training, door-to-door service, the option for a volunteer driver, flex/demand-based routes, and a reduced, low-fare senior discount program for transit, among other services. Where transit is available and appropriate, fixed route service is a reliable and cost-efficient means toward carrying out one's daily needs. As seniors begin to experience forms of decline (especially apparent in the 85 and older subcategory), become frail, and/or are affected by a disability or impairment, their respective transportation parameters are altered to include services that must fully accommodate their needs while considering a fixed-income budget.

INDIVIDUALS WITH DISABILITIES NEEDS ASSESSMENT

Individuals with disabilities are identified as any persons with physical, developmental (behavioral), visual, and/or hearing impairments. The 2000 Census data conveys that 28.4 percent of the San Diego region residents identified themselves as persons with disabilities (see Figure 4.4 for a density map of individuals with disabilities within San Diego). The needs of disabled individuals vary based on each individual's impairment. In all cases, however, transportation and the ease of access is a basic necessity in maintaining a higher quality of life which includes fulfilling basic daily needs, access to healthcare, education, and work, as well as improving/maintaining ones mental and physical well-being.

Persons with disabilities are often placed at a disadvantage in the case that their impairment may impede their placement in the workforce, as well as, their access to further education. This may lead to a higher number of unemployed, undereducated, and below-poverty level individuals, some of which are not only of-age, but also are willing to participate in such establishments. Providing appropriate transportation (including ADA paratransit) options for individuals to access medical, social, and work/education-related destinations is critical in addressing the needs of a population that is most likely either transit-dependent or reliant on other specialized transportation programs.

► Reduced-Fare Eligibility Requirements

Metropolitan Transit System (MTS) and North County Transit District (NCTD) offer reduced fares for seniors, persons with disabilities, and Medicare recipients on fixed route transit. Americans with Disabilities Act (ADA) specifies that all fixed route transit be equipped to accommodate non-ambulatory individuals allowing for LIFT-operated services, among other ADA requirements discussed in fuller detail in Chapter 5. While paratransit remains a viable option for individuals, it is an expensive service for those on a fixed or restricted income. Transit operators make discounted fares available to passengers who are able to utilize fixed route transit. In order to benefit from such reduced fares, the transit agencies require an application process (unique to each transit agency) to determine eligibility. A description of these processes is identified in the following paragraphs.

MTS offers discounted fares to seniors (age 60+), disabled individuals, and Medicare recipients using fixed route Trolleys and buses. Additionally, MTS extends this offer to veterans with a disability

rating of 50 percent or greater⁴. In order to receive the discounted fares, passengers must present proper identification⁵ on buses and/or to the MTS Transit Store, Albertsons, and other participating outlets. Passengers wishing to purchase discounted fares at Ticket Vending Machines may only buy a one-way Trolley fare or a monthly product which is reloaded onto existing Senior or Disabled Compass Cards. For persons interested in receiving a Reduced Fare Compass Card, depending on whether or not one has proof of the qualifying identification, one must complete a short or long form. The short form is to be used by individuals that possess valid and qualifying proof of identification, while the long form exists for those with medical disabilities who do not have such proof. The long form fully describes the conditions and qualified disabilities eligible for the reduced fare identity card. The application process requires completion of the Physician's Statement of Medical Disability Eligibility by a physician or licensed health care professional.

NCTD offers Reduced Fares for three different population types: seniors (age 60 and older), persons with disabilities, and Medicare Recipients⁶. Applicants interested in receiving the Reduced Fare/Disability ID Card must demonstrate a physical or mental impairment as identified by NCTD in Section 2 of the application discussed below, and must also prove that the described condition "substantially limits one or more of the major life activities...defined as being able to care for one's self, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, work." The Reduced Fare ID Card may be used to purchase a discounted Regional Senior/Disabled/Medicare (SDM) Monthly Pass for the BREEZE bus and/or a SDM Monthly pass for the COASTER train.

In order to receive a NCTD Reduced Fare I.D. Card one must complete an electronic application (found at www.gonctd.com) or pick up a hard copy of the application from the Oceanside Transit Store or the Escondido Transit Store (addresses below). Once completed, the application can be returned to either of these locations (or electronically, if by internet). Seniors must present a Valid Driver's License, Medicare Card (not a Medi-Cal Card), MTS Senior/Disabled I.D. Card (NCTD ID card is not necessary if one has a MTS ID), or a California Identification Card. Persons with disabilities must present valid proof of eligibility by displaying one of the following: MTS Senior/Disabled I.D. Card (NCTD ID card is not necessary if one has a MTS ID), Medicare Card (not a Medi-Cal Card), Department of Motor Vehicles disability placard receipt, Social Security Insurance award letter, or a Veterans Administration letter confirming a disability of 50 percent or greater.

- ▶ Oceanside Transit Store at the Oceanside Transit Center Customer Service
205 South Tremont Street, Oceanside, CA 92054

- ▶ Escondido Transit Center
700 W. Valley Parkway, Escondido, CA 92025

⁴ The Cal.Pub.Util. Code § 99155(b) states that veterans with a disability rate of 100 percent are eligible for reduced fare.

⁵ Proper identification includes the following: Driver's license (for seniors), Medicare card, Valid MTS Senior/Disabled ID card, Valid NCTD Senior/Disabled ID card, State of California DMV Placard ID (the white placard receipt from the DMV), State of California Senior ID card.

⁶ Personal Care Attendants (PCAs) ride free on LIFT paratransit, BREEZE buses, and SPRINTER trains when accompanying a person who is ADA certified to use LIFT services. Passengers utilizing the LIFT services with the assistance of a PCA need to present a NCTD paratransit Reduced Fare I.D. Card with the "PCA-Yes" symbol on it. The PCAs Ride Free on Fixed Route Program is not available on the COASTER or San Diego (MTS) buses.

► Curb-to-Curb Eligibility Requirements

The ADA requires an eligibility process for those individuals interested in utilizing the paratransit service. Within the process, the ADA identifies specific guidelines to determine who may utilize the services. MTS and NCTD offer two distinct paratransit services (Access and LIFT, respectively) to individuals who are functionally unable to utilize fixed route transit. Both MTS and NCTD contract with ADARide (www.adaride.com) to determine the eligibility of applicants interested in utilizing paratransit in the San Diego region.

The application process for curb-to-curb paratransit service can be accessed through ADARide directly or through the respective service provider given one's origin/destination. The application process is free and requires a valid mailing address, as well as the recommendation by a healthcare professional⁷ (of one's choice) to support the application process. Concerning the application itself, the applicant must complete a series of questions that help the evaluator assess the current condition and travel needs of the potential paratransit user. The application is then reviewed by an ADARide evaluator who takes into consideration the applicants reported condition, recommendation per the healthcare professional, home environment including local weather and terrain, bus accessibility, as well as identified inaccessible areas and/or bus stops. Applicants are informed of the receipt of application once complete and are then notified by mail of the status of certification. Once certified, individuals may book ADA paratransit trips within three-quarters of a mile of an existing fixed route service.

While ADA paratransit caters to the individual needs of the passenger, the cost of the service is no more than twice the amount of the general passenger fare. Fixed route transit is a cost-effective and reliable means of travel where appropriate and applicable and furthermore, maintains the capacity to transport individuals requiring specialized accommodations with LIFT operated services. Further, passengers holding a valid NCTD issued Paratransit Reduced Fare Identification Card may ride BREEZE, or SPRINTER services without payment of any fare.

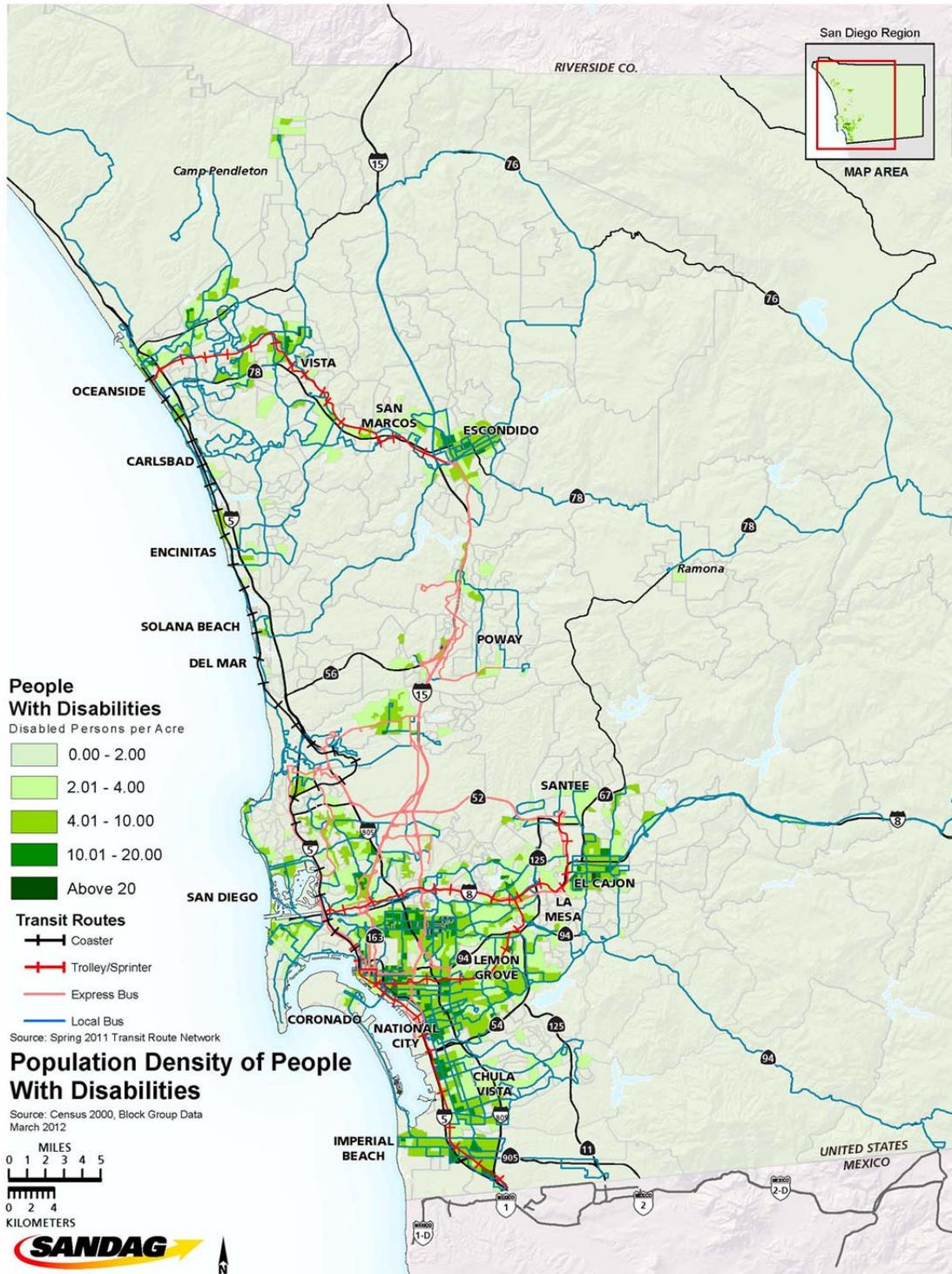
Service Parameters

Because there is a high correlation between persons with disabilities and individuals with limited means, transit is viewed as an attractive and cost-effective option. As Chapter 6 illustrates⁸, a majority of the persons with disabilities are within a half-mile proximity to a transit stop. Furthermore, complementary ADA paratransit service is available within a three-quarter mile distance from any transit stop which extends transit coverage beyond its regular fixed route service. However, as mentioned earlier, transit is not always an appropriate or applicable service. Specialized services accommodating for individuals with disabilities must consider a myriad of factors. Among other service parameters, a few considerations should include: vehicles allowing for physical assistive devices/guides, Personal Care Attendants (PCA); assistance with ride scheduling and travel training; sensitivity to long waits/long travel schedules and adverse weather conditions (as it may relate to medication reactions); protective infrastructure; among other accessible services that provides the passenger with a reliable source of transportation to assist one's daily activities and necessities.

⁷ An authorized licensed professional may include a physical or occupational therapist, nurse, social worker, orientation and mobility specialist, etc.

⁸ Please see Figure 6.4 for a map depicting a half-mile transit buffer relating to the disabled population density map.

Figure 4.4: Population Density of People with Disabilities



INDIVIDUALS WITH LIMITED MEANS ASSESSMENT

Many individuals that identify themselves as either being a senior or a person with a disability tend to have lower incomes. Persons living at 150 percent below the poverty line are recognized as “low-income.” Within the San Diego region and according to the American Community Survey 2006-2010 data for poverty, 21.0 percent of all residents are recognized as living within or below this threshold (see figure 4.5 for a map showing the density of low-income individuals within the region). Based on the poverty rates defined in the Federal Job Access and Reverse Commute (JARC) (Section 5316) program, an assessment of individuals whose income level is below the 150 percent poverty-line threshold is utilized for this plan. However, SANDAG also analyzes regional poverty of individuals living 100 percent below the poverty line in order to capture a broader perspective on the needs of San Diego’s residents. Table 4.1 represents a range of income levels, as it relates to poverty level.

**Table 4.1: San Diego County Population:
Income Levels Compared to Poverty Level**

Year	<100% Below Poverty Level		<150% Below Poverty Level	
	Persons	Percent	Persons	Percent
2010	361,248	12.3%	614,288	21.0%

Source: American Community Survey (ACS) 2006-2010, 5 year Summary. Ratio of Income to Poverty Level.

Service Parameters

Given the definition of a low-income individual for the purposes of this plan, persons of limited means typically include any group ranging from the homeless to students to refugees/asylum seekers to single head of households and more. The Results of the 2009 Onboard Transit Passenger Survey for the San Diego Region convey that 63 percent⁹ of transit riders are considered impoverished (living below 150 percent of the poverty line) and are most likely transit dependent (meaning no personal automobile is available for their trips). Working limited means individuals are often reliant on public transportation to meet their trip making needs. Additionally, low-income individuals typically work a non-traditional work schedule—working odd hours in the night and early morning, as well as on weekends. Compounding this issue, many households require that both heads of household (or singularly) contribute to the family’s income. Many transit trips typically include the transport of multiple children within one household as daycare is an added expense to budgets that are already stretched to and beyond their limit. Fortunately, as will be shown in Chapter 6¹⁰, the majority of households living below the poverty line live within a half mile distance to a transit stop. This presents an ideal opportunity for fixed route transit to meet these needs of this population. These individuals, however, require a flexible and efficient transit system that is capable of meeting their daily needs in a timely fashion given the typically high proportion of transit-dependent households in low-income areas (See Figure 4.7 for Zero Car Households in the San Diego region). A review of both the Low-Income (Figure 4.5) and Zero Car Household (Figure 4.7) maps showed a high correlation between these two groups.

⁹ From the survey, MTS reported 63.7 percent of transit riders living 150 percent below the poverty line; NCTD reported 60.1 percent of its riders as impoverished.

¹⁰ Please reference Figure 6.5 for the half mile transit buffer map of individuals with limited means.

While convenient access to transit service has been identified as a basic need, access to trip-planning resources, such as the internet or phone, also stands as an impediment for low-income individuals who may not be able to afford or access such services. Additionally, in conformance with Title VI, limited means individuals may also require materials to be produced in a language other than English.

The assessment of the population density for persons with limited incomes and place of employment is important since these individuals typically depend on public transit to meet their trip making needs. While Figure 4.5 demonstrates the population density of individuals considered of limited means, Figure 4.6 provides the location of jobs within the San Diego region. The major employment centers are located in the denser urban areas of South Bay, Downtown San Diego, Mission Valley, Sorrento Valley, Poway and Carlsbad. Upon comparing Figures 4.5 and 4.6, clusters of low-income populations are located in close proximity to the major employment centers with the exception of University City, Miramar, Kearny Mesa, Sorrento Valley, Poway and Eastern Carlsbad. Sufficient transit service is currently available to serve these given populations.

Figure 4.5: Population Below 150 percent Poverty Line

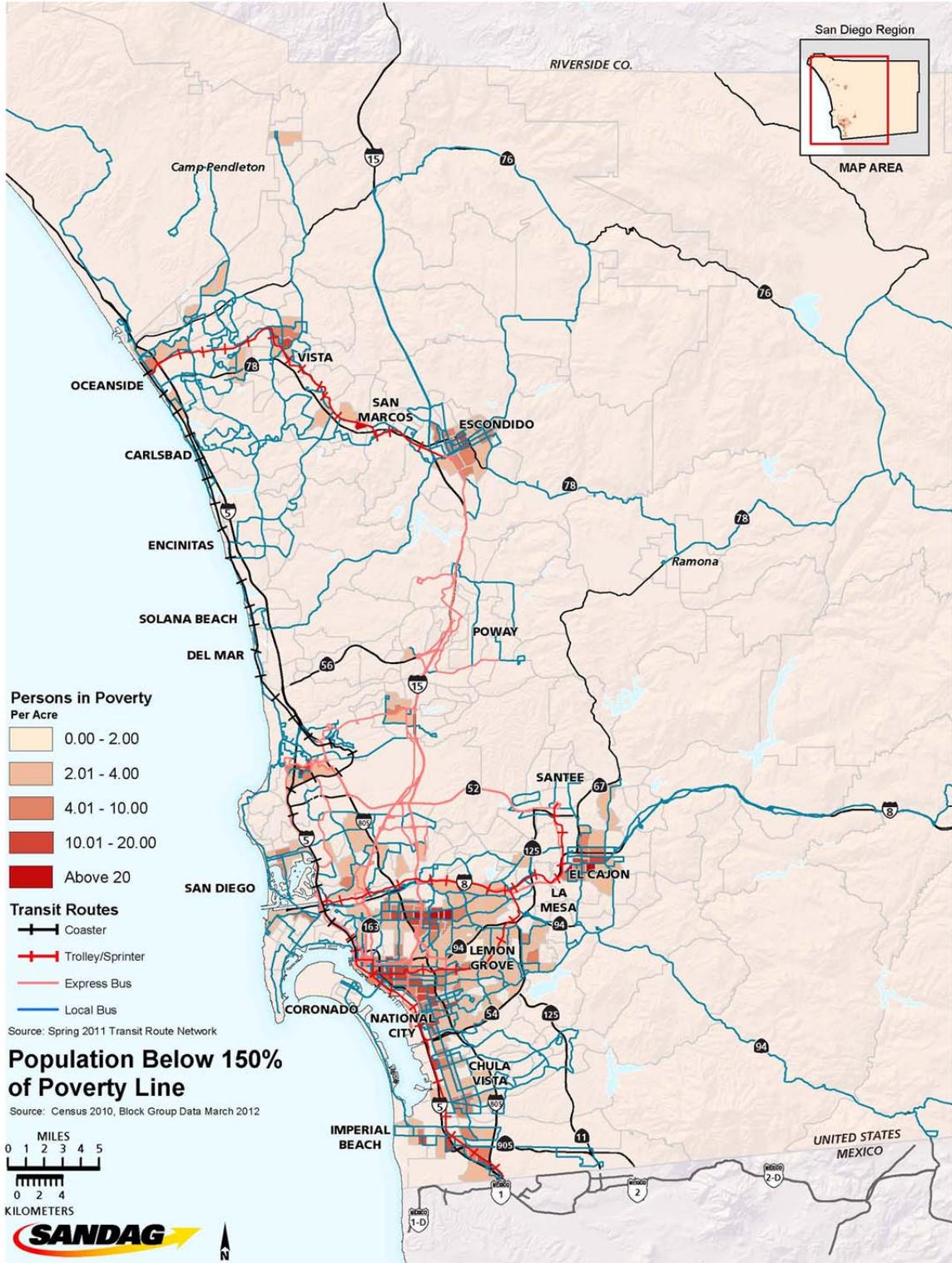


Figure 4.6: Job Density (Place of Work)

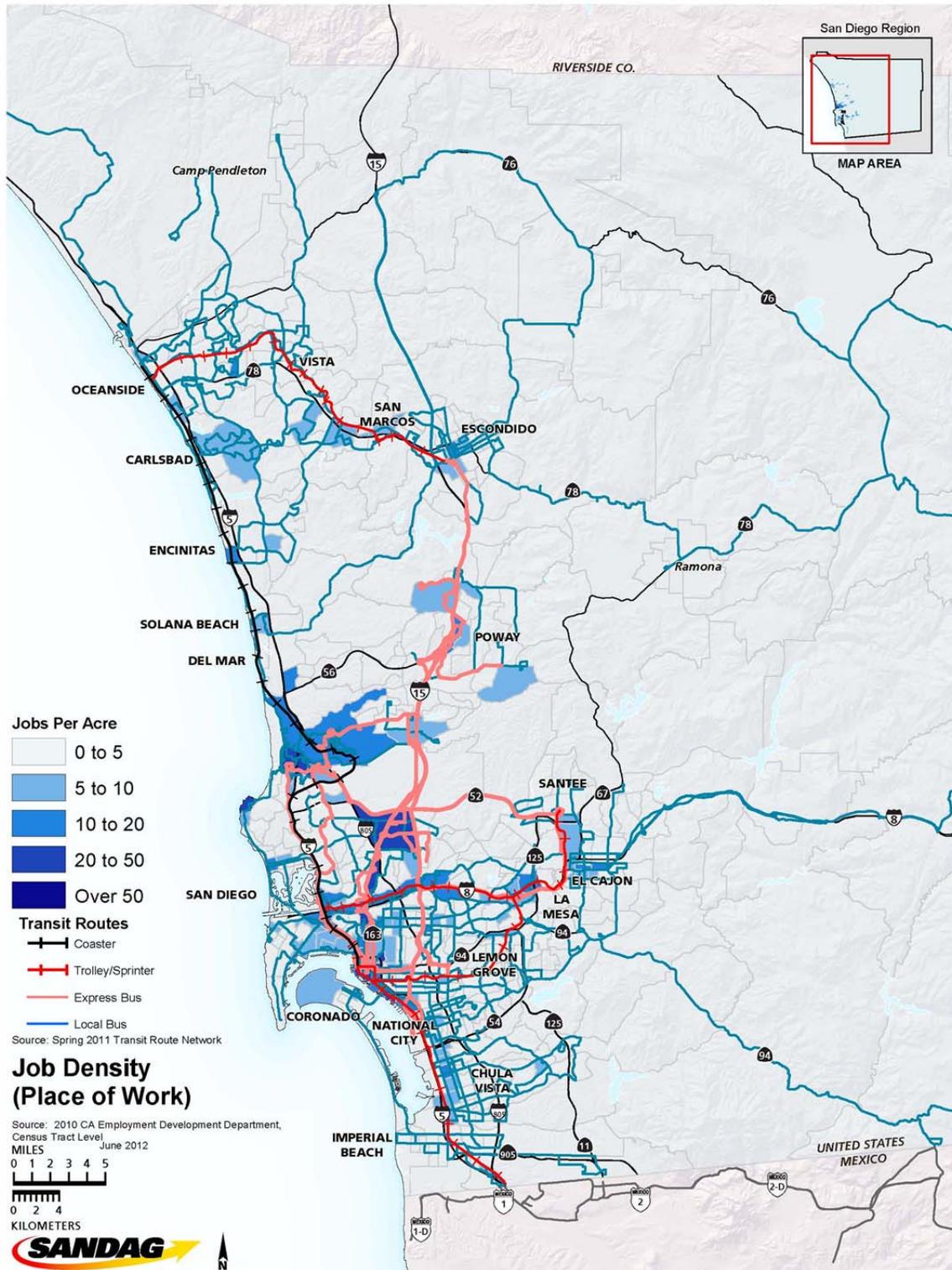
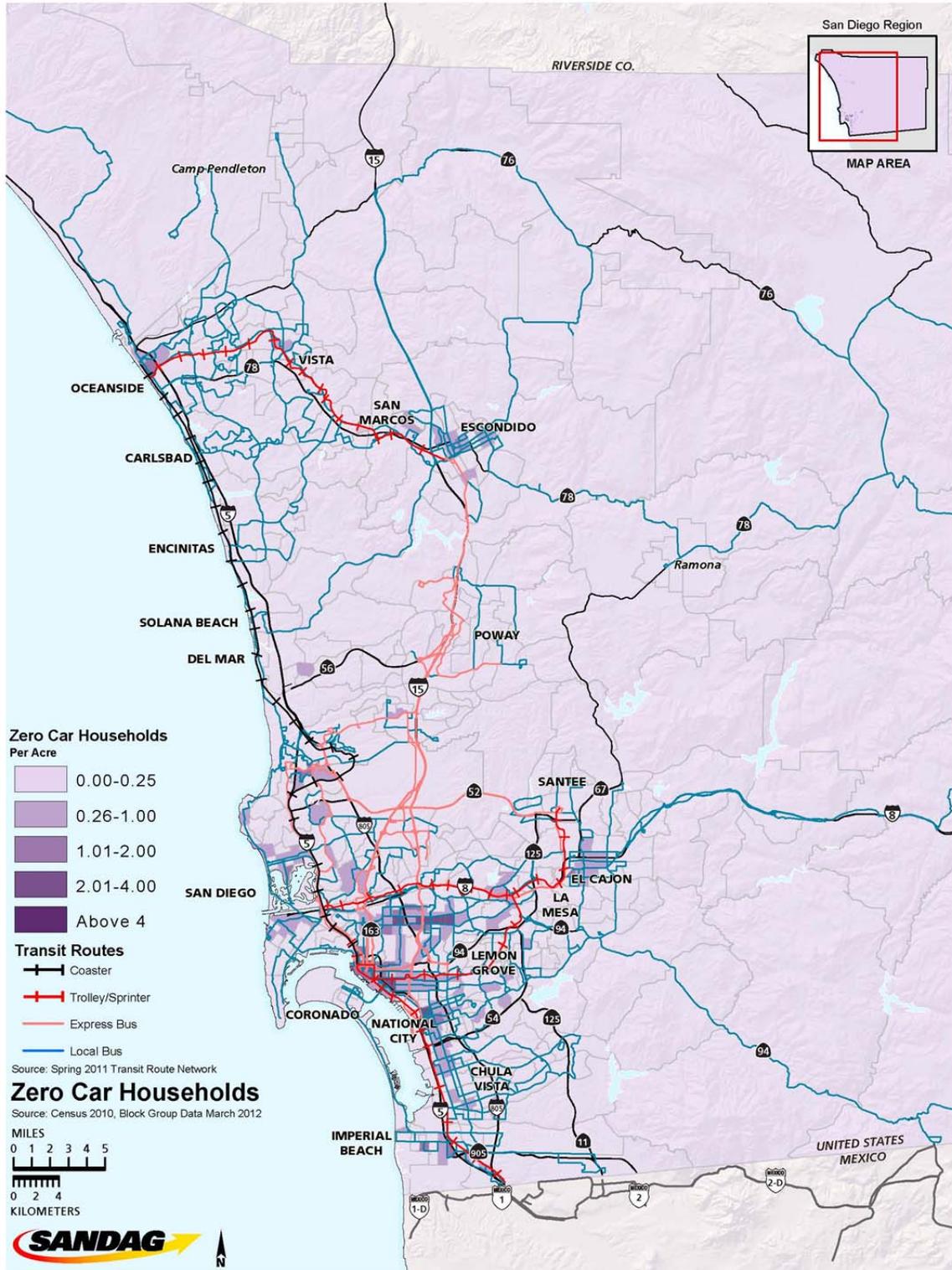


Figure 4.7: Zero Car Households



OTHER IDENTIFIED INDIVIDUALS

The aforementioned groups represent the bulk of individuals most likely to utilize public transit or participate in some form of specialized transportation due to age, ability, disability, or limited means. Though these populations mentioned above represent a large proportion of transportation disadvantaged communities, smaller groups with comparable needs are identified in this section. While other transit-dependent populations may exist, the following section, identified by SANDAG's CPAG and SSTAC, represents additional transportation-disadvantaged groups. The mention of these communities also is supported by the Federal Transit Administration's mission to equitably assist all individuals in the transportation decision making process by providing Limited English Proficiency (LEP) individuals the same participatory opportunities as non-LEP individuals. In specific reference to the Veteran population discussed below, in efforts to support SANDAG's partner agencies (most notably the region's designated CTSA) mission to maintain the most cost-efficient and productive network of service within the region, SANDAG supports and acknowledges the Veteran population's needs as described in the Veterans Transportation and Community Living Initiative (VTCLI) grant funding opportunity.

▶ Veterans

As of 2010, there were nearly two million veterans in the state of California. San Diego County, alone, is home to over 228,000 veterans. While a significant number of older veterans already reside in San Diego, an influx of newly discharged service members are projected to further add to the population. The need for services that will aid in their reintegration process into society is imperative. Integrating post-military service individuals into the workforce, family life, and/or society in general remains a federal and local objective and a host of organizations currently exist to provide support for younger and older veterans. Yet, with the expected increase in post-war service persons, an inevitable rise in assistive services (especially Medical-related) will need to be accounted for in future program developments. However, while services such as vocational counseling, work readiness assistance, post-secondary educational training, and other independent living services may exist, the willingness for veterans to participate in such programs, for one reason or another, is a continued obstacle for state departments and agencies. In so much as reluctance and stigma may be a deterrent for veterans seeking health care or other life-sustaining and life-enhancing activities, the availability of efficient and appropriate veteran transportation services stands as a pragmatic barrier.

Service Parameters

Individuals with service-connected disabilities may require access to healthcare, rehabilitative services, as well as other independent living services and job-related trainings. Service requirements for veterans should provide specialized care and related medical and social support. Veteran transportation programs should consider flexible and resource-efficient programs that strive to reach the multitude of needs experienced by this population. At a minimum, a program should assess the feasibility of vanpools, taxi-vouchers, public-private partnerships (between the Veteran's Affairs Medical Centers (VAMCs) and a local transportation provider), a mobility management component, and a provision of flexible routes and feeder services to transit. Service requirements may include lift-operated vehicles and flexible-route paratransit shuttles for immobilized and remote (rural) Veterans Affairs patients. Additionally, an appropriate service should integrate veterans with non-veterans while also supporting the individual needs of the passenger. As is the

case with most transportation programs, effective marketing that allows passengers to know what services are available to them is encouraged.

► **Refugees/Asylum Seekers**

Refugees and asylum seekers are individuals who had to flee their home due to war or persecution. San Diego County is home to the largest refugee and asylum seeker population in California. As newcomers to the United States, transportation access and mobility are recognized as vital components to an effective and successful resettlement process. The need for services and improved access is crucial in enabling refugees and asylum seekers to smoothly integrate into their new home. During this adaptive stage, they are more likely to experience a cultural shift as they are dealing with different cultural traditions, language barriers, amongst other issues that may impede access to healthcare, gainful employment, or access to other basic needs.

The Federal Transit Administration (FTA) requires that agencies, such as SANDAG, have a Language Assistance Plan (LAP) to help those with Limited English Proficiency (LEP). SANDAG is currently developing a LAP which will identify methods of communication with non-English speakers in the region. A critical part of this communication is with refugee and asylum seeker groups, who often find that knowledge of transportation resources is a major barrier to community integration. The inclusion of refugee and asylum seeker needs in the Coordinated Plan helps combine the specific transit and specialized transportation needs surrounding language for these groups and helps support the development of the SANDAG Language Assistance Plan.

Service Parameters

Asylum Seekers/refugees living within close proximity to transit are encouraged to utilize fixed route transit. Travel training and mobility assistance programs, in addition to multi-lingual assistance are key factors in providing efficient access to transit to aid in the adaptation process. Shuttles and vanpooling are also viable options.

► **Homeless Youth/Runaways**

Homeless youth/runaways (“homeless youth”) are individuals under the age of eighteen who lack parental, foster, or institutional care. This population is likely to face increased threats to both physical and mental health while living on the streets/shelters. Since the majority of homeless youth are under the driving age, transportation access to local shelters, refuge/assistance programs, medical facilities, as well as employment destinations is a significant concern for this demographic.

Service Parameters

Generally speaking, youth (under age 16) legally lack the ability to drive. Homeless youth, in particular, are significantly disadvantaged as they lack the means to pay for transit or other means of transportation. As transit is the most cost-effective option available to this group, the service parameters for this group involve connecting this population with the existing fixed route services and finding resources to subsidize the travel. Specific travel needs vary from accessing shelter, assistance programs, medical facilities, and where applicable, education/employment facilities. Transportation to these previously mentioned destinations is a critical component in the transitional process to more stable living conditions.

INTERGENERATIONAL PROGRAMS

The earlier portion of this chapter focused on identifying the needs and general characteristics of populations traditionally recognized as transit-dependent and transportation disadvantaged. While the needs of these individuals have been addressed, an effort has been made to discover opportunities that serve multiple population groups. This unique form of coordination can include programs aimed at multiple age or ability types. The opportunity to develop such “intergenerational programs” has increasingly been recognized throughout communities nationwide as a means to responsibly coordinate existing resources and strengthen communities. Intergenerational programs may include youth volunteer drivers, joint excursions to recreational activities such as movie theatres and beaches, transit buddy programs, etc. Transportation programs that utilize cross-generational components efficiently utilize financial (vehicles, maintenance, ride scheduling software, etc.) and human resources (volunteer drivers, travel escorts, etc.), while also promoting an exchange of talent and support. Such innovative programs can provide mentorship opportunities for the youth and emotional support and nourishment for the older adults, creating a symbiotic relationship for the individuals as well as the community at large. The integration of programs that support the interaction of generations despite income, age, or disability not only helps to address the identified service parameters in a coordinated manner, but also works to target social cohesion issues such as senior isolation.

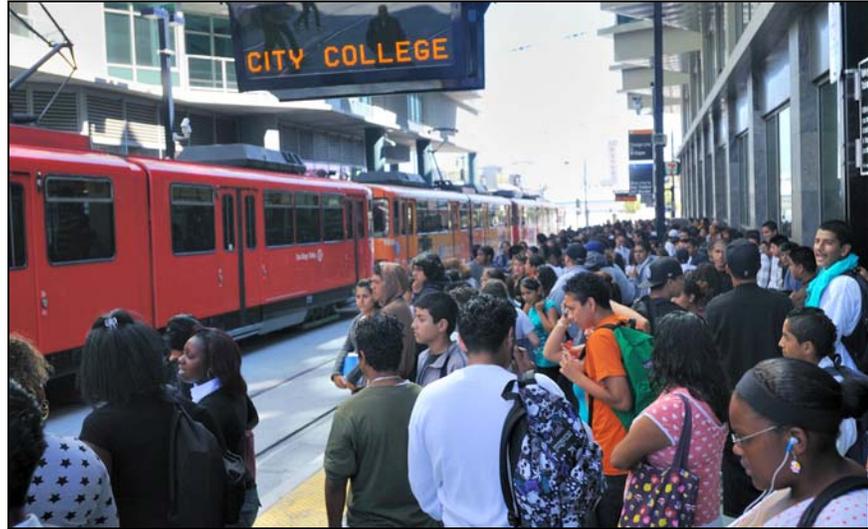
NEEDS ASSESSMENT SUMMARY

This chapter serves as a description of the transportation disadvantaged populations identified for program funding (Job Access Reverse Commute, New Freedom, and Senior Mini-grant), as well as identifies additional populations most commonly in need of transit and specialized transportation services. In SANDAG’s efforts to create an inclusive and holistic perspective of the transportation needs of the region, SANDAG will continue to research other groups, as well as additional funding opportunities.

The Coordinated Plan



Chapter 5



An Inventory of Available Public Transit and Specialized Transportation Needs

CHAPTER 5: AN INVENTORY OF AVAILABLE PUBLIC TRANSIT AND SPECIALIZED TRANSPORTATION SERVICES

San Diego is served by a network of transit and social service transportation options that respond and react to the growing needs of the region. Services operated by the Metropolitan Transit System (MTS) and the North County Transit District (NCTD) provide fixed-route and Americans with Disabilities Act (ADA) paratransit services for most of the region's population, focused on the urbanized areas. Where transit and paratransit are either, not available, sufficient, or available due to geography or passenger disability to access transit, specialized transportation programs help to fill the gap.

This chapter provides an index of the available public transit and specialized transportation services within the San Diego region. Research is drawn from the services offered by both MTS and the NCTD, along with information gathered from the 2012 Transportation Provider Survey as discussed in Chapter 2.

5.1 Public Transportation Providers

Public transit service in the San Diego region is provided by two agencies: MTS and NCTD. These two agencies provide services through a variety of directly operated and contracted services, including three fixed-route bus operators, San Diego Trolley Incorporated, NCTD Coaster commuter train service, and ADA paratransit operators. These operators provide service in the SANDAG area of jurisdiction covering 4,261 square miles and encompassing 18 incorporated cities and the County of San Diego. A more detailed description of the services provided by MTS and NCTD, along with route statistical information, is included in Appendices B and C. Additionally, MTS manages jitney licenses as described in this Chapter.

► ADA Paratransit

The Americans with Disabilities Act of 1990 prohibits discrimination and establishes equal opportunity and access for persons with disabilities. Transit service providers within San Diego, MTS and NCTD, comply by ADA regulations by making public transportation safe and accessible for all individuals. Among the established design principles that ensure access to transportation, ADA paratransit and dial-a-ride services are mandated for trips beginning and ending within three-quarters of a mile on each side of each regular fixed-route. Paratransit is unique in that it provides a curb-to-curb service for those unable to reach a fixed-route transit stop or station. ADA paratransit cannot exceed more than twice the full fare for regular fixed-route services. Additionally, paratransit allows for the option for a Personal Care Attendant (PCA) to travel at no charge.

► MTS ADA Paratransit

While MTS operates fully accessible vehicles in all of their fleets, MTS also offers a complementary paratransit service, "Access", for individuals with disabilities that are unable to use the regular fixed-route bus or Trolley services. Access, in complying with ADA regulations, provides curb-to-curb

service within three-quarters of a mile from a fixed route bus stop or trolley station within MTS's jurisdiction (with the possibility of transfers within the service zones). Applicants must be registered through MTS as eligible candidates for the service and tickets can be paid by cash or a unique prepaid ticket book. Trips may be scheduled at least two days in advance. In order to accommodate an effective demand-responsive schedule (and in compliance with ADA requirements), travel times may vary up to an hour either way from the requested travel time. Access's wheelchair accessible vehicles accommodate up to four wheelchairs at a time.

► **NCTD ADA Paratransit**

NCTD provides fully accessible fixed route vehicles in their service operations. NCTD contracts directly with an independent firm to operate the "LIFT" Services, which is ADA Paratransit providing curb-to-curb service for a ADA certified individual and up to one PCA. Upon vehicle arrival, passengers must pay with either cash or a prepaid ticket book. Trips may be scheduled as early as one to two days in advance. LIFT operates with a one hour (either way) window for scheduling pick up times in order to ensure an efficient demand-responsive trip scheduling system.

5.2 Neighboring Systems

Transit services in adjacent jurisdictions connect to services to and from San Diego County and are therefore recognized in the regional transportation inventory.

► **Orange County Transportation Authority (OCTA)**

The OCTA is a multimodal transportation agency serving Orange County. The OCTA operates countywide bus and paratransit service; the 91 Express Lanes toll facility, freeway, street and road improvement projects, motorist-aid services, regulation of taxi operations, and administers all of Orange County's Metrolink rail corridor service.

The OCTA recently prepared its draft Long-Range Transportation Plan (LRTP) that provides the planning foundation for future transportation improvements. The proposed LRTP includes improvements to the transportation network, such as new and widened freeways, tollways, roadways, new and enhanced transit facilities, regional bikeway improvements, and new environmental programs.

Orange County's current transit system includes a network of local bus routes that provide service to most residential and employment areas of the County, several express bus routes, and service for longer-distance travel. The current (2004) level of ridership is 67.5 million riders. The number of Orange County riders on Metrolink has increased from less than 145,000 passengers in 1994 to over 3,000,000 passengers in 2004.

Orange County's express buses use the freeway system to provide commuters with faster service over longer distances. There are currently nine express bus routes in place using I-5, I-405, SR 91, and SR 57 to connect major employment centers and park-and-ride lots.

OCTA's goals for transit improvements include improving bus connections to Metrolink, developing rapid bus service on major arterials, and improving Metrolink frequency. None of OCTA's routes serve San Diego County; however, OCTA Routes 1 and 191 serve San Clemente Plaza, where passengers can transfer to San Diego NCTD BREEZE Route 395 to Camp Pendleton and Oceanside. Interagency transfers from OCTA to BREEZE buses are available upon request.

► **Riverside Transit Agency**

The Riverside Transit Agency (RTA) is the CTSA for western Riverside County and is responsible for coordinating transit services throughout the approximate 2,500-square-mile service area. RTA provides both local and regional services throughout the region with 38 fixed routes, five CommuterLink routes, and Dial-A-Ride services using 231 vehicles. RTA Route 202 provides peak-hour commuter express service from Temecula to Oceanside Transit Center for connections to NCTD's COASTER service. An interagency transfer agreement between NCTD and RTA is currently being negotiated.

► **Imperial Valley Transit**

Imperial Valley Transit was created in 1989 as "Imperial County Transit." It began as a five-route system, with approximately 3,000 passengers a month. Today IVT has 18 routes, with an average ridership of 23,000 passengers per month. The service is operated by LAIDLAW Transit Services, Inc., which is administered by the County Department of Public Works and funded by the Imperial Valley Association of Governments.

Two Imperial Valley routes (Routes 400 and 450) serve the eastern edge of San Diego County at Ocotillo one day per week. However, there are no connecting routes from Ocotillo into the rest of San Diego County. The nearest MTS route serves Borrego Springs.

► **Tijuana**

The border crossings between the United States and Mexico are the busiest in the world. Annually, more than 31 million cars carrying nearly 73 million passengers, 23 million pedestrians, and 1.3 million people arriving by bus have entered California from Mexico. In addition, nearly 1.3 million trucks enter the United States at the commercial crossings. Similar numbers of passengers, pedestrians, and vehicles head south from California to Mexico. To accommodate the border transportation system, a comprehensive effort is underway to improve access to border crossings, expand freight rail service, and coordinate commercial vehicle crossings.

A proposed third border crossing at East Otay Mesa would provide an alternate entry for vehicles and commercial trucks. In the United States, the proposed SR 11 will connect the new border crossing to SR 905 and SR 125. In Mexico, the Tijuana-Rosarito 2000 corridor will connect to the East Otay future Port of Entry.

The Otay Mesa-Mesa de Otay Binational Corridor Strategic Plan, adopted by the SANDAG Board in 2007, proposes to improve cross-border travel, giving high priority to public transportation. The City of Tijuana has identified several transit issues, including saturated streets due to growth in vehicular travel, inadequate boarding facilities, an older bus fleet, lack of schedules for transit routes, and inadequate control of transit operations. A restructuring plan is proposed to better meet travel demand patterns in Tijuana.

An additional method that facilitates border crossing is offered by the newest airline of Mexico, Volaris. This airline offers shuttle service from the Santa Fe Depot in San Diego to the Tijuana Airport in Mexico. A one-way ticket to Tijuana costs \$15, and return services also are available from the Tijuana airport to both the San Ysidro border and downtown San Diego. It should be noted that cross-border transit services require patrons to alight at the border, walk through the inspection area, and re-board their bus once they have cleared Mexican Customs.

5.3 Interregional Systems

► Amtrak

Amtrak's 351-mile Pacific Surfliner corridor serves more than 2.5 million intercity passengers each year. Together with more than six million commuter passengers using either Metrolink or COASTER, it is the second busiest passenger rail corridor in the nation. The coastal corridor runs from San Diego to San Luis Obispo through six counties. Stations in San Diego County include Oceanside, Solana Beach, Old Town, and downtown San Diego. Connections to the transit system occur at each of these stations, including COASTER, Metrolink, Greyhound, local bus routes, the San Diego Trolley, and the SPRINTER light rail route.

The Surfliner operates 7 days per week, 11 times per day. Most service is between San Diego and Los Angeles; 2 round trips each day operate between San Luis Obispo and San Diego (including stops at Santa Barbara), while the other round trips operate between Los Angeles and San Diego.

Since 1989 SANDAG has been a member of the Los Angeles, San Diego, San Luis Obispo (LOSSAN) Rail Corridor Agency, which seeks to increase ridership, revenue, capacity, reliability, and safety on the corridor. Other members of LOSSAN are rail owners and operators and regional transportation planning agencies.

LOSSAN has secured funding for intercity rail programs. The State of California has invested more than \$1 billion in the corridor, along with \$200 million from Amtrak and \$300 million by local member agencies. Federal funding since 1996 has resulted in \$24 million in improvements, including grade separations in the cities of Solana Beach, Commerce, and Fullerton. LOSSAN also has obtained federal funds for the Del Mar Bluffs Stabilization project.

LOSSAN aims to enhance funding for intercity rail, enhance service frequency and quality, improve safety, and promote transit-oriented development.

The Rail2Rail program previously allowed COASTER's monthly passholders to ride *Surfliner* trains within the limits of their monthly pass. This service provided additional options for people traveling between the Santa Fe Depot, Solana Beach, and Oceanside. Similarly, Amtrak passengers could ride the COASTER if they had a valid Amtrak ticket for service between Oceanside, Solana Beach, and the Santa Fe Depot. The COASTER-Rail2Rail-UPGRADE allows passengers holding a COASTER monthly pass to board Amtrak California Surfliner trains. The Rail2Rail-UPGRADE can be added to a three-zone pass for an additional \$84 or \$59 for a one-zone pass.

► Metrolink

Metrolink is a regional rail system, including commuter and other passenger services, linking communities to employment and activity centers in Riverside, San Bernardino, the Inland Empire, Orange, and Ventura Counties. The services on board the Orange County line are offered on both weekdays and weekends.

Although the Orange County line provides connections to the Oceanside Transit Center and links San Diego County with Los Angeles and Orange County, there is currently not a transfer agreement in place between the COASTER and the Metrolink. Passengers wishing to continue their rail trip further south must purchase an additional ticket on the COASTER in order to get to their final destination. There is a transfer agreement allowing Metrolink passengers to transfer to the NCTD BREEZE bus and SPRINTER rail system; however, the transfer agreement is only valid one-way.

Metrolink tickets may now be purchased at the Santa Fe Depot in San Diego, although the service is only available at Oceanside.

5.4 Ridesharing Alternatives

Alternative public transportation opportunities are available in the San Diego region through existing vanpooling programs. Vanpooling programs involve coordination services such as ride matching, but also can involve operation of regional van or car service. Vanpooling services located in the San Diego region are described in greater detail below.

► iCommute



iCommute is the commuter services program for the San Diego region. The program is managed by SANDAG and offers free services to help commuters find alternatives to driving alone. Services include: carpool matching services (for work and school), regional vanpool program, “Guaranteed Ride Home” program, Bike to Work information, bike locker rentals throughout the County, transit information, teleworking information for employers, and customized commuting programs for employers.

iCommute’s vanpool program utilizes the Congestion Mitigation and Air Quality (CMAQ) Improvement Program and the San Diego County Air Pollution Control District funds to subsidize up to \$400 per month of the van lease cost for approved vanpools. Vanpool costs range from approximately \$600 to \$1,400 per month for a variety of van sizes provided by one of three vendors. Commuters initiate and negotiate their own lease agreements. Maintenance and insurance are typically included in the lease cost, while vanpool users pay for gas and the remainder of the van lease not covered by the subsidy.

iCommute’s regional bike locker network includes 559 locker spaces serving 467 current users. The lockers are currently free to use, with a \$25 or \$35 security deposit for the key. Funding for management of the program and locker maintenance comes from CMAQ. iCommute is currently exploring a retrofit of existing lockers and purchase of new electronic on-demand units to make the network compatible with the Compass Card, the region’s new smart card standard.

5.5 Other Governmental Agency Transportation

► School Buses

The provision of school transportation, with dedicated yellow school buses, is a discretionary service of local school districts. Of the 42 school districts in San Diego County, 30 offer yellow bus transportation, while six offer transportation to their special-needs students only. On a daily basis, approximately 54,000 students and 11,700 special-needs students are transported to and from school by yellow school buses. In school districts where yellow school busing is not provided, the public transit system is often the only alternative for middle and high school students. In some areas of the County, students are a major source of ridership and revenue for transit operators, but they also are a challenge to serve due to the sharp peak periods created by strict school schedules and federal rules that limit the ability of transit to serve the market. In addition, new schools in some parts of the region are being built in areas beyond existing transit services. Due to the limitations of transit funding and federal rules, creating service extensions to meet the needs of the new schools are not always feasible.

The largest single school district in San Diego County is the San Diego Unified School District, which operates about 550 buses. In comparison, the combined transit fleets of San Diego Transit, MTS Contract Services, Chula Vista Transit, and NCTD operate approximately 578 peak buses. The transit systems have substantially higher ridership because transit buses are in use for many more hours each day than school buses and are able to carry standees. Comparing the fleet size provides an excellent indication of the substantial demand for school transportation during peak periods. Altogether, the remaining 41 school districts in both the urban and suburban portions of the County operate about 574 buses, for a countywide total of more than 1,000 school buses.

The San Diego Unified School District, or San Diego City Schools (SDCS), transports about 18,000 students out of a total enrollment of 135,000. The majority of those students (about 71 percent) are either in the voluntary integration or magnet schools programs. The majority of the remaining students are special-education students, who are offered transportation as part of their individual education plan). SDSC is legally obligated to provide transportation to special-education students to match student needs with the program that best meets their needs.

Transportation is provided for eligible students who attend an integration program outside of their neighborhood school boundaries. No student living less than one mile from school is eligible to ride. For magnet schools, only elementary students who live two miles or more from the school, and atypical, middle, and secondary school students who live two and one-half miles or more from the school, are eligible for transportation. Secondary and atypical school students may be expected to travel up to one mile from their homes or service addresses to the designated bus stop. Elementary students (including kindergartners) may be expected to travel up to four-tenths (0.4) of a mile to the bus stop.

Due to an increase in budgetary cuts over the past few years, a number of schools have chosen to eliminate bus services. This places a great burden on parents and caregivers to ensure a safe passage to educational facilities. For facilities that have the capacity to entertain alternative solutions, school administration and active parent associations have worked to find creative mobility solutions for their students/children. Such low-cost solutions encourage ridesharing and other active transportation alternatives.

► **University of California, San Diego (UCSD) Shuttles**

UCSD operates an extensive network of 11 shuttle routes around the UCSD campus and to major offsite landmarks, such as the Old Town Transit Center, the Sorrento Valley COASTER Station, University Towne Center, Hillcrest, and the airport on major holidays. Access to the shuttles is limited to UCSD students, faculty, and staff. The services operate various schedules, but some service is available seven days per week and as late as 12:15 a.m. The service is free of charge for currently registered UCSD students, faculty, and staff.

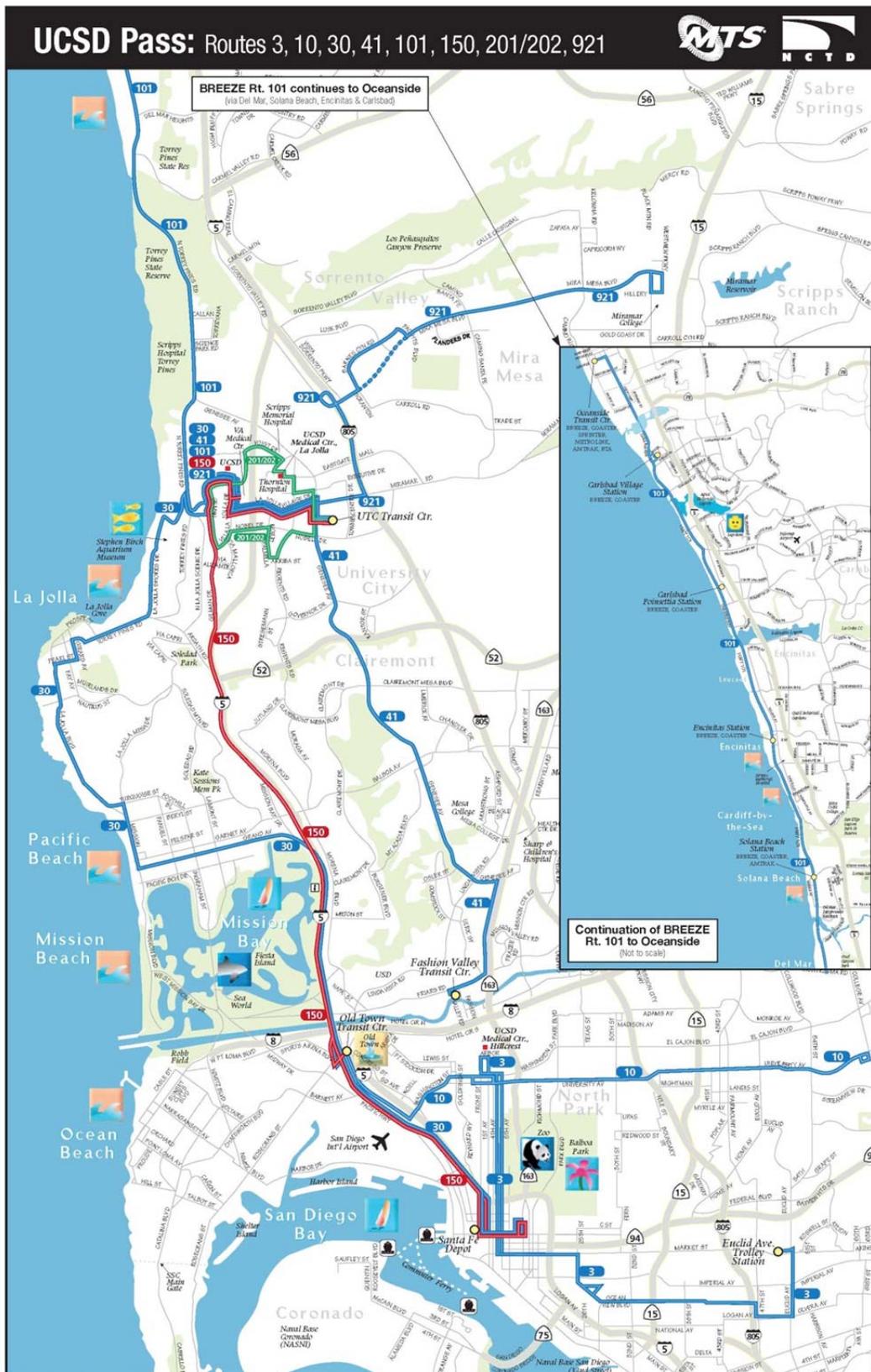
The routes are:

- Academic-year shuttles:
 - Campus Loop Shuttle
 - City Shuttle
 - East Campus/Regents Express Shuttles
 - Holiday Airport Shuttle

- ▶ Year-round shuttles:
 - COASTER Shuttle
 - Hillcrest/Campus Shuttle
 - Hillcrest/Old Town Transit Center Shuttle
 - Mesa Housing Shuttle
 - Sanford Consortium
 - Scripps Institution of Oceanography Shuttle
 - Torrey Pines Center Shuttle

In addition, UCSD has established a special arrangement with both MTS and NCTD allowing students, faculty, and staff to ride free on regular routes that directly serve the UCSD east and west campuses (Routes 30, 41, 101, 150, 921, and the SuperLoop (Routes 201, 202, and 204) and the two routes that serve the UCSD medical center in Hillcrest (Routes 3 and 10). In June 2012, SuperLoop route 204 will extend service east to Judicial Drive providing additional coverage for the University City planning area. UCSD passengers may board NCTD Route 101 free anywhere along the route between Oceanside and UTC. Figure 5.1 shows these routes.

Figure 5.1: Free-Fare Routes for UCSD Students, Faculty, and Staff



► **Cal State San Marcos Shuttle**

Cal State San Marcos Parking and Transportation Services provide a free shuttle between the Cal State San Marcos SPRINTER station and the campus. Shuttle services operate from 7 a.m. to 9 p.m. Monday through Friday. The shuttle runs on a continuous 15- to 20-minute loop through campus stopping at University Village Apartments, Craven Circle, Chavez Circle, and back to the SPRINTER station in conjunction with the University semester schedule for fall, spring, and summer sessions. A lunch-time service from Craven Circle to the Ralph's shopping center also is available from 11:30 a.m. to 1:30 p.m. The shuttle also is ADA compliant.

5.6 Private Transportation Providers

The San Diego region also has a number of privately funded transportation services that cater to the public or large groups of select users. These services do not necessarily receive public funds, but in some cases, have emerged due to the inability of publicly financed systems to meet demands because of funding, cross boundary issues, or the limited size of the market. An example of one such privatized service is carsharing. Over the years there have been many attempts by private companies to operate carsharing programs in the San Diego region.

► **Employer Shuttles**

It is understood that employers in the region do offer shuttle services for their employees; however, there is no inventory of the services. The shuttles may be operated by company employees or contracted to a transportation provider. The shuttles typically operate from transit centers, such as the Sorrento Valley COASTER station or between remote employee parking and the jobsite. Currently, Qualcomm is providing shuttle service to its employees from the Sorrento Valley COASTER station. A similar shuttle is being operated by Cloud 9 Shuttles. In future years, additional research will be undertaken to identify the locations of employer shuttles as their presence is indicative of gaps in transit coverage, as well as a confirmation of potential demand.

► **Old Town Trolley**

The Old Town Trolley is a tourist-oriented service that operates themed buses year-round. A two-hour round trip adult ticket costs as low as \$32.40. On and off privileges are allowed on each tour, providing visitors the opportunity to explore major landmarks. Major points served are Old Town, Balboa Park, San Diego Harbor, Horton Plaza, Coronado Island, Seaport Village, Little Italy, and the San Diego Zoo. There are currently no joint fares or reciprocity arrangements between the Old Town Trolley and the public transit system.



► **Greyhound**

Greyhound is a nationwide inter-city bus operator. Within San Diego County, Greyhound offers services from Oceanside, Escondido, El Cajon, and San Ysidro to downtown San Diego. Greyhound services operate express via the freeway system. In the suburbs, Greyhound operates from public transit centers in Oceanside, Escondido, El Cajon, and San Ysidro. However, in downtown San Diego, Greyhound uses its own terminal. Greyhound operates seven days per week. Service on board the

Oceanside and San Ysidro bus lines is typically offered every hour throughout the day, with some early morning and/or late night trips.

Oceanside to San Diego service is offered 12 times daily, with an adult cash fare of \$9 and a typical scheduled travel time of 50 minutes. Escondido to San Diego is offered 2 times daily, with an adult cash fare of \$15 and a travel time of 40 minutes. El Cajon to San Diego is offered 3 times daily, with an adult cash fare of \$13 and a travel time of 30 minutes. San Ysidro to San Diego is offered 17 times daily, with an adult cash fare of \$13 and a travel time of 25 minutes.

► **Casino Shuttles**

Indian casinos in the rural areas of San Diego County have become major attractions for residents and visitors, creating a significant demand for bus services. Some casinos, such as Pala, Harrahs, and Viejas, are located on existing rural bus routes, while others are not. The casino industry has responded with special bus services for casino visitors and employees. Barona Valley Ranch Resort and Casino, Sycuan Resort and Casino, Valley View Casino, and Viejas Casino now operate shuttle service to selected areas throughout the County to help fill in the missing links in MTS and NCTD service networks.

Barona Valley Ranch Resort and Casino currently operates approximately 97 express shuttles to and from the East County, South Bay, Mira Mesa, and Kearny Mesa. These shuttles run from 5:15 a.m. until 2:15 a.m. the following morning and operate on weekdays and extended early morning service on Saturday and Sunday only. Passengers must be 18 years or older to ride the shuttle, and the fare to board the shuttle is \$10. If the passenger has a Club Barona Card, the fare is free. In addition, Barona operates three express shuttles on Wednesdays and Thursdays that services the Los Angeles and Laguna Woods areas. The fare to board those shuttles also is \$10.

Sycuan Resort and Casino currently operates approximately 28 daily shuttles to and from the Plaza Bonita Shopping Center and the El Cajon Trolley Station. In addition, 14 daily shuttles also run to and from Tecate and Horario Diario in Mexico. Sycuan also operates 11 supplementary evening and bingo routes that service the South Bay, Chula Vista, National City, Spring Valley, Mira Mesa, Kearny Mesa, North Park, and North County, and these routes also run daily. All passengers must be 18 years or older to ride, and the fare to board is \$10. If the passenger has a Club Sycuan Card, the fare is free.

Valley View Casino currently operates 12 shuttles that run daily to and from the North County Coast, Escondido, Rancho Bernardo, Poway, Rancho Peñasquitos, and Mira Mesa. Valley View also provides service on select days of the week to other areas in the County. On Tuesdays, Fridays, and Saturdays, 5 shuttles are offered from Chula Vista and National City, as well as from the Euclid and Market Trolley station. Two shuttles service downtown San Diego on Thursdays and Sundays only, and two shuttles service the Hillcrest area on Mondays and Wednesdays. Also, Valley View offers shuttle service to Laguna Woods Village on Mondays by reservation only. It is free to ride any of these shuttles.

Viejas Casino currently operates 74 daily shuttles that service El Cajon, Mira Mesa, Kearny Mesa, Rancho Penasquitos, Imperial Valley, San Ysidro, and National City. These shuttles operate from 5:15 a.m. until 2 a.m. the following day. Passengers must be 18 years or older to ride, and the fare to board is \$10. If passengers have a V Club card, the fare is free.

► Airport Shuttles

Frequent shuttle service between downtown San Diego, the Santa Fe Depot train station, and Lindbergh Field is provided by MTS Route 992. In addition, private shuttle operators provide shared-ride shuttle service from all points in San Diego County to the International Airport.

Cloud 9 Shuttle is a privately owned and operated shared-ride taxi service that serves the airport market. Cloud 9 Shuttle also is authorized to provide "shared-ride" transportation throughout San Diego County to San Diego Amtrak, the San Diego Convention Center, and the San Diego Cruise Terminal. All Cloud 9 Shuttle fares are structured by ZIP code.

► Mexicoach

Mexicoach operates shuttle services from San Ysidro to their downtown terminal in Tijuana, with connections to Rosarito and the industrial parks. The service operates from the San Ysidro transit center and offers convenient connections with the Trolley. The cash fare on Mexicoach is \$4 one way or \$6 round trip. All buses are wheelchair lift-equipped.

There are currently no joint fares or reciprocity arrangements between Mexicoach and the public transit system.

► Jitney Service

Jitneys are privately owned vehicles operating on a fixed or semi-fixed schedule for a fare. The City of San Diego gained national attention by legalizing jitney services and deregulated taxis in 1979. By 1984 jitneys flourished in San Diego, with around 100 vehicles operated by 15 companies and ridership peaking around 15,000 weekly passengers. However, increased regulation along with the declining economy and a reduced military presence in the late 80s reduced the viability of jitney service to short-haul trips in the San Ysidro area. Jitney licenses are provided by MTS, while the Sheriff's Department licenses jitney drivers. Each jitney route is approved by MTS along with the fare, which currently ranges between \$1.25 and \$1.50 per passenger.

There are currently 11 licensed jitney companies, with 12 vehicles serving the greater San Ysidro/Otay Mesa area. Space for the 12 jitneys has been assigned to the curb (240 feet) near the San Ysidro Intermodal Transit Center on San Ysidro Boulevard across from the Trolley line. The main purpose of the jitneys in the San Ysidro community is to provide transportation for the swap meets, as well as area businesses. The Coronado swap meet operates Wednesday, Saturdays and Sundays from 6 a.m. to 3 p.m. at the drive-in theater facility at 2170 Coronado Avenue, San Diego. The jitneys are the only transportation to and from this swap meet. Operations are based on a fixed or semi-fixed route depending on passenger requests. Additionally, jitneys may stop at any existing bus route along the approved jitney route to pick up or drop off passengers. When the swap meet is closed, the jitneys offer service between the transit center and Palm Avenue.

There are no designated jitneys serving the San Ysidro swap meet, which operates Wednesdays through Sundays from 8:30 a.m. to 8 p.m. (6 p.m. on Saturdays and Sundays). Instead, free shuttle transportation is provided by this swap meet from the intersection of East Beyer Boulevard at East San Ysidro Boulevard intersection. However, other jitney routes operate in the vicinity of the San Ysidro swap meet and jitney vehicles often stop at the free shuttle stop to solicit fare-paying rides for individuals unwilling to wait for the next free shuttle.

▶ **Emergency and Non-Emergency Transportation**

A number of agencies provide transportation to hospitals in the San Diego region. The hospitals may fulfill the demand themselves, providing either emergency ambulances and/or shuttle services to their campuses and to their immediate neighbors. These include shuttles between remote parking areas and hospital sites for employees (e.g., Palomar Hospital District) and shuttles for staff and patients (e.g., UCSD Hillcrest and Veteran's Hospital).

The private/public market also has facilitated this demand. The following is a limited list of medical-related transportation providers, both emergency and nonemergency, in the San Diego region:

▶ **Emergency**

- ▶ American Medical Response
- ▶ Balboa Ambulance
- ▶ Care Medical
- ▶ Critical Air Medicine
- ▶ East County Fire Department
- ▶ Pacific Ambulance
- ▶ San Diego Medical Services
- ▶ Schaeffer Ambulance

▶ **Non-Emergency**

- ▶ American Medical Response
- ▶ Care-A-Van
- ▶ DVA Transit
- ▶ No Vacancy
- ▶ San Diego Medical Services
- ▶ Sharp Healthcare Transportation
- ▶ TLC Medical Transport
- ▶ Tri-City Medical Center
- ▶ VA Patient Travel

Hospital shuttles are not necessarily limited to private agencies, but in many cases fall into this category.

▶ **Private Paratransit Service Providers**

California Paratransit Services provides transportation service for seniors and persons with disabilities. Transportation is contracted out through various taxi companies, who typically charge a fee of \$2.30 per mile with no loading fee. Wheelchair-accessible vehicles are available, but scheduling is suggested one week in advance.

5.7 Specialized Transportation Providers

In cases where individuals are not able to access or have needs that meet beyond what public transit (both fixed-route and demand-based services) offers, a breadth of specialized transportation providers operate to serve the needs of older adults, individuals with disabilities, and low-income individuals, among other (generally considered) transportation disadvantaged populations. This extension of transportation effectively expands the MTS and NCTD paratransit services. While all transit-operated services provide compliant ADA services, the service may not meet an individual's preference (travel time, for example) or means. Specialized transportation provided by either private, for-profit or non-profit organizations, in some cases, may have more flexible service parameters that more appropriately meet their client's preferred service needs. Additionally, programs that are subsidized through grant-funding are able to offer more cost-effective services.

5.8 Transportation Provider Survey

While past Coordinated Plan outreach efforts have focused more specifically on the individual passenger's needs, this year's edition of the plan, in conjunction with past passenger analysis, involved an extensive scoping of the available transportation providers within the region. By better understanding the available services, the needs and existing gaps/redundancy in social service agency transportation service are more effectively highlighted. In order for this to be assessed, SANDAG surveyed each agency to describe the service area (by city boundaries, ZIP codes, or within a certain radius of an area), population served, service type, among other more specific questions relating to specialized transportation services.

In January of 2012, SANDAG conducted a phone and internet survey to update the inventory of available services within the region. Over 120 transportation providers were contacted from the Consolidated Transportation Services Agency's (CTSA) transportation provider database. Of the 122 agencies¹ that were contacted, 11 of the identified providers had cancelled the respective program's transportation service, giving the survey a sample size of 111. Of the 111 active providers, 65 provided response to SANDAG's survey and questionnaire efforts. Within the survey, participants were asked about the service area of their operations, enrollment or program requirements, hours and days of operation, fare requirements, and vehicle types. The results of the survey are included in Appendix D. Though this sample is not a complete representation of all the transportation providers in the region, the survey does include research gathered from a bulk of the primary providers in San Diego.

While this survey exists as a sample of our San Diego region, a few key assumptions can be drawn from the analysis. Based on the feedback received from the survey efforts, the results may be summarized by the following²:

► **Location of Maximum Available Service is geographically clustered:**

According to the surveyed providers, maximum available service of specialized transportation services is found in San Marcos, Escondido, Poway, Santee, El Cajon, La Mesa and Lemon Grove. As shown in Figure 5.2, these areas provide over 20 mobility options in a compact region, leaving the rural east and urban south with little to no coverage.

¹ While SANDAG's records have 122 agencies on file that were contacted, organizations and agencies were encouraged to invite other transportation-related providers to participate in the survey and outreach efforts.

² While all survey responses were utilized in the analysis of this study, not all responses provided sufficient enough information for mapping. The findings from the survey may not be reflected in the graphic representation.

Table 5.1: Populations served by specialized transportation within San Diego

4. Please select the population(s) that you serve (select all that apply).

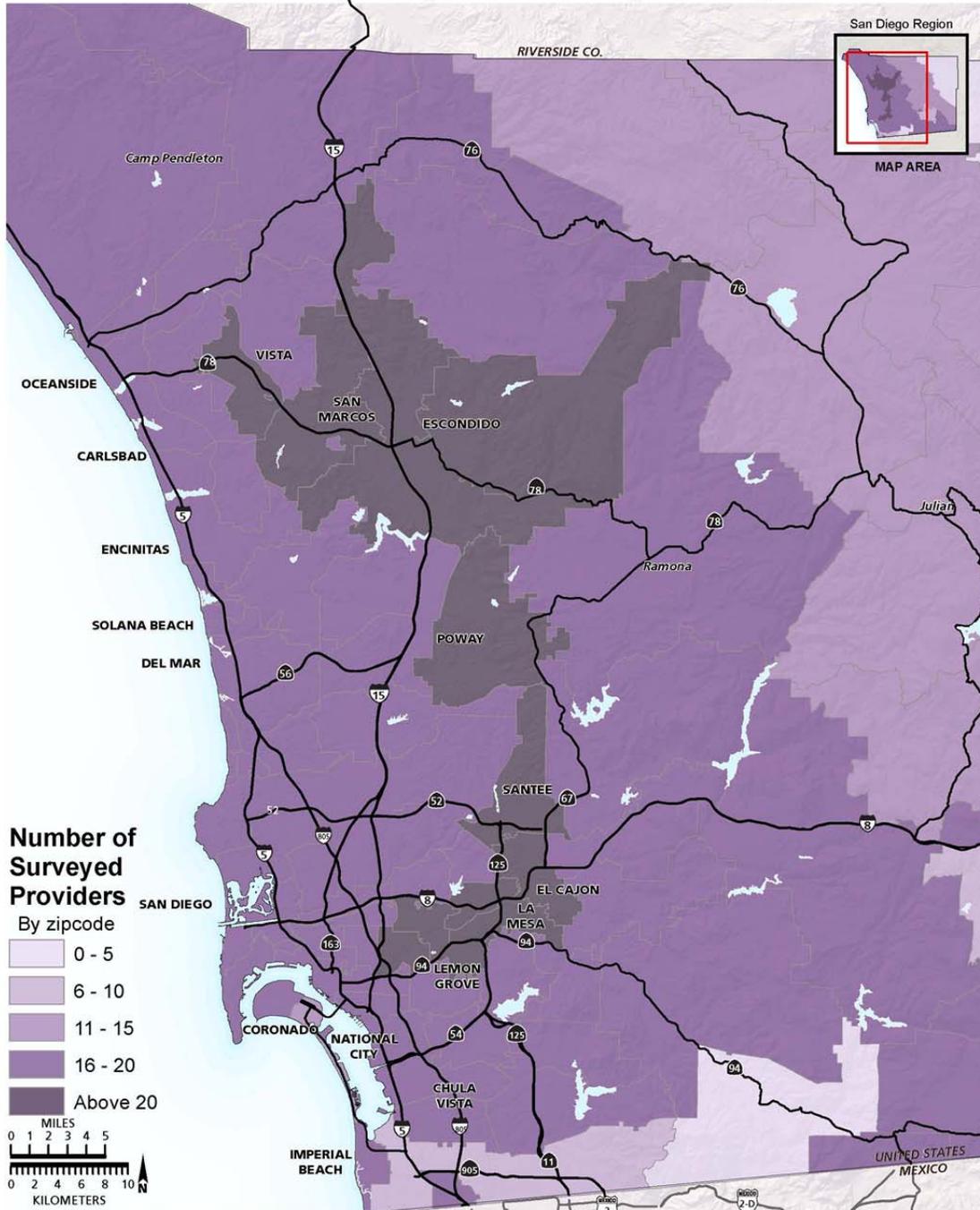
Answer Options	Response Percent	Response Count
Seniors (Age 60+)	82%	41
Disabled - Non-Senior	48%	24
Disabled - Seniors (Age 60+)	70%	35
Low-Income Persons	54%	27
Student/Youth	30%	15

► **Seniors (Age 60+)**

The Majority of Specialized Transportation services cater to the senior populations. Figure 5.1 indicates that the majority of surveyed providers offer transportation to individuals aged 60 and over. Eighty-two percent of respondents provide transportation to seniors, compared to Low-Income and Student/Youth programs at 54 percent and 30 percent respectively. Table 5.1 provides more information on the populations served in San Diego. Of the providers, a large portion of this service is in North County San Diego. Of those organizations that provide transportation to seniors, only eight providers throughout the entire County specialize in transportation for individuals age 85 and older. Figure 5.4 and 5.5 spatially demonstrate the density of providers that specifically identified themselves as serving individuals age 60 and over and age 85 and over, respectively.

Figure 5.2: Survey Sample of Available Specialized Transportation Providers throughout San Diego

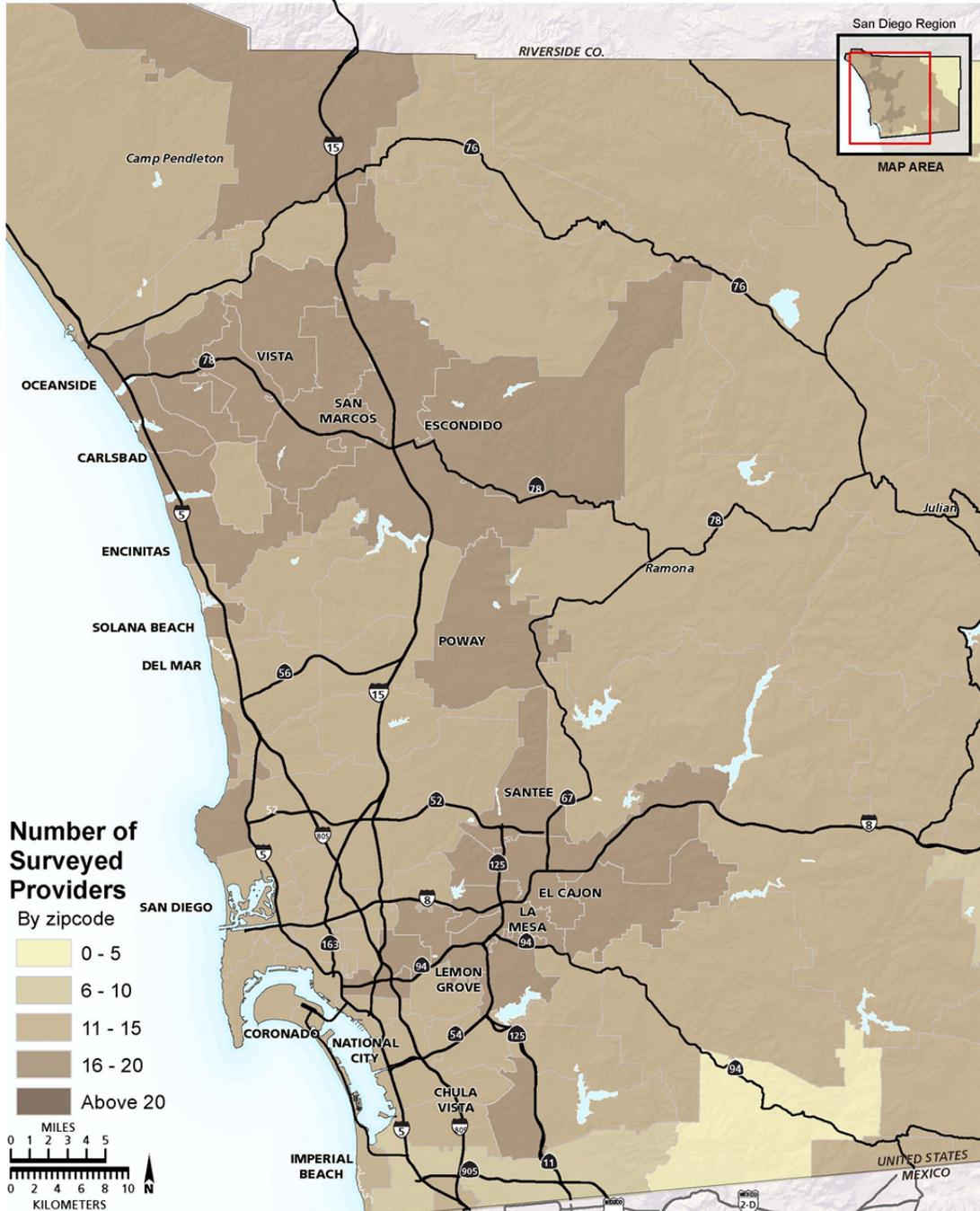
*Survey Sample of Available Specialized Transportation Providers throughout San Diego County**



*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the providers located in San Diego and does not account for all available services.

Figure 5.3: Survey Sample of Available Senior Specialized Transportation Providers throughout San Diego County

*Survey Sample of Available Senior Specialized Transportation Providers throughout San Diego County**



*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.

Figure 5.4: Survey Sample of Available Senior (60 Plus) Specialized Transportation Providers throughout San Diego County

*Survey Sample of Available Senior (60 Plus) Specialized Transportation Providers throughout San Diego County**

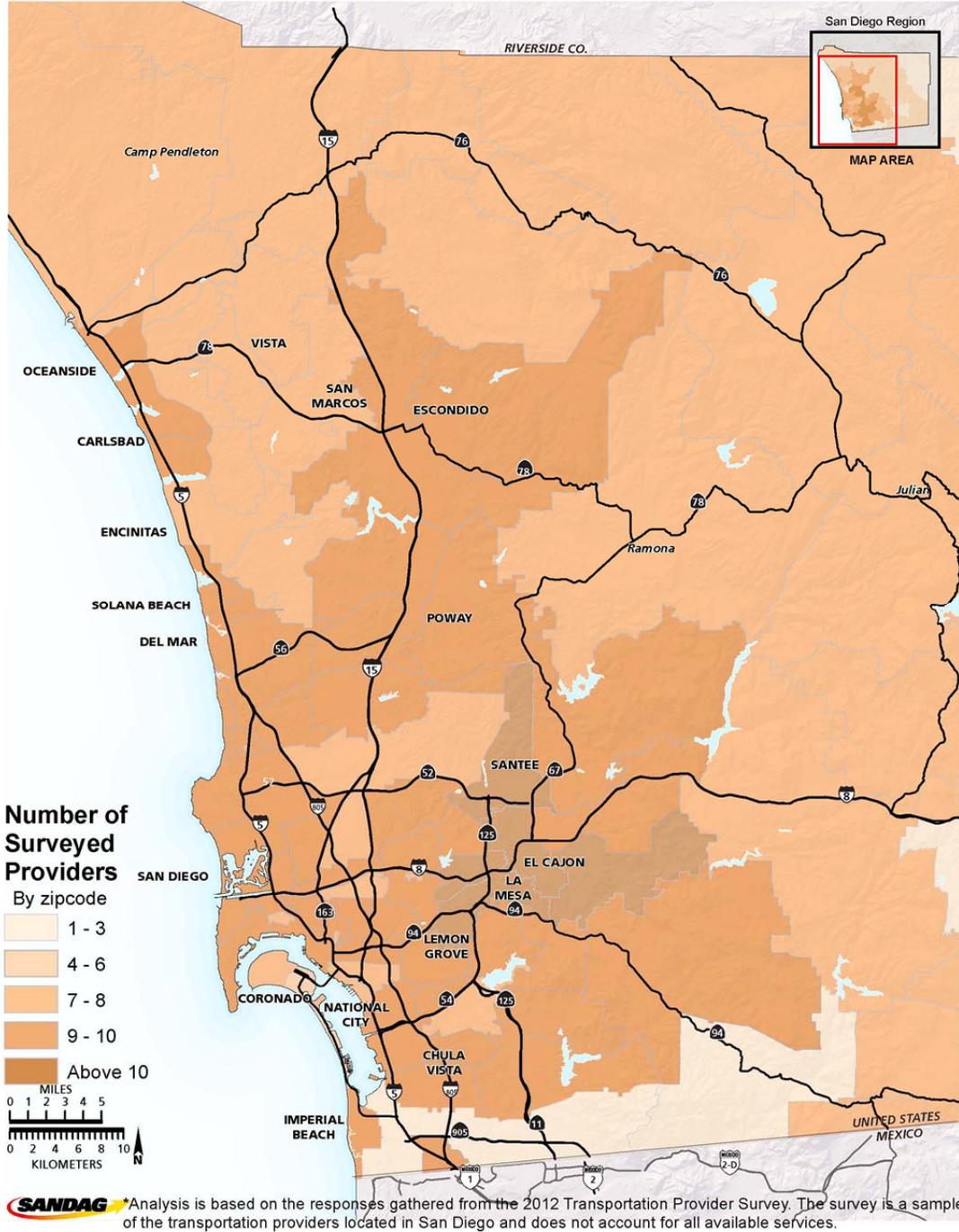
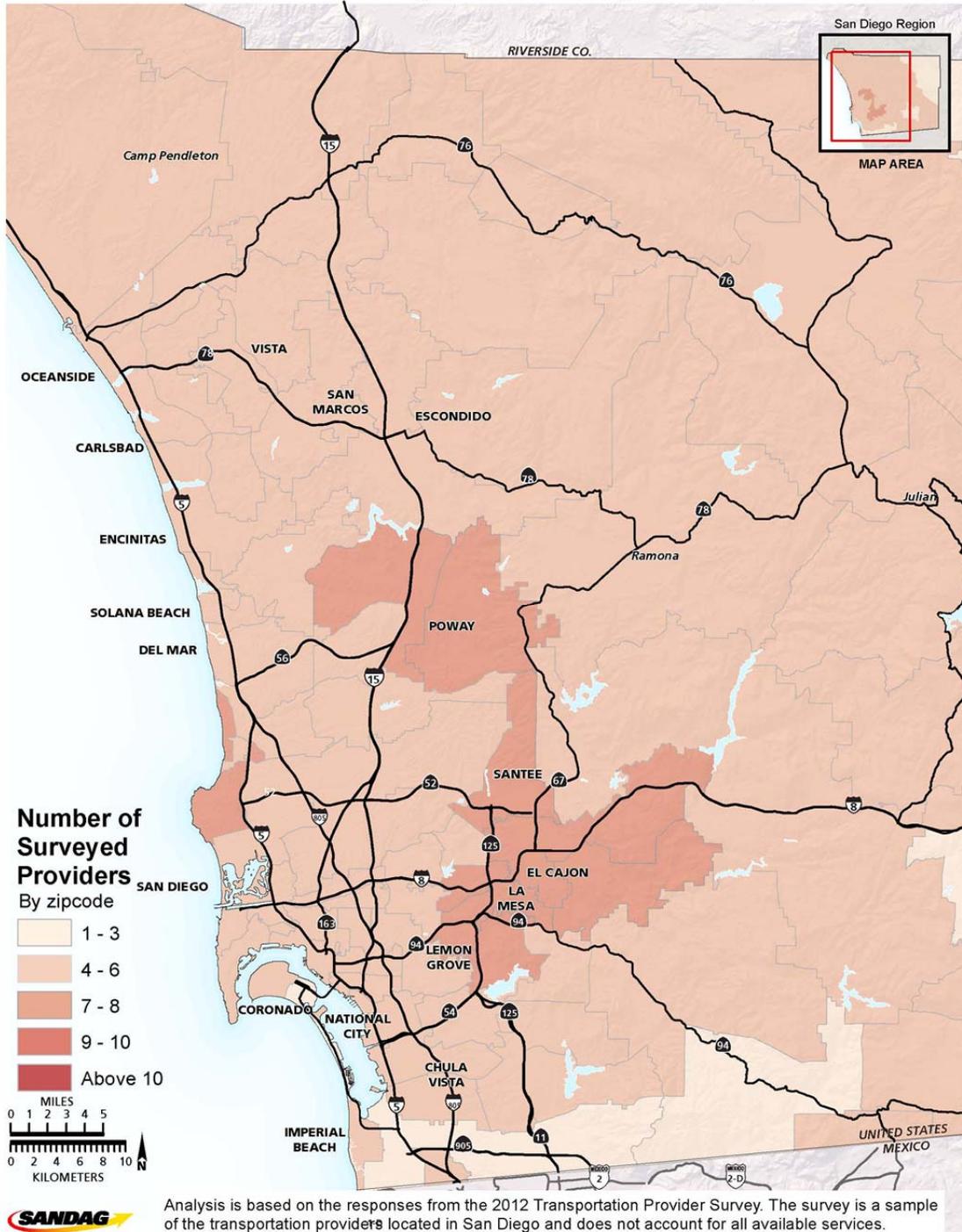


Figure 5.5: Survey Sample of Available Senior (85 Plus) Transportation Providers throughout San Diego County

*Survey Sample of Available Senior (85 Plus) Transportation Providers throughout San Diego County**



► **Disabled**

Less than one-fifth of survey respondents offer ADA accessible transportation. Of all the survey responses, only 18 percent of the surveyed agencies provide ADA van-accessible service. Of the organizations that primarily service individuals with disabilities (non-seniors), 25 percent of those agencies provide ADA van-accessible transportation.

Transportation providers serving disabled individuals are generally located in the Central/Southern portion of the County (Poway, El Cajon, La Mesa, Lemon Grove and Chula Vista), with considerable service in Solana Beach and La Jolla, as well. Figure 5.6 provides a visual display of disabled (non-senior) transportation availability. The maps representing transportation services available to persons with disabilities reveal less services available than those for seniors and an equal number of providers for low-income individuals.

Low-Income Providers. While Chapter 4 defines persons of limited means as being below a provided threshold of the poverty line, the transportation provider survey does not specify low-income conditions. As Figure 5.7 shows, limited services are available in South San Diego County, as well as the Rural North.

Twenty percent of agencies incorporate a volunteer driver program. Newer and more grassroots-oriented organizations find that offering a volunteer driver programs is not only cost-effective but preferable over shuttles or other forms of group-travel. Surveyed volunteer driver programs range in size from 1 volunteer driver vehicle to a fleet of 900.

Nine providers serve refugee populations. As discussed in Chapter 4, with a rise in in-migration in San Diego, an identified need to provide transportation for these populations to access jobs, medical-facilities and other life-sustaining destinations has been addressed.

Veteran Transportation Programs account for nearly 20 percent of surveyed respondents. With the majority of service existing in North County, twelve programs explicitly serve veterans. As identified in Chapter 4, as soldiers continue to return home from wartime activities at an unprecedented rate, an increased need for transportation programs that provide accessibility to medical facilities is an identified concern. Figure 5.8 shows the majority of service congregates in the Escondido, Poway, La Mesa and La Jolla communities/cities.

Other services include: homeless, youth, cancer patients, WTW recipients, women with children. While these population groups may not comprise of the majority of transportation disadvantaged individuals, they are certainly weighted with the same consideration and face adversity in equally different manners.

Figure 5.6: Survey Sample of Available Disabled Specialized Transportation Providers throughout San Diego County

*Survey Sample of Available Disabled Specialized Transportation Providers throughout San Diego County**

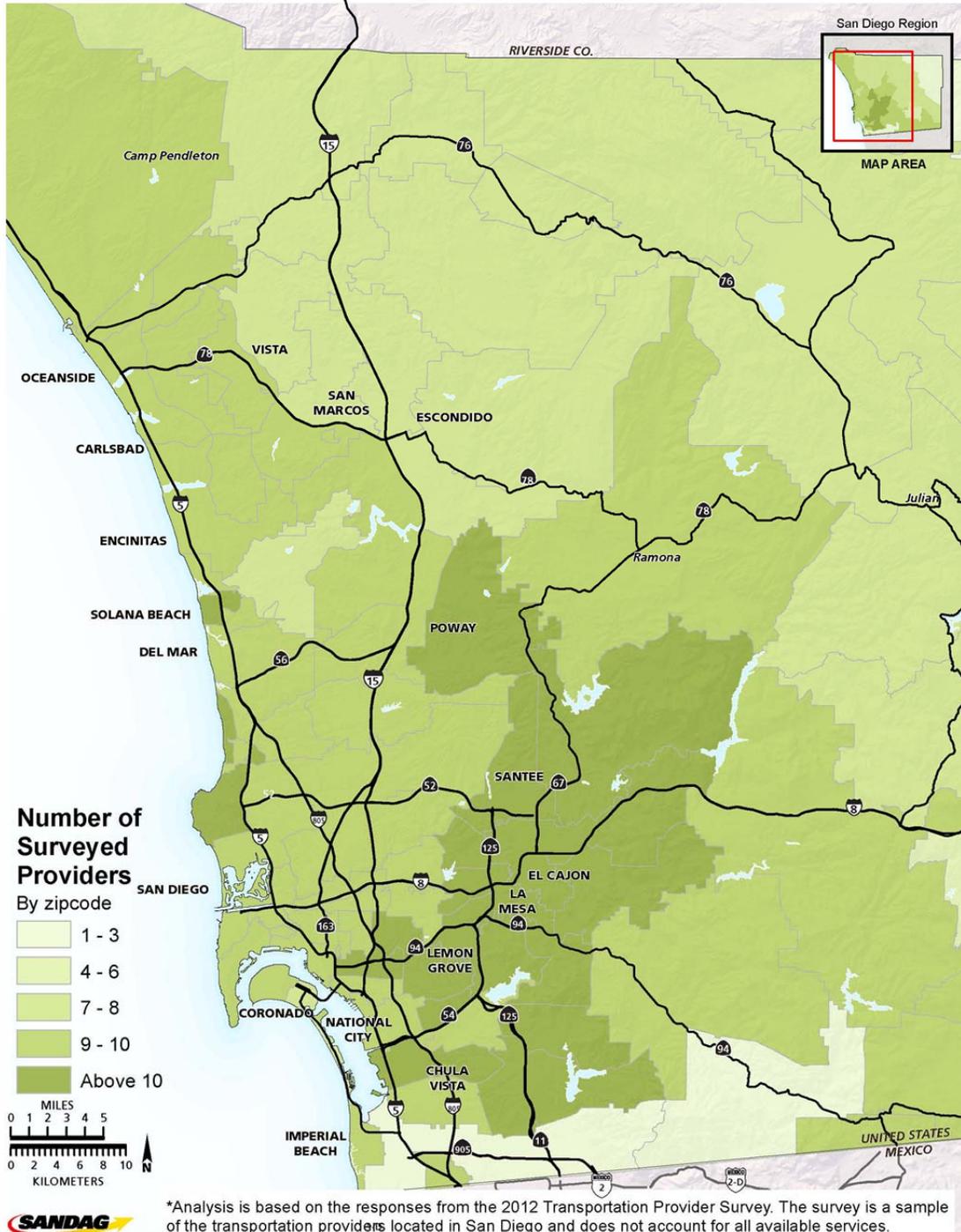
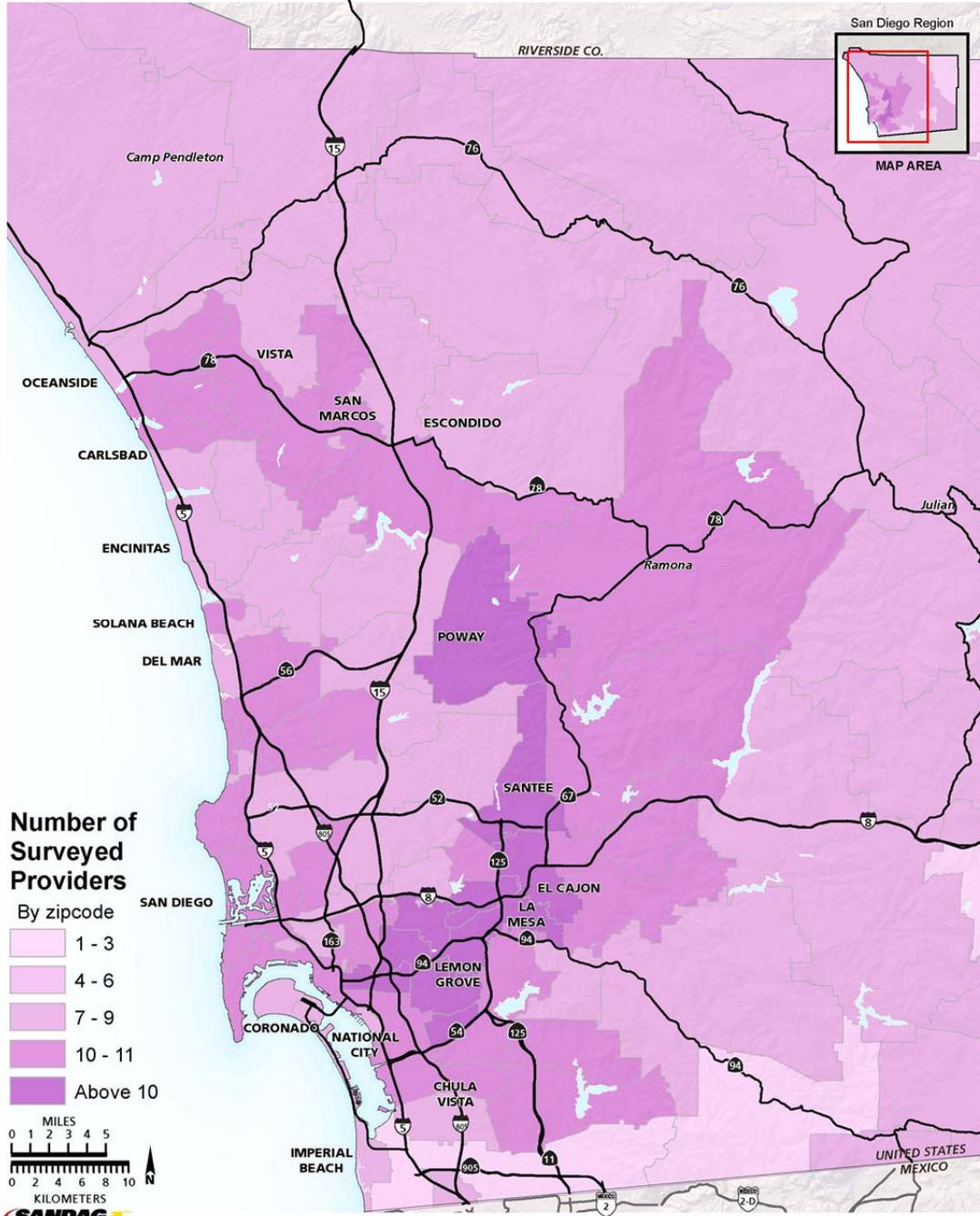


Figure 5.7: Survey Sample of Available Low-Income Transportation Providers throughout San Diego County

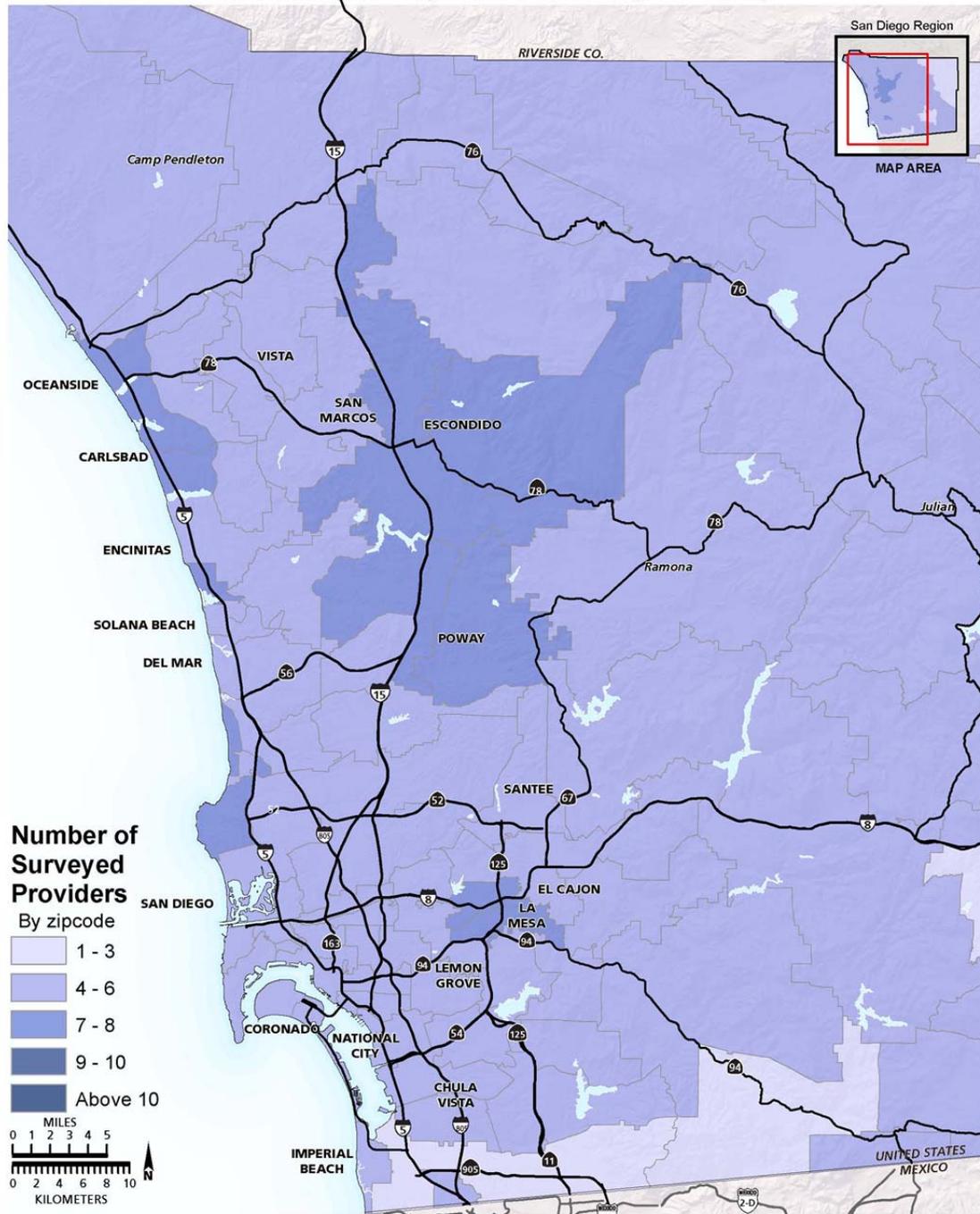
*Survey Sample of Available Low-Income Transportation Providers throughout San Diego County**



*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.

Insert Figure 5.8: Survey Sample of Available Veteran Transportation Providers throughout San Diego County

*Survey Sample Available Veteran Specialized Transportation Providers throughout San Diego County**



*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.

5.9 Program Management Plan

The previously mentioned service providers and transportation programs identified in the Transportation Provider Survey, represent a sample of the available services offered Countywide. Of the 120 plus providers contacted, a sub-selection of these agencies receive funding through three SANDAG managed grant programs: JARC, New Freedom, and Senior Mini-Grant (as identified in Chapter 1 and evaluated in Chapter 3). As stated in Chapter 1, a function of the Coordinated Plan is to help identify high-prioritized projects within the region that help meet San Diego's transportation disadvantaged population's growing needs. The Program Management Plan (www.sandag.org/CoordinatedPlan) outlines strategies and provides tools for effectively administering and monitoring the JARC, New Freedom, and Senior Mini-Grant programs. Among these strategies and tools is a standardized reporting procedure, which consists of uniform reporting forms for invoices, progress and quarterly reports, and performance data reports. Project information will vary by number of months in operation and date on which invoices and progress reports were provided. Future Coordinated Plan updates will include project narratives for JARC and New Freedom funded Services.

► Volunteer Driver Program and Coalition

There are a number of transportation services which utilize valuable community volunteers in the San Diego area to transport senior and disabled passengers. The San Diego County Volunteer Driver Coalition (SDCVC) brings together representatives from private agencies, nonprofits, and municipalities to learn from each other, share knowledge and resources, establish standards for driver qualification, and training. Many coalition members, including Jewish Family Service's *On the Go* – Rides & Smiles, City of Vista – Out & About, Peninsula Shepherd Center, City of Oceanside, City of La Mesa, ElderHelp, and ITN San Diego, are recipients of Senior Mini-Grant and New Freedom Federal funding.



The coalition has been meeting since February 2007 and has developed a coalition member handbook with a standardized rider application, a collaborative marketing piece, and hosts a yearly volunteer appreciation and training event. Each agency develops their own volunteer driver application customized to meet the needs of their agency or program. Additionally, a data collection program has been established to document services and impact by participating agencies. To date, over 120,000 rides have been provided by the SDCVC, supported by over 100,000 hours donated by hundreds of community volunteers.

► Consolidated Transportation Services Agency (CTSA) Information and Referral

Facilitating Access to Coordinated Transportation (FACT) serves as the CTSA on behalf of SANDAG. In this role, FACT maintains an inventory of transportation services in San Diego County and provides free in-person telephone referrals for the services. FACT tracks the number of referrals that are provided. Between March 2011 and March 2012 (twelve months), 1,059 referrals were provided, at an average of 81 referrals each month. Approximately half the referrals are to commercial taxi-type services for lack of alternatives. An overwhelming majority of callers were seniors or relatives and caregivers of seniors and were seeking referrals for transportation to access medical services. Most of the requests received pertained to travel within the urbanized areas of the County, and no

specific follow-up is initiated by FACT after the referral is made. Additionally, FACT has implemented a transportation brokerage for seniors who cannot utilize existing services in all cities of San Diego County as of June 2012. FACT refers callers to existing transportation options, when those options do not meet their needs transportation is provided through a contracted brokerage provider. The provider is chosen based on the most efficient and cost-effective service for the individual's needs.

5.7 Emergency Transportation Services

Transit and social service transportation can provide critical transportation services in the event of a regional emergency. Therefore, emergency transportation services have been included in the short-range transit planning process to acknowledge the roles that transit and social service transportation can play in meeting the needs of area residents during a catastrophic event. The following sections explain these roles in detail.

▶ Transit

Since all transit services are ADA-accessible, potentially all transit vehicles could be utilized in the event they are needed to provide relief for a major emergency. The County of San Diego's Office of Emergency Services (OES) coordinates the overall county response to disasters. For evacuations and emergencies, OES coordinates with the transit agencies to utilize fleet vehicles in the event that they are needed. There are currently 901 MTS and NCTD transit vehicles available to provide mass transportation assistance. During large-scale events, OES can coordinate with transit agencies outside of the county in the event that additional vehicles are needed for disaster relief.

▶ Social Service Transportation

Until recently, social service transportation was not included in the pool of potential emergency relief services coordinated or available to OES. To this end, OES is currently preparing a database and negotiating transportation agreements with social service transportation providers for emergency transportation assistance. Upon its completion, this project will assist the Emergency Operations Center staff in the event that additional transportation services are needed during an emergency. The center functions as a central facility to provide regional coordinated emergency response, including the coordination of vehicles available for disaster relief and evacuation. The social service transportation database will include information on the type of service that can be offered by each provider, along with the number of passengers that can be transported.

The Coordinated Plan



Chapter 6



**Strategies, Activities, and
Projects to Address
Transportation Gaps**

CHAPTER 6: STRATEGIES, ACTIVITIES AND PROJECTS TO ADDRESS TRANSPORTATION GAPS

This chapter identifies gaps in transportation services and strategies to address those gaps. The analysis and identification of service gaps within San Diego is based on a compilation of sources ranging from a review of the Chapter 4 demographic data from Census 2010, the availability of transit service, and survey outreach efforts of both transportation providers and passengers. As was noted in Chapter 4, public transit remains the most cost-effective and productive means of travel. In the case that transit is not available, sufficient or appropriate, specialized transportation programs help to round out a more balanced mobility network for the region. The following chapter begins with a discussion of service gaps and then provides strategies, activities and projects that can help patch together a seamless transportation network of both transit and specialized transportation. Such proposed strategies include existing services within the region, as well as nationwide best practices that could be applied in the San Diego region. The identification of service gaps, as well as strategies to meet those gaps found in this chapter, sets the stage for the prioritization of strategies developed for Chapter 7.



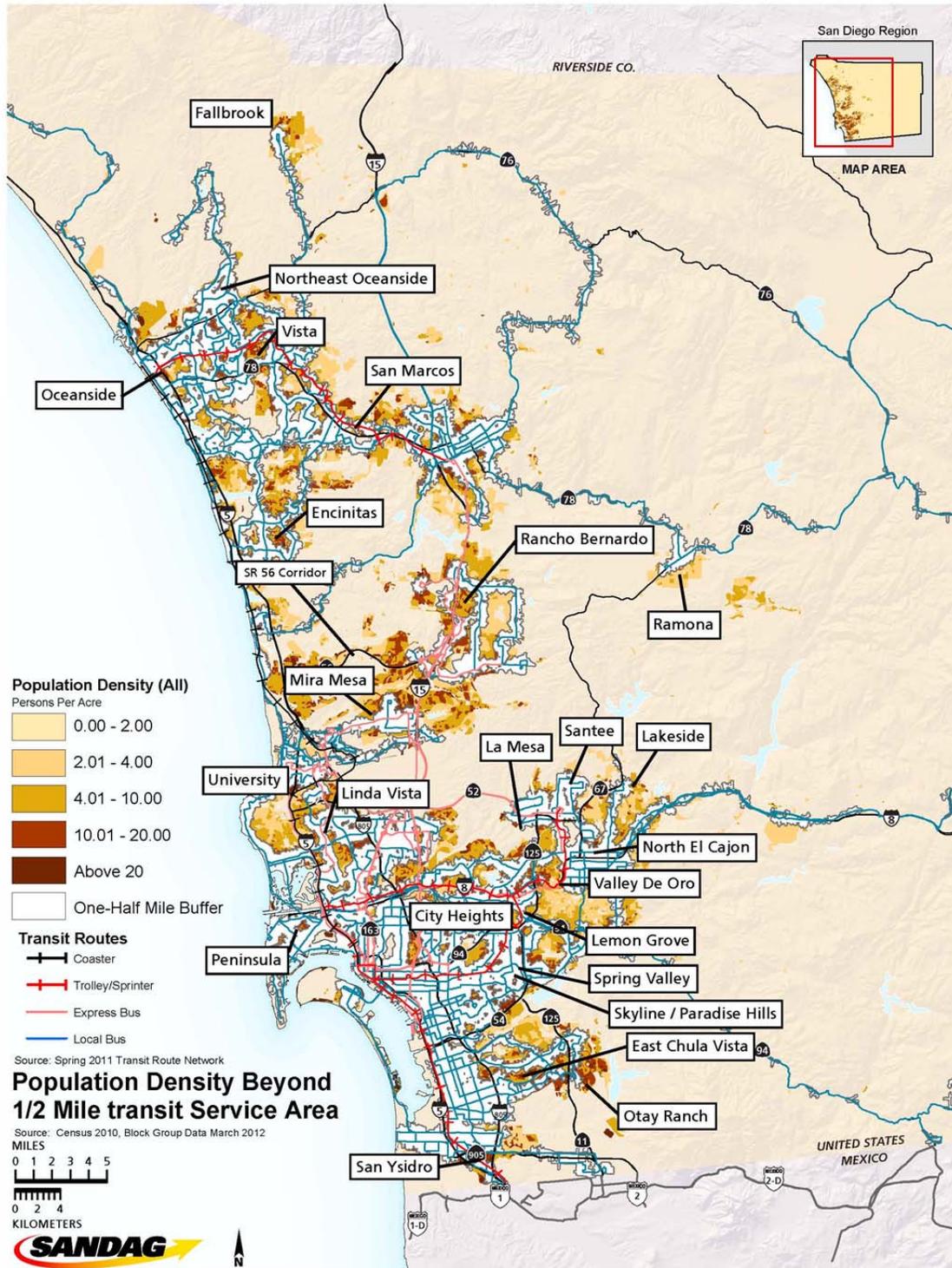
6.1 Gaps in Transportation Services

Gaps in transportation services were identified through the analysis of the difference between the demographic analysis of newly released Census 2010 data and the transportation inventory conducted in Chapter 5. This information was also supplemented with testimony given at the outreach meetings conducted for the Coordinated Plan based on gaps in services and needs of specific communities. Fixed-route public transit services were included in the analysis of all of the population groups in order to show how transit service can meet the daily needs of various population groups within the region (if available). This determination of “availability” was based on the Federal Transit Administration’s guidelines of half mile walking distances to transit stations¹.

While this chapter and the following chapter (identifying the priorities for implementation) focus on seniors, low-income individuals and persons with disabilities, mapping of the general population is provided to frame the discussion (see Figure 6.1). The inclusion of the general population map helps to show how regionally identified transit services from the RTP will help meet these gaps. For example, the forthcoming I-805 and I-15 Regional Bus Rapid Transit (BRT) services will help meet the gaps in services identified in the Otay Ranch area of Chula Vista (I-805 BRT) and the communities along the I-15 (I-15 BRT). These services are scheduled to begin

¹ Federal Register/ Vol. 74, No. 218/ Friday, November 13, 2009, “All pedestrian improvements located within one-half mile and all bicycle improvements located within three miles of a public transportation stop or station shall have a de facto relationship to public transportation.

Figure 6.1: Population Density Beyond ½ Mile Transit Service Area

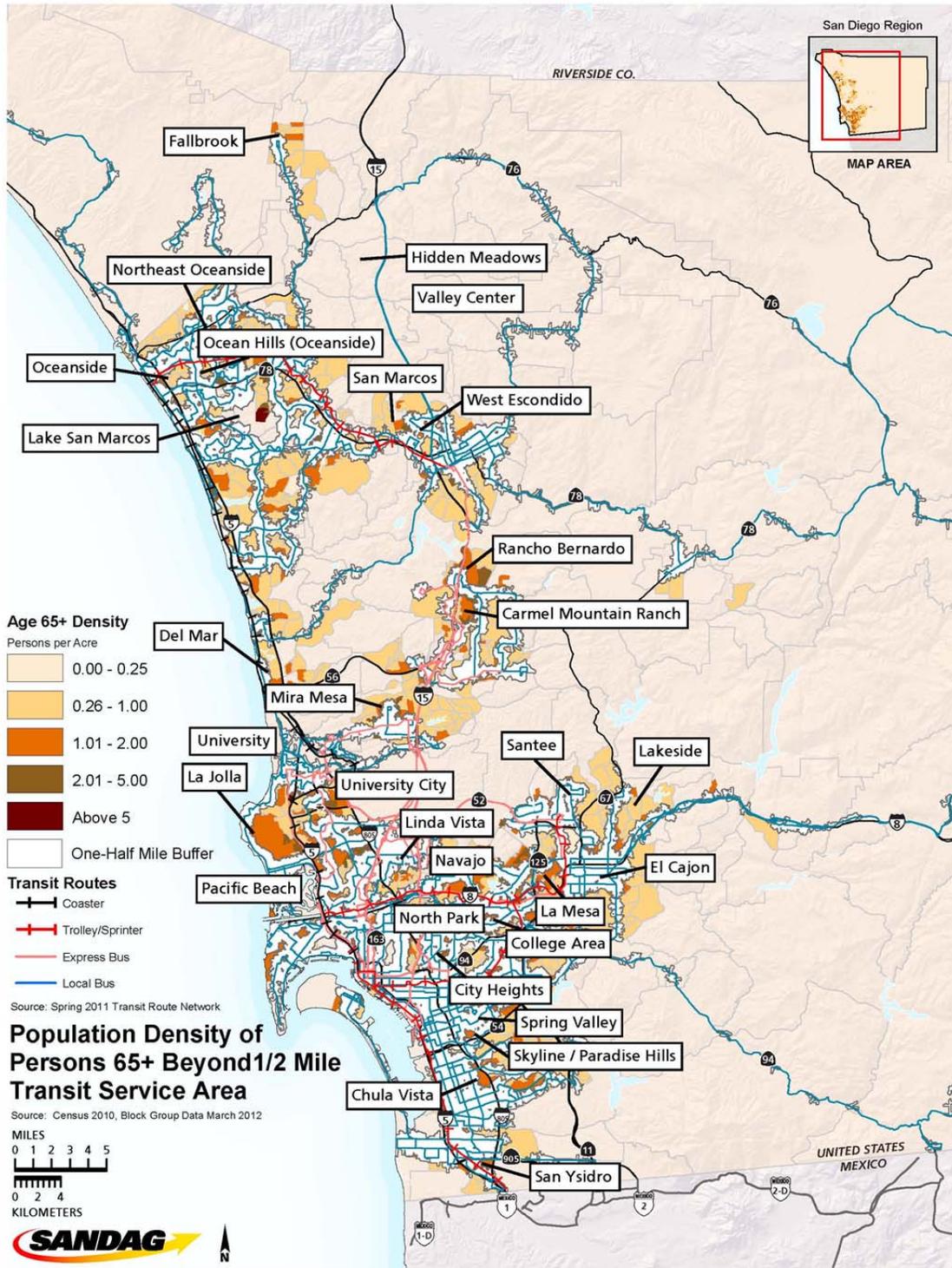


within the 2012-2016 timeframe of this Plan. Additionally, these regional services are also intended to serve as commuter park-and-ride services which garner a much larger population capture area than the half mile walking distances assumed in the maps. Future RTP services beyond the Coordinated Plan 2012-2016 timeframe are also recognized as meeting these transportation gaps in the future. These projects include future transit service on SR-56 and light rail to University City. Areas with identified transportation service gaps in fixed-route transit services are flagged on all of the maps in this chapter via “call-outs.”

► **Transit and Social Service Transportation Gaps — Seniors**

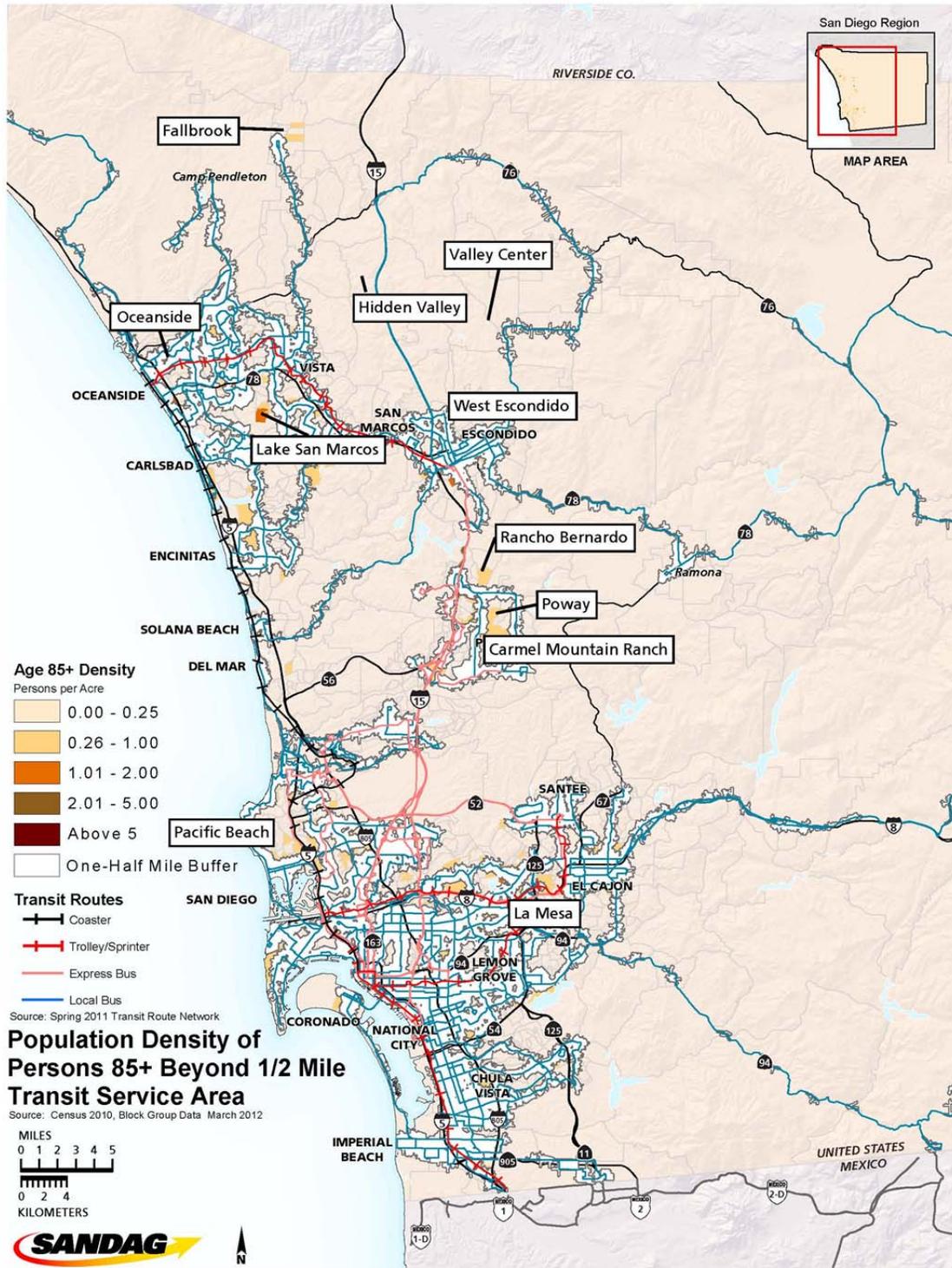
As Figure 6.2 demonstrates, significant transit coverage throughout most of the urbanized areas of the County is available to the senior populations age 65 and older. North County maintains coverage within proximity to all of the major freeways and rail (COASTER and SPRINTER) options. Pockets of areas not serviced by transit include East Oceanside, sections of Carlsbad east of Interstate 5, and areas south of State Route 78 as identified on the maps. While the majority of the southern urbanized San Diego region is covered within a half mile accessibility threshold to transit, some examples of the coverage exceptions are located within the La Jolla community, North La Mesa, Otay Mesa, and eastern portions of El Cajon.

Figure 6.2: Population Density of Persons 65+ Beyond ½ Mile Transit Service Area



As was discussed in Chapter 4, the needs of a 65 year old individual oftentimes vary from the more sensitive needs of a person age 85 and older. Though, as Figure 6.3 depicts, nearly no community is isolated from the half mile proximity to transit for this age demographic, the need for individuals to utilize this service is subject to one's physical, cognitive and sensory impairments. As seniors begin to reach this echelon, their needs are most likely to be met utilizing specialized transportation services.

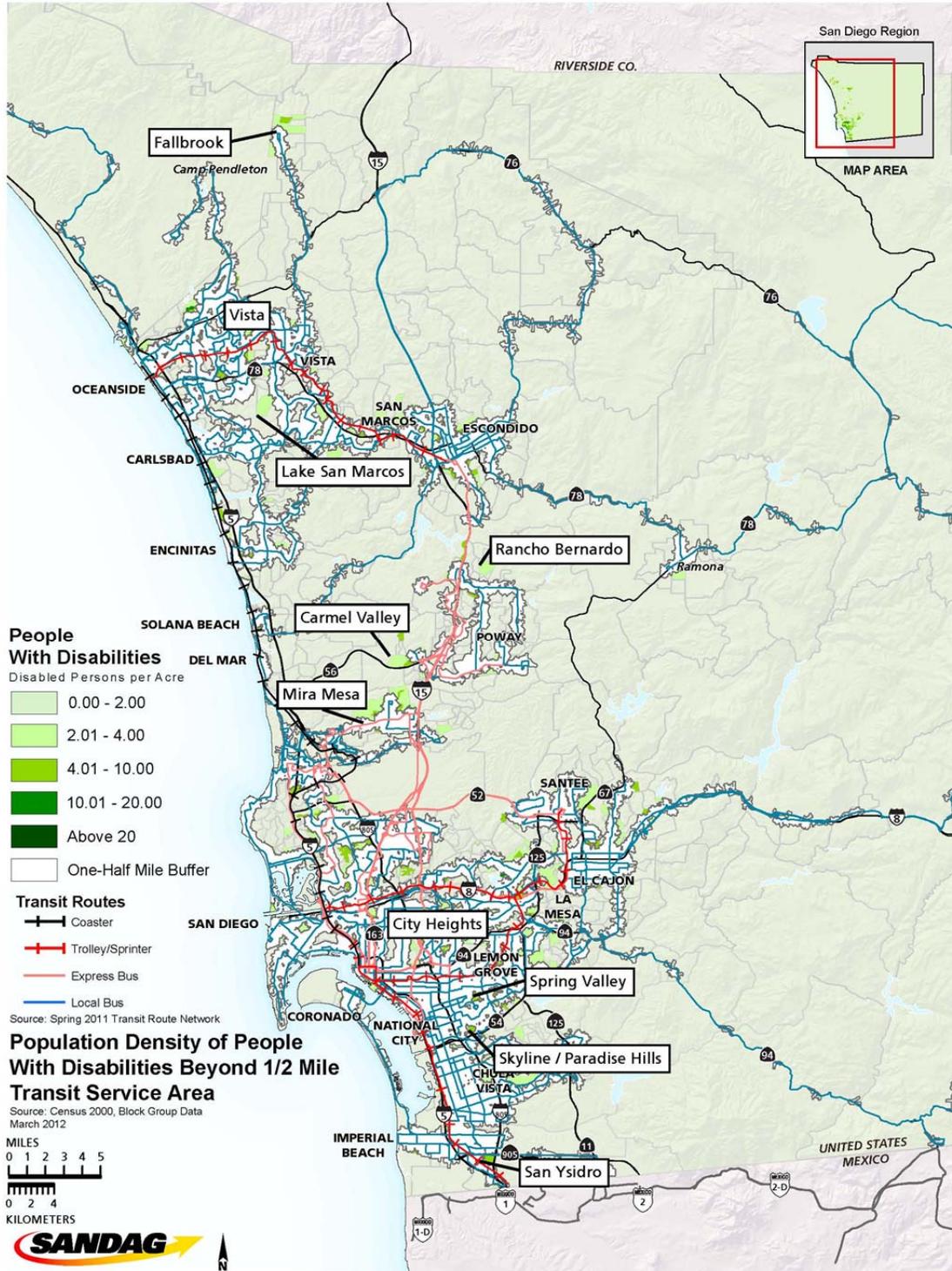
Figure 6.3: Population Density of Persons 85+ Beyond ½ Mile Transit Service Area



► **Transit and Social Service Transportation Gaps — Individuals with Disabilities**

The majority of concentrated populations of individuals with disabilities within the County directly corresponds to the general population map. Furthermore, most areas recording a high number of disabled persons are also reporting higher levels of people in poverty. This correlation coincides with a need for quality, cost-effective, accessible service in the low-income neighborhoods and service areas. Drawing from Figure 6.4, the majority of individuals living within a half mile distance from a transit stop or station are adequately serviced. Communities that lack sufficient coverage are Eastlake, Mira Mesa, and East Carlsbad. As ADA Paratransit serves individuals unable to use fixed-route transit up to three-quarters of a mile distance from a transit stop or station, the service coverage expands to include nearly all communities with large segments of disabled populations.

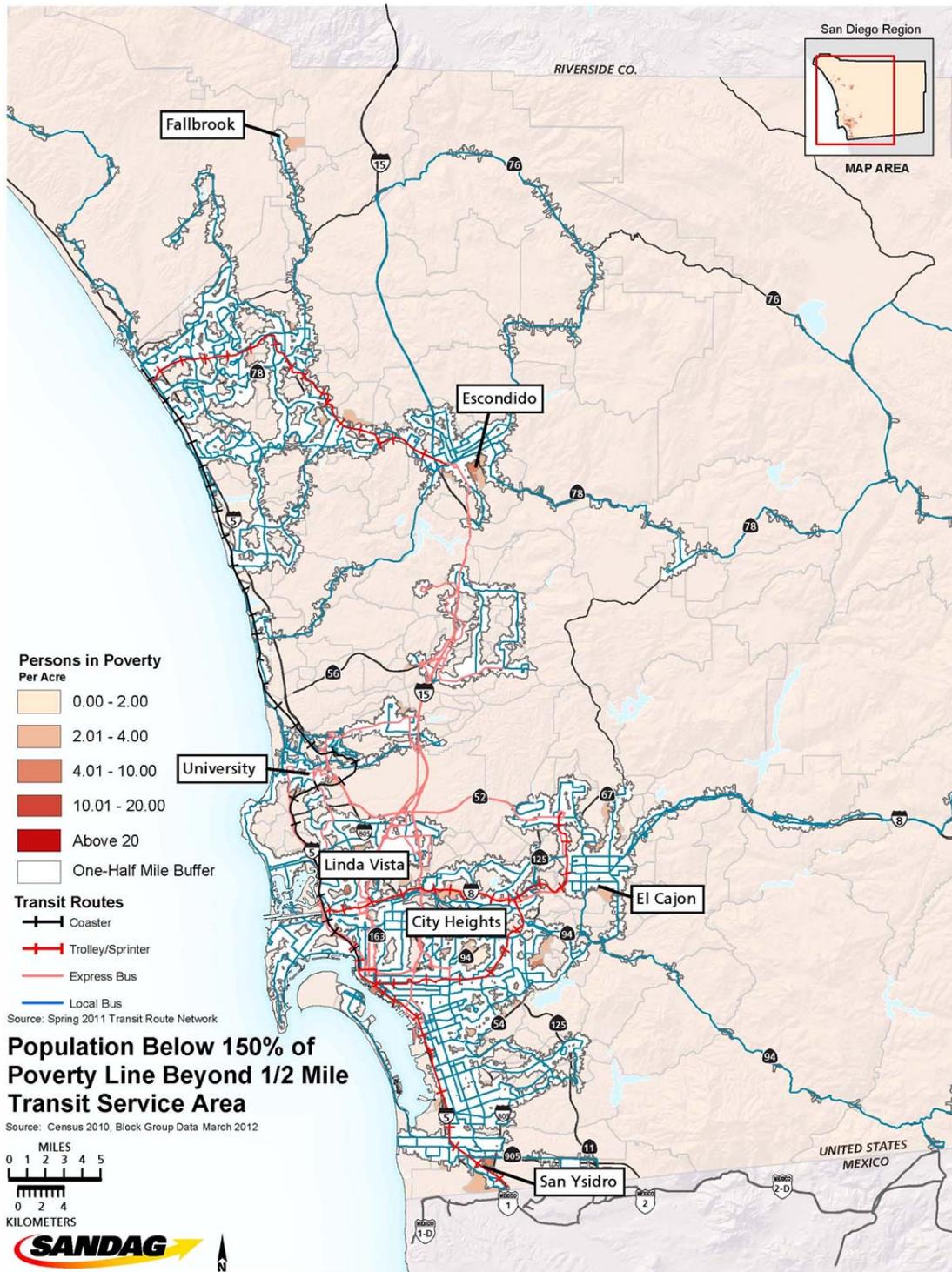
Figure 6.4: Population Density of People with Disabilities beyond ½ Mile Transit Service Area



► **Social Service Transportation Options— Individuals of Low-Income**

An assessment of those individuals in poverty was undertaken and based on the poverty rates defined in the federal Jobs Access and Reverse Commute (JARC) (Section 5316) program, which expands the assessment of poverty to include all individuals whose income level is below the 150 percent poverty-line threshold. Gaps in transportation service for this population sub-group are shown in Figure 6.5. These areas include San Ysidro, City Heights, El Cajon, Linda Vista, University City, Escondido and Fallbrook.

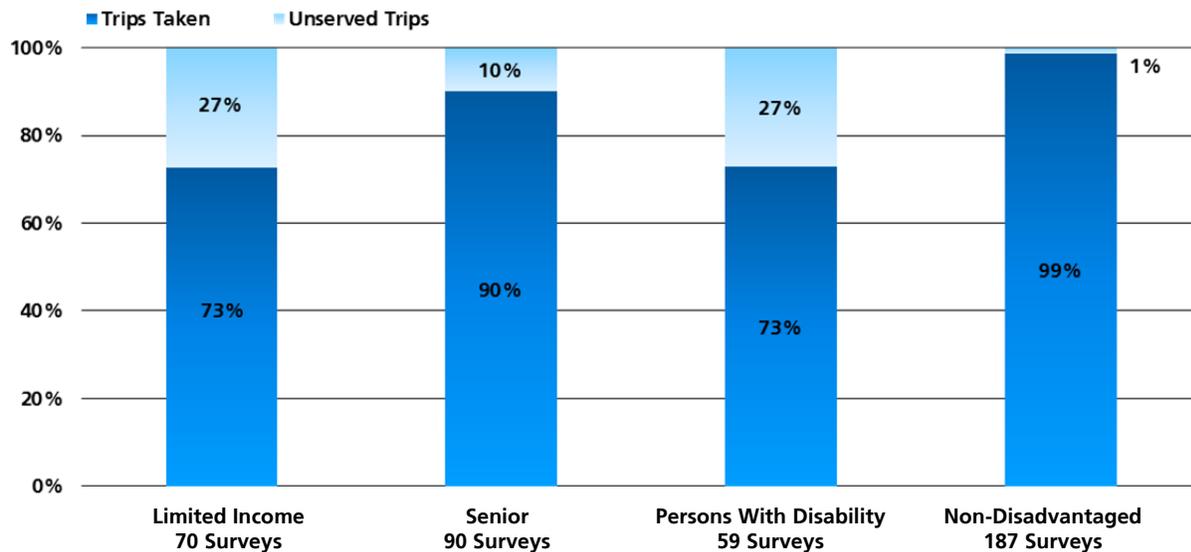
Figure 6.5: Population Below 150 Percent of Poverty Line beyond ½ Mile Transit Service Area



6.2 Rural Needs Analysis

While the current plan update utilizes new Census data to show population concentrations in the urbanized areas, the most recent 2010-2014 Coordinated Plan focused on developing an understanding of the unmet transportation needs in rural communities and continues to be relevant for this plan. The rural needs analysis was done through a four-step rural transportation study, including phone interviews with community leaders, a public survey, outreach meetings, and input from the Social Service Transportation Advisory Council (SSTAC). In particular, the survey enabled SANDAG to isolate trips that were not made because the respondent was unable to arrange transportation (referenced as “unserved” trips). Additionally, since specific personal demographic information was asked on the survey (age, income, disability, etc.), SANDAG was able to calculate the percentage of unserved trips by each transportation disadvantaged population group evaluated in this plan. Figure 6.6 illustrates the total rural unserved trips missed by population group.

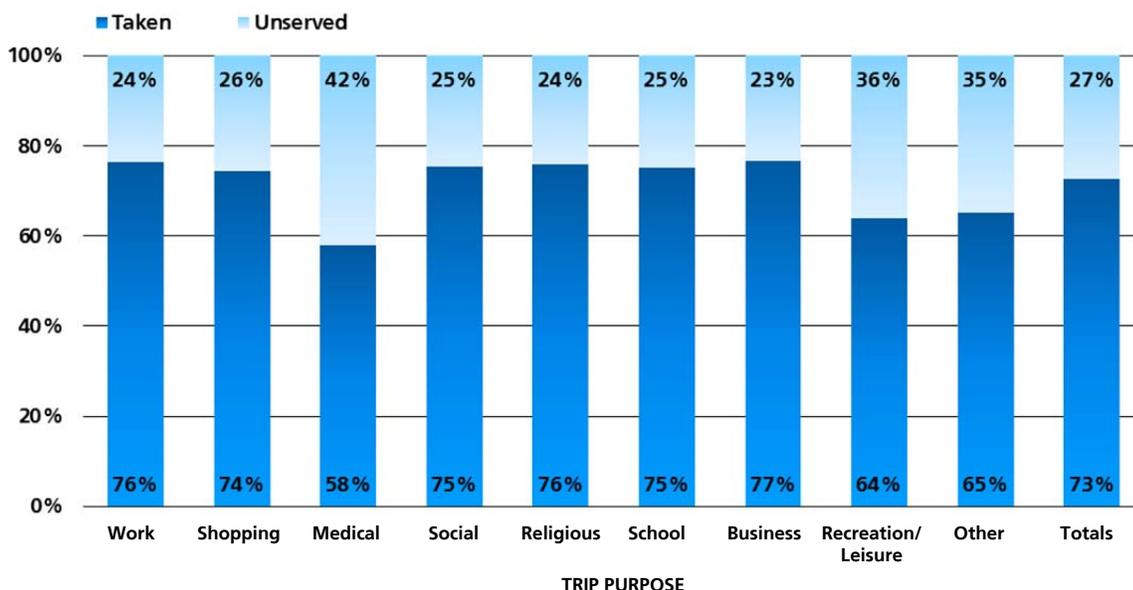
Figure 6.6: Total Rural Trips by Demographic



The significant difference between transportation disadvantaged groups and nondisadvantaged groups’ missed trips suggests that rural communities have a large need for increased and improved transportation and mobility solutions for their most sensitive populations. In particular, the survey identified that low-income individuals and persons with disabilities had the most unserved trips.

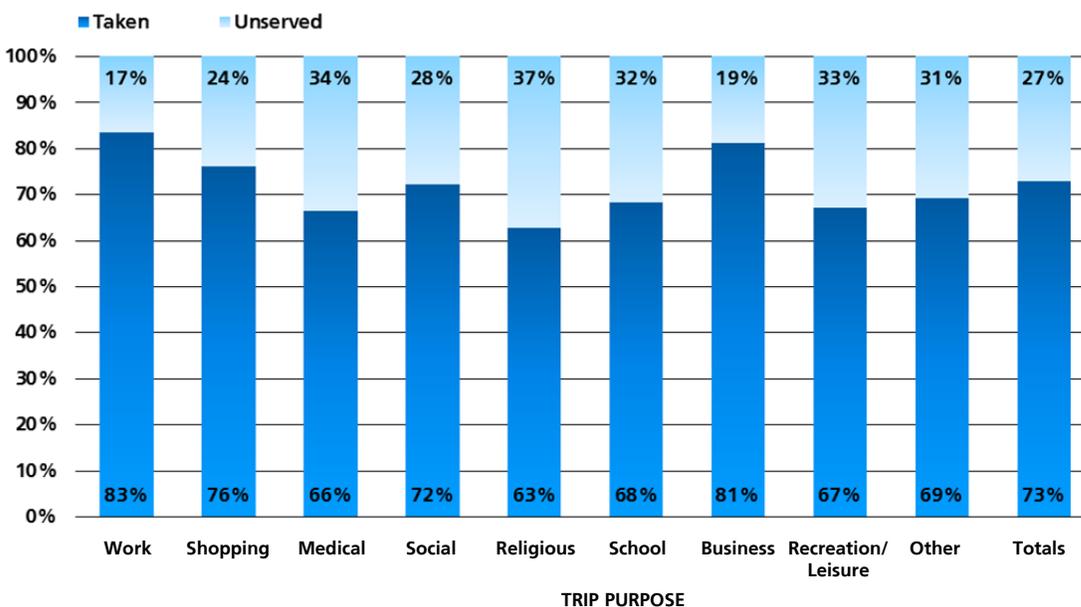
Since the rural transportation survey included the separation of trip purposes among eight categories, it was possible to determine the unserved trips by category for each of the three transportation disadvantaged population groups. Figures 6.7 through 6.9 illustrate this information for low-income individuals, disabled persons, and seniors.

Figure 6.7: Trip Demand for Persons with Limited Means



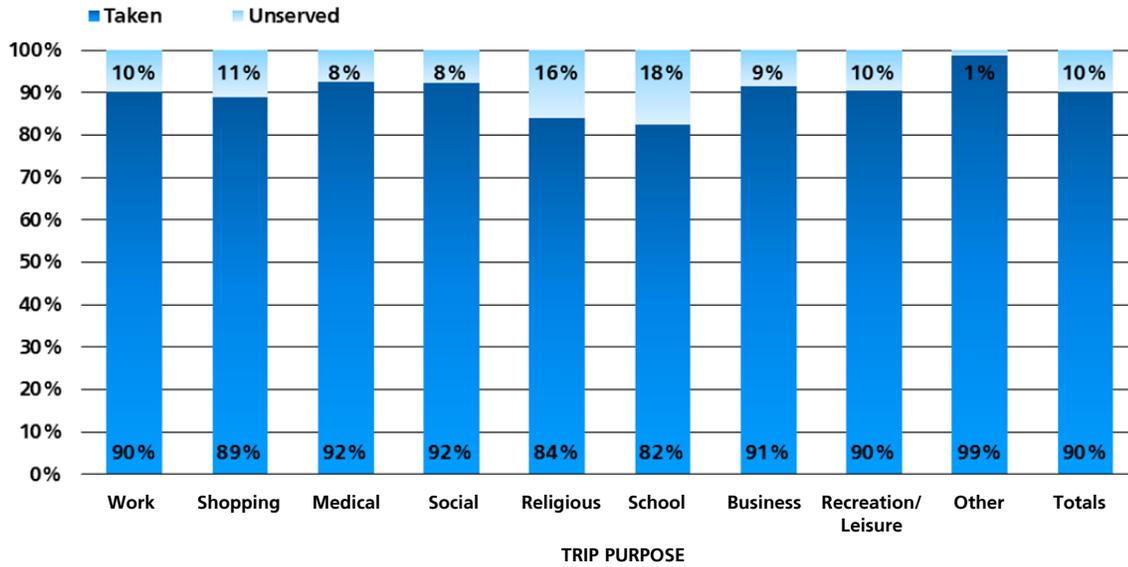
The analysis of low-income trips revealed that medical and recreation/leisure trips garnered the most responses for unserved trips (42 percent and 35 percent, respectively). It also was noted that a quarter of work-related trips for low-income persons went unserved, approximately double that of the unserved work trips for disabled individuals and seniors.

Figure 6.8: Trip Demand for Persons with Disabilities



The following chart includes all of the responses from persons with disabilities by trip type. For this particular transportation disadvantaged demographic, medical, religious, school, recreation/ leisure and other trips totaled unserved trip percentages over 30 percent. From the data, it appears that disabled transportation is most lacking for medical and quality-of-life trips.

Figure 6.9: Trip Demand for Seniors



The analysis of unserved trips by seniors (persons over 65), revealed that religious and school trips represented the largest category of unserved trips for this population by percent. Most of the other categories were at or near the 10-percent unserved trip level, similar to the overall senior average. This data showed that virtually every category included unmet senior transportation needs.

This same unserved trip analysis was performed for each of the following community planning areas:

- ▶ Ramona (including North Mountain, Julian, Cuyamaca, Central Mountain, and Barona);
- ▶ Borrego Springs;
- ▶ Valley Center (including Palomar Mountain, Pala-Pauma, Rainbow, Fallbrook, Bonsall, and Hidden Meadows); and
- ▶ Campo (including Alpine, Crest-Dehesa, Jamul, Otay, Potrero, Boulevard, Mountain Empire, Pine Valley and Jacumba).

6.3 Strategies - Coordination of Transportation Resources

The coordination of public transit and human services transportation has been a central theme of this plan since its inception and provides one of the key prioritized strategies. Generally speaking, coordination can help improve transportation service delivery, improve cost-effectiveness for service providers, eliminate gaps in service, and can remove real or perceived transportation barriers. Other benefits of coordinated transit and human services transportation services include:

▶ Economic Benefits

- ▶ Enhanced Mobility: Expanding the service area and hours increases employment opportunities for potential and underemployed workers;
- ▶ Increased Efficiency: Reducing the cost per vehicle-hours or miles traveled, potentially saving money for providers and users;
- ▶ Economies of Scale: Allows bulk purchasing of vehicles, insurance, maintenance, and training;
- ▶ Additional Funding: More total funding and greater number of funding sources; and
- ▶ Increased Productivity: More trips per month or passengers per vehicle-hour.

▶ Social Benefits:

- ▶ Allows Independence: Improves quality of life by providing access to work, medical needs, shopping, social events, and religious services for those who cannot drive; and
- ▶ Easy-to-Use System: Coordinated services are better publicized, reliable, and accessible for users with the potential of serving more destinations.

While there are numerous benefits of coordinating transportation services, there also are many existing barriers facing coordination. The following areas were identified which could be improved or coordinated to enhance efficiency and service delivery:

▶ Challenges

- ▶ Training and Maintenance: School districts, transit, paratransit, and other transportation providers operate their own training programs for drivers and own maintenance program for vehicles;
- ▶ Eligibility: Each transportation system has different eligibility requirements for riders precluding efficient coordination;
- ▶ Capital Cost and Purchasing: Each transportation system typically purchases its own equipment and vehicles;
- ▶ Reporting and Usage: Federal, state, and local funds used for transportation have different restrictions and reporting requirements;
- ▶ Funding Source Restrictions: Various sources of funding restrict different transportation service to specific populations for specific purposes; and
- ▶ Coordination of travel information across modes and systems: The availability of specialized services is not typically displayed in major information systems such as Google Transit, 5-1-1 or

via the transit operators (trip planners, web schedules, etc.). The public is given transit centric mobility options and are often unaware of other private or non-profit transportation services.

6.4 Mobility Management

Mobility management is a method of coordinating transportation resources to respond to the challenges listed above. As mentioned earlier, the San Diego region has a wide variety of transportation providers available to service the community's myriad of needs. While these services continue to provide transportation to their members and the general public (depending on the organization), barriers to access of these services still may exist. For individuals who do not have access to travel information or need assistance in locating service providers, mobility management acts as a resource to provide the community with a continuum of accessible transportation options. Mobility management is an innovative and resourceful solution toward consolidating transportation service delivery and focuses on providing the most appropriate service for each individual consumer. The activity pools together various transportation providers to offer catered services for its communities based on one's impairment, origin/destination, preferred cost of service, etc. Whereas typical transit agencies utilize a single service operator, this system is able to draw from multiple services which expands the available service coverage for an area and provides the most efficient and cost-effective service for riders. Additionally, mobility management programs provide travel training, broker and disseminate travel information, and further help to assist travel arrangements.

Mobility management includes the design and management of the transportation services so they can perform effectively and efficiently. Mobility management can have the following characteristics that distinguish it from the traditional transportation service development model:

- ▶ Disaggregated rather than aggregated service planning. Under the mobility management concept, the agency disaggregates markets, seeks to understand the individualized needs of those markets, and designs service strategies to effectively meet those needs.
- ▶ Service diversity rather than service uniformity. Most transportation systems are built on a principle of unified, fixed-route service coverage. Mobility management involves the development of a network of multiple services to serve a wide variety of needs.
- ▶ Multiple rather than a single provider. Under the mobility management arrangement, the agency looks to broker service to the most efficient and effective provider. The result is a transportation network of diverse providers rather than a single system.
- ▶ Service advocate rather than service provider. Transportation agencies, including transit agencies, generally focus on the direct provision of service delivery. Under mobility management, the agency views itself as a travel agent seeking the most effective strategy for meeting service needs.

Most mobility management programs are eligible for Federal Transportation Administration (FTA) capital expense funding that fund 80 percent mobility management expenses. SANDAG has awarded New Freedom grant funding to the region's Consolidated Transportation Services Agency (CTSA), for implementing a mobility management program for San Diego County. The FTA defines Mobility Management as "short term planning and management activities intended to coordinate transportation service modes in order to address the individualized needs of customers, in this case those within transportation disadvantaged populations, e.g., persons with disabilities, older adults,

youth, and individuals and lower income families.” Most management programs are eligible for FTA capital expense funding that fund 80 percent of mobility management expenses. SANDAG has awarded grant funding to the region’s designated Consolidated Transportation Services Agency (CTSA), of which is amidst implementing a pilot mobility management program for North County.

▶ **Voucher Programs**

Voucher programs are similar to Volunteer Driver Programs, but place the onus on the passenger to find someone to provide the needed ride. When someone provides the passenger with a ride they can give the driver a voucher which can be exchanged for reimbursement for driving. Vouchers can be given to friends, family, neighbors, or even strangers. The advantage of a voucher program is the relatively low overhead, but it may not work for people who do not have friends, family, or neighbors upon which they can call. During the last few years, two models for managing voucher systems have emerged.

- ▶ **Checkbook Model** – Customers receive a pre-printed checkbook with an allocation of miles or trips from the supporting agency. The customer trades the check for a ride with a volunteer. The support agency can help locate rides or offer trip planning support; however, customers may plan the trips themselves, thereby requiring less management on the part of the supporting agency. In either case, the supporting agency allocates vouchers and reimburses drivers. Although volunteer drivers are paid, the driver maintains volunteer status under IRS rules.

- ▶ **i-voucher Model** – The i-voucher model involves pre-printed rides with specified origins and destinations which contain information about mileage, value, and documentation (e.g., driver’s signature, rider data). Voucher sites reimburse drivers and invoice funding sources.

The Coordinated Plan



Chapter 7



Priorities for Project Funding

CHAPTER 7: PRIORITIES FOR PROJECT FUNDING

This chapter provides strategic direction to assist the San Diego Association of Governments (SANDAG) in selecting projects funded through the Job Access and Reverse Commute (JARC), New Freedom, and Senior Mini-Grant programs. The strategies in this section were developed to meet the regional transit and social service transportation needs as identified through the various outreach efforts, demographic research, survey efforts, and transportation inventory analysis completed over the last five years¹.

7.1 Requirement for Prioritization

Beginning with the 2008-2012 update of the Coordinated Plan, the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users required that the prioritization of projects and strategies be included in the Coordinated Plan in order for SANDAG to distribute federal funding through the JARC and New Freedom programs. While the 2010-2014 Plan was the first plan to include specific lists for the rural and urbanized area separately based on the research conducted in 2010 in the rural areas, the 2012-2016 edition of the plan continues to provide both an urban and rural list of priorities that recognize the distinct needs of each population. The need for project prioritization has become particularly valid over the past several years where SANDAG has received more requests for funding than are available for distribution.

The list of priorities prepared for the urban and rural areas were developed through an expansive public outreach program, which included members of the public, the transit agencies, stakeholders, and social service agencies. These priorities were then included with the comprehensive data analysis gathered via surveys and developed through the use of sophisticated geographic mapping techniques included in Chapter 6. The results are included in the following tables and have been organized and updated according to strategies that meet the needs of each population group identified in the plan. There are four priority levels ranging from “Very High Priorities” to “Low Priorities.” Areas that refer to “identified gaps in transportation service” refer to, but are not limited to, the assessment included in Chapter 6². Potential applicants for JARC, New Freedom, and Senior Mini-Grant funds may also wish to utilize the Census 2010 population maps identified in Chapter 4, and compare those to the availability of specialized transportation providers included and mapped in Chapter 5.

The prioritization is also relevant in assisting the State selection of projects for rural and non-urban areas. This plan also serves as a reference for decision making in situations where a new grant opportunity becomes available to this region. For example, when the Federal Transit Administration (FTA) recently announced availability of the Veterans Transportation and Community Living

¹ The elaborated list of issues and strategies from previous Coordinated Plan efforts are included in Appendix N.

² Gaps in service from previous Coordinated Plan efforts are retained in Appendix M.

Initiative (VTCLI) grant funds, SANDAG supported a project which was consistent with the Coordinated Plan priorities.

The priorities included in this chapter will assist SANDAG in its effort to continue the distribution of funding related to the Coordinated Plan in the most equitable manner possible. The priority tables are included in Tables 7.1 through 7.6.

Tables 7.1 - 7.6: Coordinated Plan Strategies

Table 7.1: Urban Coordinated Plan Strategies — Low-Income and Reverse Commute	
Priority	Strategy
Very High	Develop or expand transit and nonagency client transportation services in areas with little or no other transportation options (or replace services that have been cut in those areas, such as transit or school bus transportation) based on identified gaps in transportation services included in the Coordinated Plan.
Very High	Develop or expand transportation solutions in areas with sufficient densities to support transit (regional, inter-jurisdictional, and intra-jurisdictional transportation solutions) or coordinated services based on identified gaps in transportation services included in the Coordinated Plan.
High	Develop or enhance volunteer driver programs, including the support of volunteer driver coalitions.
High	Develop low-income/homeless and veteran solutions to school/education opportunities whenever none exist/were cut.
High	Develop centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage.
High	Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, and gas cards for volunteers.
High	Increase work-based weekday and weekend service/extend hours of operation based on identified gaps in service included in the Coordinated Plan.
High	Increase work-based weeknight service based on identified gaps in service included in the Coordinated Plan.
High	Provide travel training to encourage more individuals to ride regular transit.
High	Support collaborations between non-profit and private organizations to assist with transit pass subsidies.
Mid	Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate.
Mid	Develop or improve veteran medical and non-medical transportation.
Mid	Reduce transit travel time and transfers for low-income communities.
Mid	Develop transportation travel training services for non-English speaking populations.
Mid	Provide door-to-door service for trips such as nonemergency medical transportation in circumstances where transit is insufficient, inappropriate, or unavailable.
Mid	Expand public information regarding alternative transportation programs.
Mid	Provide demand responsive transportation for areas not served by fixed-route transit.
Mid	Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops.
Low	Community outreach and marketing of services.
Low	Create feeder to fixed-route service.
Low	Develop nonmotorized transportation programs (i.e., bicycle, etc.).
Low	Develop or expand car sharing programs.
Low	Enhance driver training program to improve passenger information.
Low	Enhance existing guaranteed ride home programs.
Low	Improve 511 Web site and other transit information sites.
Low	Improve bus public address systems.

Table 7.1: Urban Coordinated Plan Strategies — Low-Income and Reverse Commute (cont'd)

Priority	Strategy
Low	Improve dissemination of transit service change information.
Low	Improve information on routes and schedules for buses and trolley system.
Low	Improve real-time travel information on buses and trolleys.
Low	Increase COASTER service, including regular weekend service.
Low	Increase level of express transit service.
Low	Increase SPRINTER service, including weekend and late evening service.
Low	Increase weekend hours for fixed-route services.
Low	Install and maintain transit station amenities (shelters, seating, trash cans, and lighting).
Low	Install closed-circuit television devices and monitoring personnel at stations, including signage.
Low	Install in-vehicle closed-circuit television devices and operator monitoring equipment.
Low	Install pedestrian grade separations at COASTER stations.
Low	Provide additional feeder services to the Trolley and SPRINTER.
Low	Provide trips during off-peak hours and ensure midday coverage.
Low	Purchase and implement technology to promote cohesive use between public and private transportation providers.

Table 7.2: Urban Coordinated Plan Strategies — Individuals With Disabilities

Priority	Strategy
Very High	Develop or expand transit and non-agency client transportation services in areas with little or no other transportation options (or replace services that have been cut in those areas) based on identified gaps in transportation services included in the Coordinated Plan
Very High	Develop or expand transportation solutions in areas with densities to support transit (regional, inter-jurisdictional and intra-jurisdictional transportation solutions) or coordinated services based on identified gaps in transportation services included in the Coordinated Plan
High	Develop or enhance volunteer driver programs including the support of volunteer driver coalitions
High	Develop or expand transportation solutions for developmentally disabled individuals and veterans with service-related disabilities based on identified gaps in service included in the Coordinated Plan
High	Develop centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage
High	Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, and gas cards for volunteers
High	Increase weekday service based on identified gaps included in the Coordinated Plan
High	Increase weeknight and weekend service based on identified gaps in service included in the Coordinated Plan
High	Provide door-to-door service (and door-through-door when necessary) for trips such as nonemergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable

Table 7.2: Urban Coordinated Plan Strategies — Individuals With Disabilities (cont'd)

Priority	Strategy
High	Improve accessibility for individuals with disabilities through the provision of travel training for paratransit users to encourage more individuals to ride regular fixed-route transit; improved accessible travel paths to transit stops and stations; and retrofitting of existing bus stops to ensure accessibility and Americans with Disabilities (ADA) compliance.
High	Expand paratransit eligibility beyond the ¾-mile boundary.
Mid	Develop or improve veteran medical and non-medical transportation.
Mid	Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate.
Mid	Replace specialized transportation vehicles that are beyond their useful life.
Mid	Enhance sensitivity training for drivers particularly for those assisting passengers with developmental disabilities.
Mid	Improve accessible travel paths to transit stops and stations.
Mid	Increase timeliness, flexibility, and reliability of pickup for ADA paratransit services.
Mid	Retrofit existing bus stops to ensure accessibility and ADA compliance.
Mid	Shorten ADA trip request windows for pickup times.
Mid	Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops.
Low	Community outreach and marketing of services.
Low	Enhance driver training program to improve passenger information.
Low	Improve 511 Web site and other transit information sites.
Low	Improve bus public address systems.
Low	Improve dispatch equipment communication system to ensure that passengers will be transported in the most appropriate vehicle
Low	Improve dissemination of transit service change information.
Low	Improve information on routes and schedules for buses and trolley system.
Low	Improve real time travel information on buses and trolleys.
Low	Include vehicles that can accommodate larger chairs in fleet.
Low	Increase COASTER service, including regular weekend service.
Low	Increase level of express transit service.
Low	Increase paratransit service hours.
Low	Increase SPRINTER service, including weekend and late evening service.
Low	Increase the physical in-vehicle space for wheelchair passengers.
Low	Increase weekend hours for fixed-route services.
Low	Install and maintain transit station amenities (shelters, seating, trash cans, and lighting).
Low	Install closed-circuit television devices and monitoring personnel at stations, including signage.
Low	Install in-vehicle closed-circuit television devices and operator monitoring equipment.

Table 7.2: Urban Coordinated Plan Strategies — Individuals With Disabilities (cont'd)

Priority	Strategy
Low	Install pedestrian grade separations at COASTER stations.
Low	Provide additional feeder services to the Trolley and SPRINTER.
Low	Provide an assistance program for individuals trying to become ADA-certified.
Low	Provide taxi vouchers.
Low	Provide transportation system guides.
Low	Provide trips during off-peak hours and ensure midday coverage.
Low	Purchase and implement technology to promote cohesive use between public and private transportation providers.
Low	Study impact of further reducing fares for ADA-certified on regular transit.

Table 7.3: Urban Coordinated Plan Strategies — Seniors

Priority	Strategy
Very High	Develop or expand transit and nonagency client transportation services in areas with little or no other transportation options (or replace services that have been cut in those areas) based on identified gaps in transportation services included in the Coordinated Plan.
Very High	Develop or expand transportation solutions in areas with sufficient densities to support transit (regional, inter-jurisdictional, and intra-jurisdictional transportation solutions) or coordinated services based on identified gaps in transportation services included in the Coordinated Plan.
High	Develop or enhance volunteer driver programs, including the support of volunteer driver coalitions.
High	Develop centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage to maximize service coverage areas.
High	Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, and gas cards for volunteers.
High	Increase weekday and weekend service based on identified gaps in service included in the Coordinated Plan.
High	Provide door-to-door service (and door-through-door when necessary) for trips such as non-emergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable.
High	Provide travel training to encourage more individuals to ride regular transit.
Mid	Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate.
Mid	Replace specialized transportation vehicles that are beyond their useful life.
Mid	Expand public information regarding alternative transportation programs.
Mid	Provide demand responsive transportation for areas not served by fixed-route transit.
Mid	Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops.
Low	Community outreach and marketing of services.
Low	Create feeder to fixed-route service.
Low	Enhance driver training program to improve passenger information.

Table 7.3: Urban Coordinated Plan Strategies — Seniors (cont'd)

Priority	Strategy
Low	Improve 511 Web site and other transit information sites.
Low	Improve bus public address systems.
Low	Improve dissemination of transit service change information.
Low	Improve information on routes and schedules for buses and trolley system.
Low	Improve real-time travel information on buses and trolleys.
Low	Increase COASTER service, including regular weekend service.
Low	Increase level of express transit service.
Low	Increase operating hours of accessible health and human service transportation vehicles.
Low	Increase SPRINTER service, including weekend and late evening service.
Low	Install and maintain transit station amenities (shelters, seating, trash cans, and lighting).
Low	Install closed-circuit television devices and monitoring personnel at stations, including signage.
Low	Install in-vehicle closed-circuit television devices and operator monitoring equipment.
Low	Install pedestrian grade separations at COASTER stations.
Low	Provide additional feeder services to the Trolley and SPRINTER.
Low	Install closed-circuit television devices and monitoring personnel at stations, including signage.
Low	Install in-vehicle closed-circuit television devices and operator monitoring equipment.
Low	Install pedestrian grade separations at COASTER stations.
Low	Provide additional feeder services to the Trolley and SPRINTER.
Low	Provide transportation system guides.
Low	Provide trips during off-peak hours and ensure midday coverage.
Low	Purchase and implement technology to promote cohesive use between public and private transportation providers.

Table 7.4: Rural Coordinated Plan Strategies — Low-Income Individuals and Reverse Commuters

Priority	Strategy
Very High	Develop or enhance volunteer driver programs, including the support of volunteer driver coalitions.
Very High	Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage based on the identified gaps in transportation services included in the Coordinated Plan.
High	Improve transportation serving rural areas based on the identified gaps in transportation services (such as cuts in transit or school bus transportation) included in Chapter 7.
High	Develop or expand work related vanpool or carpool programs.
Mid	Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate.
Mid	Increase service to medical centers.
Mid	Expand public information regarding alternative transportation programs.

Table 7.4: Rural Coordinated Plan Strategies — Low-Income Individuals and Reverse Commuters (cont'd)

Priority	Strategy
Mid	Extend hours of operation and increase early morning and late-night service.
Mid	Provide demand responsive transportation for areas not served by fixed-route transit.
Mid	Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops.
Low	Community outreach and marketing of services.
Low	Develop nonmotorized transportation programs (i.e., bicycle, etc.).
Low	Develop or expand car-sharing programs.
Low	Encourage coordination among school districts.
Low	Enhance driver training program to improve passenger information.
Low	Enhance existing guaranteed ride home programs.
Low	Improve 511 Web site and other transit information sites.
Low	Improve information on routes and schedules for buses.
Low	Improve real-time travel information on buses.
Low	Create additional bus stop locations.
Low	Increase transportation service frequency.
Low	Install in-vehicle closed-circuit television devices and operator monitoring equipment.
Low	Provide trips during off-peak hours and ensure midday coverage.
Low	Improve transportation options for displaced fire victims and farm workers.
Low	Fund one position for rural communities for an "access coordinator" to work on the transportation issue continuously.
Low	Provide consultation for program design to potential service providers in rural communities.
Low	Provide for grant proposal writing in rural communities.
Low	Develop or enhance voucher programs.
Low	Provide trips to regional transit centers.
Low	Develop Park-and-Ride stations.
Low	Increase service to shopping centers.
Low	Create feeder to fixed-route service.
Low	Purchase and implement technology to promote cohesive use between public and private transportation providers.

Table 7.5: Rural Coordinated Plan Strategies — Individuals With Disabilities

Priority	Strategy
Very High	Develop or enhance volunteer driver programs including the support of volunteer driver coalitions.
Very High	Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage based on the identified gaps in transportation services included in the Coordinated Plan.
High	Improve transportation serving rural areas based on the identified gaps in transportation services included in Chapter 7 and Appendix M.
High	Provide door-to-door service (and door-through-door when necessary) for trips such as nonemergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable.
High	Improve accessibility for individuals with disabilities through: the provision of travel training for paratransit users to encourage more individuals to ride regular fixed-route transit, improved accessible travel paths to transit stops and stations, and retrofitting existing bus stops to ensure accessibility and ADA compliance.
Mid	Replace specialized transportation vehicles that are beyond their useful life.
Mid	Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate.
Mid	Enhance sensitivity training for drivers particularly for those assisting passengers with developmental disabilities.
Mid	Increase timeliness, flexibility, and reliability of pickup for ADA paratransit services.
Mid	Shorten ADA trip request windows for pickup times.
Mid	Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops.
Low	Provide trips to regional transit centers.
Low	Community outreach and marketing of services.
Low	Create feeder to fixed-route service.
Low	Enhance driver training program to improve passenger information.
Low	Expand paratransit eligibility beyond the ¾-mile boundary.
Low	Improve 511 Web site and other transit information sites.
Low	Improve bus public address systems.
Low	Improve dispatch equipment communication system to ensure that passengers will be transported in the most appropriate vehicle.
Low	Improve dissemination of transit service change information.
Low	Improve real-time travel information on buses.
Low	Include vehicles that can accommodate larger chairs in fleet.
Low	Increase operating hours of accessible health and human service transportation vehicles.
Low	Increase paratransit service hours.
Low	Increase the physical in-vehicle space for wheelchair passengers.
Low	Increase weekend hours for fixed-route services.

Table 7.5: Rural Coordinated Plan Strategies — Individuals With Disabilities (cont'd)

Priority	Strategy
Low	Install in-vehicle closed-circuit television devices and operator monitoring equipment.
Low	Provide an assistance program for individuals trying to become ADA-certified.
Low	Provide taxi vouchers.
Low	Provide transportation system guides.
Low	Provide trips during off-peak hours and ensure midday coverage.
Low	Purchase and implement technology to promote cohesive use between public and private transportation providers.
Low	Fund one part-time position for rural communities for an "access coordinator" to work on the transportation issue continuously.
Low	Provide consultation for program design to potential service providers in rural communities.
Low	Provide technical assistance or grant proposal writing in rural communities.
Low	Improve accessible travel paths to transit stops and stations.
Low	Pave sidewalks to bus stops.
Low	Study impact of further reducing fares for ADA-certified on regular transit.

Table 7.6: Rural Coordinated Plan Strategies — Seniors

Priority	Strategy
Very High	Develop or enhance volunteer driver programs including the support of volunteer driver coalitions.
Very High	Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage based on the identified gaps in transportation services included in the Coordinated Plan.
High	Improve transportation serving rural areas based on the identified gaps in transportation services included in the Coordinated Plan.
High	Improve transportation serving rural areas based on the identified gaps in transportation services included in Chapter 7 and Appendix M.
High	Increase service to medical centers.
High	Provide door-to-door service (and door-through-door when necessary) for trips such as low-cost, nonemergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable.
Mid	Create feeder to fixed-route service.
Mid	Replace specialized transportation vehicles that are beyond their useful life.
Mid	Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate.
Mid	Expand public information regarding alternative transportation programs.
Mid	Provide demand responsive transportation for areas not served by fixed-route transit.
Mid	Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops.
Low	Community outreach and marketing of services.
Low	Enhance driver training program to improve passenger information.

Table 7.6: Rural Coordinated Plan Strategies — Seniors (cont'd)

Priority	Strategy
Low	Improve 511 Web site and other transit information sites.
Low	Improve bus public address systems.
Low	Improve dissemination of transit service change information.
Low	Improve information on routes and schedules for buses.
Low	Improve real-time travel information on buses.
Low	Increase operating hours of accessible health and human service transportation vehicles.
Low	Install in-vehicle closed-circuit television devices and operator monitoring equipment.
Low	Provide taxi vouchers.
Low	Provide trips during off-peak hours and ensure midday coverage.
Low	Purchase and implement technology to promote cohesive use between public and private transportation providers.
Low	Fund one part-time position for rural communities, for an "access coordinator" to work on the transportation issue continuously.
Low	Provide consultation for program design to potential service providers in rural communities.
Low	Provide technical assistance or grant proposal writing in rural communities.
Low	Create feeder to fixed-route service.
Low	Provide trips to regional transit centers.
Low	Develop Park-and-Ride stations to support additional carpools and ridesharing.
Low	Increase service to shopping centers.

The Coordinated Plan



Chapter 8



Funding

CHAPTER 8: FUNDING

Public transit and human service transportation in San Diego is funded from a variety of public and private sources. This chapter only addresses services that are in whole or partly funded with money from public transportation funding programs, which include federal, state, and local sources.

8.1 Federal

The federal highway, mass transit, and surface transportation safety programs are periodically authorized in a multi-year surface transportation reauthorization bill. The 2005 reauthorization act, the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), was extended until July 6, 2012. On this date, President Obama signed into law the new surface transportation bill, Moving Ahead for Progress in the 21st Century (MAP-21). Based on annual levels established in the authorizing legislation, Congress then appropriates funds for transportation programs. Current funding for the New Freedom and the Job Access and Reverse Commute (JARC) specialized transportation programs is available from SAFETEA-LU for Federal Fiscal Year (FY) 2012 and will be apportioned in late 2012. MAP-21 funding will apply to future years, including the Federal FY 2013 and 2014 apportionments.

► Federal Transit Administration Section 5307 (Urbanized Area Formula Program)

The Urbanized Area Formula Program makes federal resources available to urbanized areas for transit capital and operating assistance and for transportation-related planning. An urbanized area is an incorporated area with a population of 50,000 or more that is designated as such by the Census Bureau. Eligible activities include planning, engineering, design, and evaluation of transit projects and other technical transportation-related studies, capital investments in bus and bus-related activities, and capital investments in new and existing fixed guideway systems. For urbanized areas with populations less than 200,000, operating assistance is an eligible expense. The urbanized area of San Diego County from Census 2010 is shown in Figure 8.1.

Because the San Diego urbanized area has a population larger than 200,000, the Section 5307 program does not provide assistance for operating costs such as operator salaries and overhead, but based on the need to maintain federally funded assets, this program enables transit agencies to use their Section 5307 apportionments to pay the cost of maintaining those assets. The provision, called preventive maintenance, allows the transit operators to recover up to 80 percent of their total maintenance costs from this source. This provision is applicable to all modes; however, use of these funds for this purpose is likely to be at the expense of funding ongoing capital needs, such as bus and other equipment replacements. Starting in FY 2012, the Federal Transit Administration (FTA) included fuel costs (including utility costs for the population of electric vehicles) as an eligible capital maintenance item for FY 2012 under the Section 5307 Urbanized Area Formula Program.

Two other special provisions under Section 5307 may be employed to direct these capital funds toward operations: the Capital Cost of Contracting and Americans with Disabilities Act (ADA) Services provisions. Capital Costs of Contracting allows the transit agencies to use the Section 5307 funds to pay a portion of costs of operating contracts based on the amount of capital being provided by the contractor. The proportions vary based on the type of contract and whether the contractor provides vehicles. The transit agencies may pay up to 80 percent of the ADA operating contracts with Section 5307 funds instead of using those funds for ongoing capital needs.

Urbanized Area Formula Program funds appropriated by Congress are apportioned annually by the FTA. Funds apportioned by the FTA under the Urbanized Area Formula Program remain available to the recipient for four fiscal years—the year of the apportionment, plus three additional years.

The San Diego Association of Governments (SANDAG) is the designated recipient of the Section 5307 funds and allocates these funds to the transit agencies after a portion is set aside for SANDAG planning purposes. SANDAG policy has been to allocate 70 percent of the remaining funds to Metropolitan Transit System (MTS) and 30 percent to the North County Transit District (NCTD). Section 5307 funding for prior years and projected years are included in Appendix B, Table B.11.

► **FTA Section 5309 (Fixed Guideway)**

This federal formula program is available to fixed guideway agencies with systems in operation for at least seven years. The term “fixed guideway” refers to any transit service that uses exclusive or controlled rights-of-way or rails, entirely or in part. The term includes heavy rail, commuter rail, light rail, trolleybus, aerial tramway, inclined plane, cable car, automated guideway transit, ferryboats, that portion of motor bus service operated on exclusive or controlled rights-of-way, and high occupancy vehicle (HOV) lanes. These program funds must be used only for fixed guideway projects, including preventive maintenance. These funds require a nonfederal match of 20 percent to the federal 80 percent contribution.

Like Section 5307 funds, Fixed Guideway Modernization funds are authorized under SAFETEA-LU and are appropriated annually by Congress. FTA apportions these funds to the regions based on a complicated tiered formula using various factors including revenue-miles and route-miles. SANDAG allocates these funds to MTS and NCTD using the same 70/30 distribution as Section 5307. Section 5309 Fixed Guideway funding for prior and projected years are included in Appendix B, Table B.11.

► **FTA Section 5310 Formula Funds for Service to Elderly Individuals and Individuals with Disabilities**

The goal of the Section 5310 program is to improve mobility for seniors and individuals with disabilities throughout the country. These funds can be used for capital purposes only such as vehicle replacement, or the procurement of radios or computers to support transportation operations. Funding is apportioned to the states by a formula. The State of California, through the actions of the California Department of Transportation (Caltrans) and the California Transportation Commission (CTC), allocates the funds on a competitive basis.

The primary recipients of these funds are nonprofit agencies that provide transportation for seniors and persons with disabilities; however, public transit agencies may apply if they can show that no nonprofits are readily available to provide service for which the capital funds are requested. Table 8.1 shows the FY 2010-2011 Section 5310 programs funded through the Coordinated Plan (FTA C 9040.1F). SANDAG also assists prospective grantees with the development and refinement of their

5310 applications, hosts workshops, forms a Local Review Committee to complete preliminary scoring of applications, and delivers the project list with scores to Caltrans Division of Mass Transportation.

Table 8.1: FTA Section 5310 Programs Funded Through the Coordinated Plan

5310 Project Awards - FY 2010 - 2011			
Agency	Project Vehicle Type	Type	Total Project \$
Charles I Cheneweth Foundation	Software	OE	\$11,741
Charles I Cheneweth Foundation	Medium Bus	R	\$65,000
Charles I Cheneweth Foundation	Medium Bus	R	\$65,000
City of Vista	Large Bus	R	\$70,000
Development Services Continuum, Inc.	Small Bus	R	\$60,000
Development Services Continuum, Inc.	Minivan	R	\$44,000
Development Services Continuum, Inc.	Small Bus	SE	\$60,000
Friends of Adult Day Health Care Centers	Small Bus	SE	\$60,000
Full Access & Coordinated Transportation, Inc.	Small Bus	SE	\$60,000
Full Access & Coordinated Transportation, Inc.	Small Bus	SE	\$60,000
Full Access & Coordinated Transportation, Inc.	Small Bus	SE	\$60,000
Full Access & Coordinated Transportation, Inc.	Small Bus	SE	\$60,000
Full Access & Coordinated Transportation, Inc.	Small Bus	SE	\$60,000
Full Access & Coordinated Transportation, Inc.	Small Bus	SE	\$60,000
Full Access & Coordinated Transportation, Inc.	Small Bus	SE	\$60,000
Jewish Family Services of San Diego	Larger Bus	R	\$105,000
Jewish Family Services of San Diego	Large Bus	SE	\$70,000
Jewish Family Services of San Diego	Larger Bus	SE	\$105,000
Jewish Family Services of San Diego	Minivan	R	\$44,000
Palomar Pomerado North County Health Development, Inc.	Small Bus	SE	\$60,000
Palomar Pomerado North County Health Development, Inc.	Small Bus	SE	\$60,000
Redwood Senior Homes & Services (Redwood Elderlink)	Larger Bus	R	\$105,000
Redwood Senior Homes & Services (Redwood Elderlink)	Large Bus	SE	\$70,000
San Diego Center for the Blind	Medium Bus	R	\$65,000
San Diego Center for the Blind	Medium Bus	R	\$65,000

Table 8.1: FTA Section 5310 Programs Funded Through the Coordinated Plan (Continued)

San Diego Center for the Blind	Small Bus	SE	\$60,000
San Diego Center for the Blind	Medium Bus	SE	\$65,000
Sharp Healthcare Foundation	Large Bus	R	\$70,000
St. Madeleine Sophie's Center	Large Bus	R	\$70,000
St. Madeleine Sophie's Center	Large Bus	R	\$70,000
St. Madeleine Sophie's Center	Large Bus	R	\$70,000
St. Madeleine Sophie's Center	Small Bus	R	\$60,000
St. Madeleine Sophie's Center	Small Bus	R	\$60,000
St. Madeleine Sophie's Center	Small Bus	R	\$60,000
St. Madeleine Sophie's Center	Larger Bus	SE	\$105,000
St. Madeleine Sophie's Center	Larger Bus	SE	\$105,000
St. Madeleine Sophie's Center	Minivan	SE	\$44,000
St. Madeleine Sophie's Center	Minivan	SE	\$44,000
St. Madeleine Sophie's Center	Minivan	SE	\$44,000
T.E.R.I., Inc.	Medium Bus	R	\$65,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Large Bus	R	\$70,000
The City Link Foundation	Software- Route Planning	OE	\$23,922
The City Link Foundation	Hardware GPS System	OE	\$8,044
The City Link Foundation	Hardware-Large Monitor	OE	\$1,564
The City Link Foundation	Maintenance Equipment: Brake lathe air compressor, wheel balancer floor jacks	OE	\$38,687
Valley Center Community Recreation Center	Medium Bus	SE	\$65,000
Valley Center Community Recreation Center	Medium Bus	SE	\$65,000
Total Project Award			\$3,358,958

► FTA Section 5311 Non-Urbanized Area Formula Funds

Whereas Section 5307 funds urbanized areas over 50,000 people, Section 5311 non-urbanized areas to the states according to a statutory formula based on each state's population in rural and urbanized areas. In California, Caltrans allocates the Section 5311 funds to counties on a rural population basis. NCTD receives 59 percent of the funding and MTS receives 41 percent. These funds may be used for operations requiring a dollar-for-dollar match. They may be used for capital at an 80/20 federal to nonfederal ratio. Section 5311 funding for prior and projected years are included in Appendix B, Table B.11.

► FTA Section 5311(f) Intercity Bus Program

A subsidiary program under the Section 5311 program, the Section 5311(f) program was created to help provide an intercity bus transportation system designed to address the intercity bus transportation needs of the entire state by providing financial assistance for operating, capital, and/or planning grants that support three national objectives:

- To support the connection between non-urbanized areas and the larger regional or national system of intercity bus service;
- To support services to meet the intercity travel needs of residents in non-urbanized areas; and
- To support the infrastructure of the intercity bus network through planning and marketing assistance and capital investment in facilities.

This program, while discretionary, is included in this list of recurring sources because the region's two transit agencies have been successful in obtaining these funds to support rural operations and capital needs.

► FTA Section 5316 Job Access and Reverse Commute

The goal of the JARC program is to improve access to transportation services to employment and employment-related activities for welfare recipients and eligible low-income individuals and to transport residents of urbanized areas and non-urbanized areas to suburban employment opportunities.

This program provides financial assistance for transportation services planned, designed, and carried out to meet the transportation needs of eligible low-income individuals and of reverse commuters regardless of income. The program requires coordination of federally assisted programs and services in order to make the most efficient use of federal resources. The formula for JARC funds is based on the number of eligible low-income and welfare recipients in urbanized and rural areas. The region may use up to 10 percent of the JARC funds for planning, administration, and technical assistance.

JARC funding is allocated by formula to states for areas with populations below 200,000 persons, and to designated recipients for areas with populations of 200,000 persons and above. SANDAG serves as the designated recipient for the San Diego urbanized area, and Caltrans serves as the designated recipient for the San Diego County rural areas. SANDAG and Caltrans allocate these funds on a competitive basis, based on a separate call-for-projects. All projects must be derived from the Coordinated Plan (FTA C 9040.1F), which serves as the federally mandated, locally developed transit and human service transportation plan.

To broaden the applicability of this program, the sources for matching funds are expanded. While most FTA programs must be matched with nonfederal funds, the JARC funds may be matched with other federal funds as long as that match does not come from other Department of Transportation sources. This encourages coordination with other programs, such as those funded by the Department of Health and Human Services.

The JARC funds may be used for operating at a 50 percent share or for capital at an 80 percent JARC share. In the first years of SAFETEA-LU, grants were awarded by SANDAG for three bus services operated by MTS and a bus stop improvement program at NCTD. The specific projects funded through the JARC program are shown in Table 8.2. Funding will be available under the JARC program for Federal FY 2012.

Table 8.2: JARC Programs Funded Through the Coordinated Plan

JARC		Project Awards						
Project	Agency	FY06	FY07	FY08	FY09	FY10	FY11	Total
ComLink Transportation	ACT				\$60,000			\$60,000
Employment Trans for Refugees	IRC				\$60,101	\$143,738		\$203,839
Vehicle Procurement	St. Madeleine's Sophie Center				\$125,562	\$91,098	\$152,800	\$369,460
Casa Raphael Transportation	Alpha Project				\$103,649			\$103,649
Route 905	MTS	\$433,350	\$453,258	\$252,239	\$450,793	\$277,303	\$190,585	\$2,057,528
Route 960	MTS	\$83,068	\$101,023	\$101,401	\$101,863	\$160,820	\$157,187	\$705,362
Route 30	MTS	\$262,037	\$370,008	\$379,316	\$388,633	\$406,674		\$1,806,668
HASTOP	MTS				\$62,832			\$62,832
Route 932	MTS						\$200,000	\$200,000
Route 955	MTS						\$200,000	\$200,000
Route 929	MTS						\$200,000	\$200,000
Route 967 & 968	MTS						\$192,428	\$192,428
Bus Stop Improvements	NCTD	\$482,492	\$246,602	\$536,328				\$1,265,422
SPRINTER Weekend Service	NCTD		\$156,375	\$156,375	\$156,375	\$107,106		\$576,231
SPRINTER Shuttle	NCTD						\$193,938	\$193,938
Valley Parkway	NCTD					\$42,484		\$42,484
El Norte Parkway	NCTD					\$87,243		\$87,243
Route 351 & 352	NCTD					\$216,139		\$216,139
Medical Jobs Shuttle	NCTD					\$151,215		\$151,215
Route 302	NCTD					\$96,709		\$96,709
Route 332	NCTD						\$126,574	\$126,574
Ridelink Bike Lockers	SANDAG			\$168,000				\$168,000
Total		\$1,260,947	\$1,327,266	\$1,593,659	\$1,509,808	\$1,780,529	\$1,613,512	\$9,085,721

► **FTA Section 5317 New Freedom Program**

The New Freedom program, authorized in SAFETEA-LU and continuing through the extensions, to support new public transportation services and public transportation alternatives beyond those required by the ADA of 1990. Examples of eligible projects include:

- Enhanced paratransit services beyond the minimum requirements of the ADA, for example, expanded service parameters beyond the three-fourths mile radius requirement or expanded hours of operation beyond those provided on the fixed-route services;
- Accessibility improvements to transit and intermodal stations not designated as key stations;
- Volunteer driver and aide programs; and
- The development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes, and to manage eligibility requirements and arrangements for customers among supporting programs.

SANDAG, as the designated recipient, allocates these funds on a competitive basis. MTS and NCTD may receive these grants, but nonprofit agencies also may compete and are eligible with SANDAG acting as the pass-through agency on their behalf. New Freedom program service is defined as any service or activity that was not operational on August 10, 2005, and did not have an identified funding source as of August 10, 2005; as evidenced by inclusion in the Transportation Improvement Plan (TIP) or the State Transportation Improvement Plan (STIP). In other words, if not for the New Freedom program, these projects would not have consideration for funding, and proposed service enhancements would not be available for individuals with disabilities.

The FTA further clarified the guidelines to include new and expanded fixed-route and demand-responsive service (provided those services are planned for and designed to meet the needs of individuals with disabilities) as eligible projects under the New Freedom program. The allocation of New Freedom funds through the Coordinated Plan competitive process are shown in Table 8.3 (FTA C 9040.1F). Funding will be available under the New Freedom program for Federal FY 2012.

► **Congestion Mitigation and Air Quality Program**

Administered by the Federal Highway Administration (FHWA), these funds can be used for transit capital projects and for certain operating expenses. The Congestion Mitigation and Air Quality (CMAQ) program provides funding for projects or services that contribute to the attainment or maintenance of federal air quality standards. Transit operators are not the only agencies that qualify for these grants and there can be stiff competition for these funds. Previous federal legislation allowed transit agencies to use CMAQ for operating purposes for the first three years of start-up service. SAFETEA-LU implementation guidelines, however, no longer allow this eligibility for New Starts-funded projects. Through 2008, MTS received a total of \$37 million for the Green Line Trolley (\$20.2 million for construction and \$16.8 million for operations) while NCTD has received \$20.9 million (\$4.9 million for construction and \$16 million for operations) for the SPRINTER light rail project. CMAQ funding was allocated to the SPRINTER in the following increments per fiscal year: FY 05/06, \$4.9 million; FY 07/08, \$6 million; FY 08/09, \$4 million; and FY 09/10, \$6 million. For the Trolley Green Line, CMAQ funding was allocated per year at the following levels: pre-1993, \$2.6 million; FY 92/93, \$1.8 million; FY 96/97, \$5.9 million; FY 04/05, \$11.2 million; FY 05/06, \$5.4 million; FY 06/07 \$5.6 million; and FY 07/08 \$4.2 million.

Table 8.3: New Freedom Programs Funded Through the Coordinated Plan

New Freedom		Project Awards						
Project	Agency	FY06	FY07	FY08	FY09	FY10	FY11	Total
Volunteer Driver Program	La Mesa	\$50,000	\$76,500	\$76,500	\$76,500	\$116,462	\$62,563	\$458,525
volunter escort	Penisula Shepherd						\$42,495	\$42,495
Contract Shuttle Service	San Ysidro Health Center						\$45,500	\$45,500
On the Move	San Marcos Senior Center						\$35,000	\$35,000
Volunter Driver Program	ITN San Diego						\$82,500	\$82,500
Mobility Management	FACT	\$107,007	\$557,760	\$491,195	\$287,521		\$160,000	\$1,603,483
Volunteer Driver Program	Oceanside	\$16,500						\$16,500
Senior Shuttle Program	Oceanside		\$23,300					\$23,300
Senior Activity Van	Senior Community Centers	\$51,451						\$51,451
Volunteer Driver Program	Jewish Family Services		\$41,811	\$47,097		\$89,855		\$178,763
Purchase lift equipped vehicle	All Congregations Together		\$64,000					\$64,000
Purchase lift equipped vehicle	SWCCD			\$40,000				\$40,000
Accessible Tourism Transportation Information Net	Accessible San Diego				\$132,960			\$132,960
MedAccessRide	FACT					\$260,000	\$112,707	\$372,707
MedRide	FACT					\$100,000		\$100,000
Vehicle Procurement	Yellow Cab					\$149,689		\$149,689
Door-Through-Door Transportation	Renewing Life					\$50,000	\$60,000	\$110,000
Mobility/Travel Training Program	NCTD	\$34,412	\$44,242	\$161,897	\$172,433	\$36,183		\$449,167
Bus Stop Accessibility	NCTD			\$70,400	\$76,378			\$146,778
Wounded Warrior	NCTD					\$189,707	\$200,000	\$389,707
Total		\$259,370	\$807,613	\$887,089	\$745,792	\$991,896	\$800,765	\$4,492,525

► Surface Transportation Program

The State Transportation Program (STP) is primarily designed to support road and highway projects. Despite this, under the flexible funding rules this program can be applied to transit, but there may be strong competition for these funds. SANDAG transfers both STP and CMAQ dollars to FTA in order to fund coastal rail projects.

8.2 State

State funding sources generally include motor fuel taxes, special fuel taxes, vehicle registration fees, and driver's license fees. State funding for transit projects are available through the STIP and more recently through the state Proposition 1A (Constitutional protections for transportation funding) and 1B (Transportation Bond) approved by the voters in 2006. In addition to the STIP, the State Transit Assistance (STA) is funded with 50 percent of the Public Transit Account revenues. Vehicle registration fee money also is available as a potential funding source according to Assembly Bill 2766 (AB 2766) (Sher, 1990). AB 2766 allows an Air Pollution Control District (APCD) to collect a \$6 motor vehicle registration fee surcharge, of which 40 percent of \$4 is diverted to implement projects that reduce mobile source emissions. The San Diego APCD recently increased this fee from \$2 to \$4 as allowed under AB 2766 (effective October 1, 2009). A future increase to \$6 could be implemented to provide additional support for public transit.

► State Transportation Improvement Program

The STIP includes both the Regional Improvement Program (RIP) and the Interregional Improvement Program (IIP). The RIP is allocated by County based on a formula, while the IIP is allocated based on a competitive process administered by the CTC. SANDAG proposes all projects under the RIP, while Caltrans is responsible for the IIP, and proposes those projects in consultation with SANDAG. STIP funds only may be used for capital expenses and not operating costs. Although major highway projects have been recipients of STIP funds, regional transit projects, such as Mid-Coast, Fare Technology, and other regional rail projects also have received funding. The projects and their funding levels that have received RIP and IIP funds are available at www.catc.ca.gov/programs/stip.htm.

► State Transit Assistance Program and ABX8 6 and ABX8 9

The State Transit Assistance (STA) program provides funding for allocation to local transit agencies to fund a portion of the operations and capital costs associated with local mass transportation programs. STA funding has changed over the past few years. In February 2009 the STA program was suspended through FY 2013 by the state. Previously, this program was the only ongoing source of state funding for day-to-day transit operations. However, in March 2010, Governor Schwarzenegger signed two bills in the eighth extraordinary session (ABX8 6 and ABX8 9) that apportioned \$400 million to local transit operators in FY 2009-10 and FY 2010-11. In FY 2011-12, the increased diesel sales tax will provide about \$348 million overall for local transit operations and state transit programs.

Assembly Bills ABX8 6 and ABX8 9 included the following major provisions:

- Repeal the sales tax on gasoline.

- ▶ Increase the excise tax on gasoline by 17.3 cents and add an annual index that will ensure that the new excise tax will keep pace with the revenues expected from the sales tax on gasoline.
- ▶ Increase the sales tax on diesel by 1.75 percent and allocate 75 percent to local transit agencies and 25 percent to state transit programs beginning in FY 2011-12. The legislation also reduced the excise tax on diesel from 18 cents to 13.6 cents to maintain revenue neutrality.
- ▶ Temporarily suspends STA efficiency criteria after January 1, 2010, through FY 2011-2012 to ensure that STA funds can be used for operations. (The criteria suspension is continued through FY 2015 per Senate Bill 565.)

8.3 Local

Local funds include monies from the regional sales tax for transportation (*TransNet*), the Transportation Development Act (TDA), transit fares, and other miscellaneous local funds such as advertising revenue and some related commercial activities such as concessions and real estate development. In addition, SANDAG conducted a comprehensive analysis of other potential regional and local revenue sources for transit operations, and included those findings in the “Transit Impediments Study” in 2009. These sources include the creation of assessment districts, levying fees, or taxes, which have been pursued by other regions or in other jurisdictions at the local level. Consideration of these possible solutions and alternatives generates a number of policy questions; the answers to some of which may require changes in state and/or federal law. These solutions offer ancillary funding streams or could potentially replace the need for a sales tax initiative. Additionally, Table 8.7 provides further details on these alternatives relative to potential funds generated, implementation authority, approval requirements, geographic applicability, and ease of administration.

The process to implement the local revenue mechanisms would be dictated to a large extent by the purpose and administration of the funds. As required by Proposition 218, any tax that is collected for a special purpose (e.g., for transportation infrastructure or transit services), as the proposals in this report would be, is defined as a “special tax” subject to the two-thirds voter supermajority approval. Funding mechanisms based on real property that are structured as “fees” to pay for specific improvements or services could be implemented as a simple local city or county regulation. If a portion of these fees exceeds the reasonable cost of these improvements or services, however, then the “fee” would actually be a “tax” subject to a two-thirds voter supermajority approval.

▶ *TransNet* and the Senior Transportation Mini-Grant Program

Since 1988 *TransNet*, the half-cent transactions and use tax that can be used for local transportation projects has been instrumental in expanding the transportation system, reducing traffic congestion, and advancing critical transit projects. In November 2004, 67 percent of the county’s voters approved a 40-year extension of *TransNet* (to 2048), which is expected to generate an additional \$14 billion (in 2008) for public transit, highway, and local street and road improvements.

The *TransNet* Ordinance prescribes funding for specific programs through the 40 years including 16.5 percent of the annual *TransNet* revenues dedicated for transit purposes. Of the revenues, 94.25 percent can be used for either capital or operating needs, while 2.5 percent is designated toward the ADA compliance, both are allocated by population to the two transit operators. Another 3.25 percent of the 16.5 percent is reserved for a competitive program to provide transportation services for seniors, the *TransNet* Senior Mini-Grant Program.

In addition, 8.1 percent of annual *TransNet* revenues are set aside for operating costs of specific new services developed with capital investment from the *TransNet* Major Corridors program.

Increases in the annual apportionments to the transit agencies are subject to limitations on cost increases in cost per revenue vehicle-hour and revenue vehicle-mile as compared to the Consumer Price Index for San Diego County, and verified through an annual fiscal audit. The 8.1 percent is limited to the new services specifically identified in the *TransNet* Expenditure Plan.

As stated by the *TransNet* Extension Ordinance, the *TransNet* Senior Mini-Grant program is intended to improve mobility for seniors throughout that county by funding innovative and cost-effective specialized transportation services for older adults including, but not limited to, shared group services, senior shuttles, volunteer driver programs, travel training, and the brokerage of multijurisdictional transportation services. The allocation of Senior Mini-Grant funds through the Coordinated Plan competitive process are shown in Table 8.4.

Table 8.4: Senior Mini-Grant Programs Funded Through the Coordinated Plan

Senior Mini-Grant		Project Awards					
Project	Agency	FY09	FY10	FY11	FY12	FY13	Total
ComLink Transportation	All Congregations Together	\$158,877	\$174,783	\$187,073			\$520,733
Senior Transportation Program	Alpha Project	\$195,806	\$195,806	\$195,806			\$587,418
Rides4Neighbors	City of La Mesa	\$80,000	\$80,000	\$80,000	\$116,462	\$173,838	\$530,300
Solutions for Seniors on the Go	City of Oceanside	\$105,456	\$234,131	\$299,328	\$198,300		\$837,215
Out & About Vista	City of Vista	\$76,464	\$0	\$0	\$95,912	\$99,025	\$271,401
Volunteer Driver Program	ElderHelp	\$117,421	\$111,110	\$117,406	\$98,936	\$97,280	\$542,153
Senior Ride Reimbursement	FACT	\$24,000	\$42,240	\$59,040			\$125,280
ITNRides	ITN San Diego	\$75,000	\$0	\$0			\$75,000
Rides & Smiles	Jewish Family Services	\$72,942	\$76,469	\$79,363	\$184,590	\$196,160	\$609,524
Mobility/Travel Training	NCTD	\$116,483	\$40,474	\$43,108		\$21,984	\$222,049
Volunteer Driver Program	Peninsula Shepherd Senior Center	\$42,144	\$43,877	\$45,680			\$131,701
Out & About Escondido	Redwood Elderlink	\$52,003	\$52,003	\$52,003	\$10,870	\$86,038	\$252,917
SenioRide	Travelers Aid Society	\$94,361	\$97,440	\$98,498	\$108,982	\$111,315	\$510,596
MedRide	FACT				\$200,000	\$200,000	\$400,000
MedAccessRide	FACT				\$9,000	\$56,000	\$65,000
Door-through-Door Transportation	Friends of ADHCC				\$103,974	\$120,054	\$224,028
Senior Nutrition Program	Redwood Elderlink	\$52,003	\$52,003	\$52,003		\$29,700	\$185,709
Total		\$1,262,960	\$1,200,336	\$1,309,308	\$1,127,026	\$1,191,394	\$6,091,024

► Transportation Development Act

The Mills-Alquist-Deddeh Act (SB 325) was enacted by the California Legislature to improve existing public transportation services and encourage regional transportation coordination. Known as the Transportation Development Act (TDA) of 1971, this law provides funding to be allocated to transit and nontransit-related purposes that comply with regional transportation plans. The TDA provides two funding sources including the STA, described previously, and the Local Transportation Fund (LTF), which is derived from a quarter cent of the general sales tax collected statewide. The State Board of Equalization, based on sales tax collected in each county, returns the general sales tax revenues to each county's LTF.

TDA comprises the largest source of subsidy for the San Diego region's transit operators and for nonmotorized transportation projects. TDA funds may be used for a wide variety of transportation programs, including operations, planning and program activities, pedestrian and bicycle facilities, community transit services, public transportation, and bus and rail projects. Providing certain conditions are met, counties with a population under 500,000 also may use the LTF for local streets and roads, construction, and maintenance.

TDA comes from a quarter of a percent of state sales tax assessed in the region. SANDAG, as the Regional Transportation Planning Agency, is responsible to release the apportionment of TDA funds each year in conformance with state statute. The transit operators and other member agencies submit their annual TDA claims based on the annual apportionment and in compliance with SANDAG Board Policy No. 027: TDA Administration Policy. Pursuant to state statute, the County of San Diego Auditor and Controller office has the responsibility for providing the TDA apportionment for the upcoming fiscal year. The County Auditor develops the apportionment in consultation with SANDAG staff. SANDAG is required to notify prospective claimants of the apportionment by March 1 of each year.

The legislative priorities established by state law include certain categories for which TDA funds are taken "off the top." These include the allocation to SANDAG for various planning, programming, and administrative-related expenses, funding of bicycle and pedestrian facilities, and support of community transit services (see below discussion). In addition, the County Auditor receives an allocation based on estimates of its costs to administer the TDA program. The remaining apportionment, along with prior year carryover funds, is available to be claimed by the two transit operators.

Pursuant to state statute, support of community transit services comprise five percent of the annual TDA apportionment (TDA Section 4.5), which include services for those such as persons with disabilities who cannot otherwise use conventional transit services. Eligible applicants are cities, counties, public transit operators, and the Consolidated Transportation Services Agency (CTSA). According to SANDAG Board Policy No. 027, 2 percent of the total available under TDA Section 4.5 is set aside to support the CTSA, currently designated as Facilitating Access to Coordinated Transportation (FACT). In recent history, this amount has been approximately \$100,000 per year. The remaining funds in this section (3 %) are divided between MTS and the NCTD service areas based on the ratio of the total population in each area to support their respective ADA paratransit services. A summary of the FY 2013 TDA claims is shown in Table 8.6.

► Fares

SANDAG is responsible for the setting of fares on the transit services in the San Diego region through the Comprehensive Fare Ordinance. Since 2007, SANDAG periodically has increased fares upon request by the transit agencies. In addition, SANDAG developed a Regional Comprehensive Fare Study, with the original goal of achieving a single, simplified, equitable structure for both operators. SANDAG has worked to implement this simplified structure with the most recent Fare Ordinance amendment passed and adopted in December 2011.

It also is recognized that there are clear limitations on raising fares, and there are market forces that need to be carefully considered. It should be emphasized that fare increases are not easily accomplished, and that modification to fare policy will not by itself change the dynamics of the situation facing public transit in this region.

► Tolls

The existing and future managed lane programs on regional freeways including Interstate 15 (I-15), I-805 and I-5 are designed to allow surplus revenues from the roadway to be used to support transit services. To date, MTS (the transit operator on this corridor) has received over \$10 million in surplus revenue generated by the existing I-15 toll segment. The annual amount made available for transit does vary based on the tolls generated by the managed lanes and related costs. The SANDAG Board and has committed to providing \$500,000 per year for I-15 transit services and the SANDAG Transportation Committee has recommended that the FY 2011 amount be increased to \$1 million.

► Air Pollution Control District Quality Improvement Fund

The County of San Diego's Air Pollution Control District (APCD) funding for the Sorrento Valley COASTER Connection services ended effective June of 2008; however, the APCD continues to provide funding for juror transit passes.

► Caltrans Mitigation Funds

In special cases where highway construction creates additional congestion, some special funding has been available to transit operators to pay for additional transit services. Temporary mitigation funding may be available for future highway projects.

Table 8.6: Transportation Development Act FY 2013 Claims Summary

Attachment 1

Transportation Development Act Revenues
Revision to FY 2012, Apportionment for FY 2013 and Estimates for FY 2014 through FY 2018

	FY 2012	FY 2013	FY 2014 (\$000s)		FY 2015 (\$000s)		FY 2016 (\$000s)		FY 2017 (\$000s)	
	Revised	Apportionment	Mid-range	Low	Mid-range	Low	Mid-range	Low	Mid-range	Low
Total Apportionment ^{1,2}	\$112,098,742	\$117,143,185	\$123,387	\$115,887	\$130,297	\$122,797	\$137,072	\$129,572	\$143,651	\$136,151
Less County Auditor Expenses (PUC 99233.1)	(45,000)	(46,000)	(47)	(47)	(48)	(48)	(49)	(49)	(50)	(50)
Less SANDAG Administration (PUC 99233.1)*	(377,917)	(536,673)	(416)	(391)	(439)	(414)	(612)	(586)	(502)	(479)
Less 3% Planning Funds (PUC 99233.2)	(3,350,275)	(3,496,815)	(3,688)	(3,464)	(3,894)	(3,670)	(4,092)	(3,868)	(4,293)	(4,069)
Less 2% Bicycle/Pedestrian Funds (PUC 99233.3)	(2,166,511)	(2,261,274)	(2,385)	(2,240)	(2,518)	(2,373)	(2,646)	(2,501)	(2,776)	(2,631)
Less 5% Community Transit Service (PUC 99233.7)	(5,310,202)	(5,542,421)	(5,845)	(5,490)	(6,172)	(5,817)	(6,486)	(6,131)	(6,804)	(6,449)
Subtotal	\$100,848,837	\$105,260,002	\$111,006	\$104,255	\$117,226	\$110,475	\$123,187	\$116,437	\$129,226	\$122,473
Total Available for MTS	71,551,202	74,680,877	78,758	73,969	83,170	78,380	87,399	82,611	91,685	86,894
Less Regional Planning/Capital Projects ³	(1,497,729)	(618,168)	(451)	(451)	(398)	(398)	(405)	(405)	(413)	(413)
Less Transferred Functions ⁴	(2,091,766)	(2,183,260)	(2,302)	(2,162)	(2,431)	(2,291)	(2,555)	(2,415)	(2,680)	(2,540)
Total Community Transit Service	3,692,182	3,853,644	4,064	3,817	4,292	4,045	4,510	4,263	4,731	4,484
Total Available to Claim	\$71,653,889	\$75,733,093	\$80,069	\$75,173	\$84,632	\$79,736	\$88,949	\$84,053	\$93,322	\$88,424
Total Available for NCTD	29,297,635	30,579,125	32,249	30,288	34,055	32,094	35,787	33,826	37,542	35,580
Less Regional Planning/Capital Projects ³	0	0	TBD							
Less Transferred Functions ⁴	(490,735)	(512,200)	(540)	(507)	(570)	(538)	(599)	(567)	(629)	(596)
Total Community Transit Service	1,511,815	1,577,928	1,664	1,563	1,757	1,656	1,847	1,745	1,937	1,836
Total Available to Claim	\$30,318,715	\$31,644,853	\$33,372	\$31,343	\$35,242	\$33,212	\$37,034	\$35,005	\$38,850	\$36,820
Total Available for SANDAG:										
Regional Planning/Capital Projects	1,497,729	618,168	451	451	398	398	405	405	413	413
Transferred Functions	2,582,501	2,695,460	2,843	2,670	3,002	2,829	3,155	2,982	3,309	3,136
SANDAG Expenses	377,917	536,673	416	391	439	414	612	586	502	479
3% Planning Funds	3,350,275	3,496,815	3,688	3,464	3,894	3,670	4,092	3,868	4,293	4,069
Prior Year Carryover	3,468,517	3,468,517								
Total Available to Claim	\$11,276,939	\$10,815,633	\$7,397	\$6,975	\$7,733	\$7,311	\$8,264	\$7,841	\$8,518	\$8,098
Total Community Transit Service (CTSA)	\$106,204	\$110,848	\$117	\$110	\$123	\$116	\$130	\$123	\$136	\$129
Prior Year Carryover	\$5,011	\$0								
Total Available to Claim	\$111,215	\$110,848	\$117	\$110	\$123	\$116	\$130	\$123	\$136	\$129

¹The County Auditor provided the apportionment for FY 2013 and has also revised the FY 2012 apportionment based on the higher than anticipated FY 2011 actual receipts. The projected estimates for FY 2014 to FY 2017 are based on the growth rate in retail sales as forecasted by SANDAG and excludes interest and prior year excess funds. The low range is based on the 95% confidence interval of (-)\$7.5M per year.

²Apportionment distribution is based on the population estimates published by the California Department of Finance (DOF) estimates as of January 2010. The DOF has not yet released the January 2011 estimates and following past practice the most current available population is used for this distribution - 70.9% () for MTS and 29.1% (936,731) for NCTD.

³Represents the local match for federally funded regional planning projects and transit capital development projects identified in the FY 2013 CIP. For MTS, of the \$618,168, capital share is \$435,800 while the planning share is \$182,368. For NCTD, the local match for the capital projects to be implemented by SANDAG will come from prior year TDA funds. The FY 2014 to 2017 capital projects are estimates as provided by MTS and will be included as part of the FY 2013 Capital Improvement Program scheduled for Transportation Committee/Board action at their March meetings. As a result, this amount is subject to change.

*Based on Addendums No. 3 and No. 4 to the Master Memorandum of Understanding between MTS, NCTD, and SANDAG. For NCTD, 26.09% of its amount is transferred back to NCTD to be used for TDA-eligible purposes.

*Note: The SANDAG Administration cost in FY 2013 and FY 2016 rises disproportionately due to costs associated with the triennial performance audit. All other annual increases in SANDAG administrative share are consistent with growth in the TDA.

► **Other Potential Regional and Local Revenue Sources Explored in the SANDAG “Transit Impediments Study”**

Other solutions to finding new sources of money also were evaluated based on their potential application as regional funding measures and were included in the Transit Impediments Study (SANDAG, 2009). These include the creation of assessment districts, levying fees, or taxes, which have been pursued by other regions or in other jurisdictions at the local level. Consideration of these possible solutions and alternatives generates a number of policy questions; the answers to some of which may require changes in state and/or federal law. These solutions offer ancillary funding streams or could potentially replace the need for a sales tax initiative. Additionally, Table 8.7 provides further details on these alternatives relative to potential funds generated, implementation authority, approval requirements, geographic applicability, and ease of administration.

VEHICLE LICENSE FEES

Another funding source is increased revenues through the increase in annual vehicle registration fees. AB 2766 (Sher, 1990) allows an Air Pollution Control District (APCD) to collect a \$6 motor vehicle registration fee surcharge, of which 40 percent of \$4 is diverted to implement projects that reduce mobile source emissions. The San Diego APCD recently increased this fee from \$2 to \$4 as allowed under AB 2766 (effective October 1, 2009). These funds typically are used for projects and programs that reduce emissions, including transit services (the Sorrento Valley COASTER Connection services were funded, in part, by the APCD through FY 2008). With the increase to \$4, transit projects may be eligible to compete for these funds.

TRANSIT CENTER USER FEES

Parking structures and other facilities located at premium, rapid bus, and rail stations often are at or near capacity. A potential revenue source would be to establish user fees at these facilities. While user fees can help manage the use where parking supply is constrained relative to demand, care must be exercised to develop a fee structure that does not discourage use of the bus or rail service to the point that it significantly reduces ridership. Based on a daily flat parking fee of \$3 levied on weekday nontransit passholders (assuming current parking occupancy), this type of fee could generate in the range of \$1 million per year (existing number of park-and-ride spaces) to \$2 million per year (future parking spaces included in the 2030 Regional Transportation Plan). SANDAG and the transit agencies currently have the authority to implement user fees. This would require a new program structure to administer since no fees are currently collected.

PARCEL TAXES

Property taxes on land and building values are generally the principal source of revenue for local governments. Portions of local property taxes are authorized widely for use by special districts and authorities, including transit agencies and school districts. Unlike real estate transfer taxes (discussed below), property taxes can provide an annual versus one-time funding source for public transit. Traditionally, support for public transportation has been derived from sources other than property tax to avoid competition with other basic public services, such as health, education, police, and fire protection. With existing sources of transit funding being

reduced or eliminated, parcel tax assessments for transit could provide a valuable tool to reduce the gap between operating costs and revenues. Based on a range of \$50 to \$100 assessed on each parcel, this type of tax could generate between \$35 and \$70 million for transit operations. Local jurisdictions have the authority to implement a parcel tax, but it would require two-thirds voter supermajority approval. The existing programmatic structure in place could be used to collect such a tax should it be levied in the County.

TRANSIT ORIENTED DEVELOPMENT (TOD)/JOINT DEVELOPMENT

Transit Oriented Development (TOD) and joint development around transit stations can benefit transit systems by increasing the number of residents and/or employees with walk access to rail and bus services, along with potential revenues through sale/lease of transit station rights-of-way/air rights. This strategy has been used successfully at several rail stations in the San Diego region, and is being factored into the development of future rail and bus rapid transit lines outlined in the 2050 Regional Transportation Plan. Another related option for funding sources is the sale or lease of property or air rights. As the land values continue to rise, especially along the coast, and as transportation facilities and routes are developed along coastal corridors, the sale or lease of air rights will be an attractive income opportunity for transit operators and agencies. While the cost of construction may be considerably higher, the high land value secures reasonable economic feasibility.

PAYROLL TAXES

A transit payroll tax involves a tax imposed directly on an employee or employer based on gross wages regardless of whether the employee uses transit or not. In Portland, Oregon a payroll tax is levied by the Tri-County Metropolitan Transportation District (TriMet) and the Lane County Mass Transit District, while a similar payroll tax is levied by the New York Metropolitan Transit Authority (MTA). Unlike a commuter benefits ordinance which has the advantage of encouraging public transit ridership, a payroll tax has the potential to cover unsubsidized gaps in operating costs and revenues. Existing legislation may allow cities in San Diego County to institute a type of tax known as an "occupation" tax, which is a tax on employees rather than employers (as is the case under the Portland TriMet and New York MTA payroll taxes). Where similar payroll tax percentages were applied countywide under the "occupation" tax using the 0.34 percent TriMet and 0.66 percent New York MTA examples, this type of funding source could generate in the range of \$175 to \$340 million for transit operations. Such a tax would require 2/3 voter approval to implement.

RENTAL CAR FEES

Rental car fees, more commonly found in rental agreements that originate at airports, are levied in jurisdictions across the United States. While these fees are sometimes used to pay for facilities directly associated with the airport (parking structures or new terminals, for example) some jurisdictions levy these fees to pay for facilities that are not associated with airport improvements, such as stadium expansions or renovations. An option would be to establish rental car fees that provide funding for transit system operations as mitigation for their contribution to congestion on the local street and highway network. These rental car fees could be extended to rental car agreements originating at locations other than airports. SANDAG does not have the authority to impose rental car fees, and so new legislation would be required

to allow SANDAG or any local jurisdiction to impose such a fee for transit operations. If legislative changes were implemented and rental car fees were imposed at a rate of 1 percent to 5 percent (based on a recent New York MTA rental car fee of 5 percent), between \$2 million and \$10 million could be generated for transit operations.

BENEFIT ASSESSMENT DISTRICTS

Benefit assessment districts allow a public agency to construct and maintain improvements, such as traffic signals, parks, and others. Project costs are assessed within the boundaries of the designated benefit area of the county or city. Benefit assessment districts have several advantages: they tie financing of specific projects to beneficiaries; they allow different levels of infrastructure and services to vary with different demands for these public goods; and they allow an area that wants better infrastructure the ability to fund desired improvements itself. There are certain disadvantages, however, including potential fragmentation of infrastructure and services varying between those areas that want to pay for the improvements and those that do not. Local jurisdictions have the authority to create benefit assessment districts. A nexus study and local agency approval would be required and would require a new program structure to administer.

PARKING ASSESSMENT DISTRICTS

Parking assessment districts would allow the region to assess fees on certain parking spaces within defined areas. A surcharge or fee on parking spaces through parking assessment districts in congested areas, such as downtown San Diego or other major employment centers, would help raise additional revenue and reduce traffic congestion. Local jurisdictions have the authority to create parking assessment districts, but a nexus study and local agency approval is required. Additionally, any new assessment district would require a new program structure to administer.

DEVELOPMENT IMPACT FEES AND EXACTIONS

Development impact fees (DIF) are fees collected by local agencies to grant development permits that are tied to certain infrastructure improvements. The DIF also could be a vehicle to fund regional transportation mitigation projects. An analysis of these options must include recognition that DIFs may be opposed by the development community as additional fees would increase their cost of doing business. Public agencies also may find it hard to bond against projected DIF revenue, since the revenues materialize only once the development is implemented. DIFs currently can only be applied to transit capital expenses and not operating expenses. Local jurisdictions have the authority under the Mitigation Fee Act to impose a fee for transit capital, but new legislation would be required to allow the funding to be used for transit operations.

COMMUNITY FACILITIES DISTRICTS

Community facilities districts (CFDs) are allowed under the provisions of California Government Code Section 53311 (known as the “Mello-Roos Community Facilities Act of 1982). Districts formed under this act are more commonly referred to as “Mello-Roos” districts, community facilities districts, or “CFDs.” The act allows public agencies and cities to form a CFD to fund capital infrastructure and services. It is not clear though that statutes would currently allow the use of CFDs to fund transit operations.

TAX INCREMENT FINANCING

Tax increment financing (TIF), in contrast to DIFs, is made up of two components. The first is base revenues, which are the property taxes collected based on existing assessed property values. The second component is the tax increment, which represents the new revenues in excess of the base revenues that are generated based on the higher assessed value of the new development. TIFs can only be imposed by cities and the County, but may be opposed by local agencies as they limit the amount of revenues that are collected in an area positively impacted by the construction of infrastructure, in this case transportation improvements. A mitigating action in the creation of TIFs is that the local agencies could keep the tax increment upon payment of the transportation infrastructure financing.

TIF can only be used to fund capital purchases. Current law allows redevelopment agencies formed by cities and counties to use this type of funding for transit capital projects in highly populated areas. New state legislation would be required to amend the community redevelopment law to authorize funding for transit operations. New state legislation also would be required to amend the community redevelopment law to authorize funding for transit capital in areas with a population under the current thresholds (4 million in the County or 500,000 in a city).

REAL ESTATE TRANSFER TAXES

Real estate transfer taxes (RETT), also referred as deed recordation taxes, are imposed on the sale or transfer of real property. The fees usually are based on or measured by the consideration paid for or the fair market value of the real estate. Thirty-five states already use RETTs to generate revenue. Some of the uses in other jurisdictions in California and Oregon for revenues derived from RETTs include: affordable housing programs, open space, parkland acquisition and maintenance, and transportation infrastructure. In California, RETTs may be imposed only at the local level by cities and counties. The level of revenues generated depends on the rate, though in the San Diego region the high level of real estate valuations also would influence the amount of revenues. California law allows up to a maximum of \$0.55 per \$500 of the value of the property being conveyed. There may be some opposition to the imposition of these RETTs precisely because property owner tax bills may be considered high due to these higher property values.

Currently, the maximum tax is being assessed at \$0.55 per \$500, which is split evenly with \$0.55 per \$1,000 for each city and \$0.55 per \$1,000 for the County. Any additional tax increase for noncharter cities would require new state legislation. Additionally, a charter city can forgo its right to half of this tax (known as a “conforming tax”) and subsequently can levy a “nonconforming tax” in its place. There does not appear to be a limit on the amount a charter

city can charge for a so-called nonconforming tax. Current examples of this practice vary from \$1.10 per \$1,000 in Riverside and to as high as \$15 per \$1,000 in Berkeley and Oakland.

ADVERTISING

Advertising can provide a source of income with minimal associated overhead costs. Revenues from advertising typically flow directly or indirectly to the operating agencies from single- or multiyear advertising contracts. Advertising revenue opportunities can include both electronic and print formats, with print ads opportunities on both buses and at transit stations. Revenue from advertising is typically modest, from 0.1 percent to about 3.0 percent of operating revenue. A targeted advertising strategy focused on station naming rights for new transit services, such as the planned bus rapid transit/rapid bus stations for example, could present the opportunity to help subsidize operations or maintenance costs at these stations. Any new transit advertising strategy would need to be consistent the SANDAG Board Policy No. 034 on Advertising.

Table 8.7: Summary of Potential Regional and Local Revenue Sources for Transit Operations

Potential Measure	Assumptions	Potential Annual Funds Generated (\$M)	Who Has the Authority at the Local Level?	What are the Requirements to Get It Implemented?	Where Can It Be Applied?	Existing Structure in Place or Requires New Structure to Administer
Additional Transportation Sales Tax ⁽¹⁾	1/4 to 1/2 Cent Sales Tax	\$117 - \$234	SANDAG	2/3 Voter-Approval	Regional	Existing Structure
Vehicle Registration Fees	\$2/Vehicle	\$5	County (acting as APCD)	Currently implemented; funds distributed via a competitive selection process	Regional	Existing Structure
Transit Center User Fees	\$3/Parking Space Fee (Range Based on Existing and Planned Spaces at Park and Ride lots)	\$1 - \$2	SANDAG/ Transit Agencies	SANDAG/ Transit Agency Policy	Regional	Requires New Structure
Parcel Taxes ⁽²⁾	\$50 to \$100 Per Parcel	\$35 - \$70	Local Jurisdictions	2/3 Voter-Approval	Local/ Regional	Existing Structure
Payroll Taxes ⁽³⁾	0.34% to 0.66% of all County Wages and Salaries	\$175 - \$340	Local Jurisdictions	2/3 Voter-Approval	Local/ Regional	Requires New Structure ⁽⁴⁾
Rental Car Fees ⁽⁵⁾	1% to 5% Fee on Gross Rental Car Revenue	\$2 - \$10	None Currently	New State Legislation	Local/ Regional	Requires New Structure
Benefit Assessment Districts	TBD ⁽⁶⁾		Local Jurisdictions	Nexus Study and Local Agency Approval	Local/ Regional	Requires New Structure
Parking Assessment Districts			Local Jurisdictions	Nexus Study and Local Agency Approval	Local/ Regional	Requires New Structure
Development Impact Fees and Exactions ⁽⁷⁾			None Currently	New State Legislation	Local/ Regional	Requires New Structure
Community Facilities Districts ⁽⁸⁾			None Currently	New State Legislation	Local	Requires New Structure
Tax Increment Finance ⁽⁹⁾			None Currently	New State Legislation	Local	Requires New Structure
Real Estate Transfer Taxes ⁽¹⁰⁾			Local Jurisdictions (Other than Charter Cities)	New State Legislation	Local/ Regional	Existing Structure
			Charter Cities ⁽¹¹⁾	2/3 Voter-Approval	Local	Requires New Structure

- (1) Pursuant to Rev. & Tax Code § 72511.1 the cities and the County are capped at 2% aggregate for all local sales taxes. With the current 8.25% state tax rate, there is a maximum available tax rate for the cities and the County of 10.25%. All of the cities and the County have the capacity to add at least another 1/2% before reaching the maximum. The only area of the state that has exceeded this 2% cap is Los Angeles. This was accomplished via SB 314 (2003), which gave LA County the ability to exclude its transportation sales tax from the 2% limit imposed by § 72511.1.
- (2) Based on the Alameda-Contra Costa Transit parcel tax rate of \$96 per parcel (recent 2008 measure doubled existing \$48 parcel tax for transit services).
- (3) Wage and salary information from the California Employment Development Department (EDD). Tax range based on the New York MTA rate of 0.34% and Portland's Tri-Met rate of 0.66%. However, Portland does not have a transit sales tax measure.
- (4) Existing legislation may allow cities to institute a type of tax known as an "occupation" tax, which is a tax on employees rather than employers.
- (5) Rental car fees are currently being charged on gross rental car revenues under the California Tourism Marketing Act. These dollars are spent at the state level by the Office of Tourism. Sample rate taken from the New York MTA recent rental car fee at 5% of gross revenues.
- (6) These measures would require more research given the wide range of implementation strategies within each jurisdiction; previous estimates prepared for the 2030 RTP are out-of-date given the significant economic changes that have occurred since then.
- (7) Development Impact Fees could only be applied to transit capital expenses and not operating expenses. Local jurisdictions have the authority under the Mitigation Fee Act to impose a fee for transit capital, but new legislation would be required to allow the funding to be used for transit operations.
- (8) Any city can establish a Community Facilities District (CFD) under the Mello-Roos Law. However, it appears that statutes do not currently allow use of CFDs to fund transit operations.
- (9) Tax Increment Financing can only be used to fund capital purchases. Current law allows redevelopment agencies formed by cities and counties to use this type of funding for transit capital projects in highly populated areas with the finding of blight. New state legislation would be required to amend the Community Redevelopment Law to authorize funding for transit operations. New state legislation would also be required to amend the Community Redevelopment Law to authorize funding for transit capital in areas with a population under the current thresholds (4 million in the County or 500,000 in a city).
- (10) Currently the maximum tax is being assessed (\$0.55 per \$500, which is split evenly with \$0.55 per \$1,000 for each city and \$.55 per \$1,000 for the County). Any additional tax increase for non-charter cities would require new state legislation.
- (11) A charter city can forgo its right to half of this tax (known as a "conforming tax"), and subsequently can levy a "nonconforming tax" in its place. There does not appear to be a limit on the amount a charter city can charge for a so-called nonconforming tax. Current examples of this practice vary and are as high as \$15 per \$1,000 in Berkeley and Oakland to \$1.10 per \$1,000 in Riverside.

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- (6) These measures would require more research given the wide range of implementation strategies within each jurisdiction; previous estimates prepared for the 2030 RTP are out-of-date given the significant economic changes that have occurred since then.
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- (9) Tax Increment Financing can only be used to fund capital purchases. Current law allows redevelopment agencies formed by cities and counties to use this type of funding for transit capital projects in highly populated areas with the finding of blight. New state legislation would be required to amend the Community Redevelopment Law to authorize funding for transit operations. New state legislation would also be required to amend the Community Redevelopment Law to authorize funding for transit capital in areas with a population under the current thresholds (4 million in the County or 500,000 in a city).
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The Coordinated Plan



Chapter 9



Implementation

CHAPTER 9: IMPLEMENTATION

Implementation of transportation services based on this plan will largely be the responsibility of the transit operators, health and human service agencies, the Consolidated Transportation Services Agency (CTSA), and other public agencies (e.g., cities, tribes). The San Diego Association of Governments (SANDAG) will serve as a conduit for federal, state, and local funding of existing and future services recommended in this plan. SANDAG also develops the long-range transit plan through the 2050 Regional Transportation Plan (2050 RTP), develops operating plans for regional services identified in the *TransNet* Extension Ordinance, funds services, and implements projects identified in the *TransNet* Extension Ordinance. SANDAG also plays a role in developing and promoting some alternative transportation modes (e.g., icommutesd.com, buspools, vanpools) and enhancing transportation information (e.g., 511).

SANDAG staff will monitor new and existing services and report back to the SANDAG Transportation Committee on progress toward achieving the goals, objectives, guidelines, and targets established in this document.

9.1 Program Management Plan and Competitive Process

In its role as the conduit for federal, state, and local funding of existing and future services recommended in the plan, SANDAG prepares and updates the Program Management Plan (PMP) to manage the Job Access and Reverse Commute (JARC), New Freedom, and the *TransNet* Senior Mini-Grant programs (existing grantees and future sources of funding where available). The PMP was originally developed to ensure that all SANDAG policies and federal and local statutes and regulations applicable to these programs are fulfilled. The PMP has been periodically updated to ensure that the maximum possible benefit is enjoyed by the community through a fair and equitable distribution of the available funds. This includes comprehensive community outreach, public involvement, and stakeholder input through coordination with advisory committees (e.g., Social Services Transportation Advisory Council and the Independent Taxpayer Oversight Committee). The complete updated PMP is available at www.sandag.org/CoordinatedPlan. The PMP includes the following two key components:

- ▶ Description of the competitive process procedures to select JARC, New Freedom, and Senior Mini-Grant projects.
- ▶ Overview of the monitoring and reporting requirements of the projects selected and funded through the competitive process.

The PMP was updated in Fiscal Year (FY) 2009, FY 2010, and FY 2012 to enhance both of the above components. Amendments to the competitive process included enhancing the connection between the prioritized strategies from the Coordinated Plan and projects funded through the grant programs. Additionally, the PMP includes a general update of the project selection criteria and scoring processes for the JARC, New Freedom, and Senior Mini-Grant programs. The monitoring and reporting requirements were enhanced in FY 2009 to include a requirement for recipients to

provide quarterly project reports to enable SANDAG to determine if the grantees are: performing to expectations; are on schedule; on budget and within funding limitations; able to meet local match requirements from eligible funds; encountering any nonfunding challenges or difficulties; meeting performance goals; and taking corrective action as necessary.

In addition, SANDAG does not participate in the competitive process for rural JARC and New Freedom applications. The rural competitive process is run by the California Department of Transportation (Caltrans) on a statewide basis; however, all rural projects selected by Caltrans in the rural areas of the county must be derived from the Coordinated Plan prepared by SANDAG.

SANDAG also participates in the annual competitive process to award funds under Federal Transit Administration Section 5310 for capital projects for transportation for seniors and persons with disabilities. The actual process is managed by Caltrans on a statewide basis and is not included in the PMP; however, SANDAG provides input in the evaluation of local applications.

9.2 FY 2013 Regional Service Implementation Plan

The current economic crisis forced the transit agencies to make tough decisions on service cuts over the past several years. However, funding appears to be stabilizing and there is some capacity to look toward the addition of routes (or enhancements to current routes) over the next several years. SANDAG develops the Regional Service Implementation Plan (RSIP) to ensure that any transit service changes are consistent with regional objectives. Each year the Metropolitan Transit System (MTS) and the North County Transit District (NCTD) are required to submit a Service Implementation Plan (SIP) to SANDAG in advance of the budget approval process. The SIPs list the operational changes each transit operator implemented or plans to implement in order to balance proposed fiscal year budgets. Minus budget shortfalls, a discussion is included in these plans regarding the service changes and their impacts on existing service gaps and deficiencies based on the goals and objectives from the Coordinated Plan. This year, both MTS and NCTD provided updated SIPs. Since NCTD had conducted a comprehensive Mobility Plan, the SIP is essentially an Executive Summary of the Mobility Plan with detailed descriptions of route changes to be implemented over the course of the plan. This Mobility Plan will serve as their Comprehensive Operations Analysis (similar to what MTS prepared several years ago). Both SIPs are included in Appendix F.

Additionally, it is recognized that the CTSA for San Diego also plays a role in regional service implementation since the CTSA's mission is to provide access and mobility in the region by coordinating existing resources and developing alternative models of transportation. The inclusion of the CTSA in implementation discussions is appropriate given that transit service reductions have created gaps in service coverage that have, in turn, created challenges for the provision of specialized transportation in those areas.

► RSIP Development

After receiving the transit agency SIPs, SANDAG is responsible for developing the RSIP to evaluate operational changes. Additional services can include those designed by the operators (MTS or NCTD) and/or by SANDAG. Accordingly, the plan includes the following sections:

- Service changes (reductions, restructuring, enhancements, or additions); and
- Identification of future services and needs to address regional priorities.

► Service Changes

MTS service planning for FY 2012 was constrained by flat operating revenue while NCTD was on the cusp of starting to implement its Mobility Plan. By mid-FY 2012, positive trends in ridership and subsidy revenue development pointed to a more favorable condition for FY 2013 that would enable some additional service expansions. NCTD also contracted out all of its bus service and was developing a more efficient operations plan with the Mobility Plan implementation. Service adjustments for both agencies included modifying service to improve the network, addressing capacity deficiencies, and responding to customer complaints.

Much of the NCTD Mobility Plan is based on reshaping the fixed route BREEZE network as it ties into the two NCTD rail lines (SPRINTER and COASTER). The changes also take into account land use changes project for the NCTD service area and include the following key design initiatives:

- Further integrate BREEZE, SPRINTER, and COASTER services into a cohesive multi-modal network offering direct routes and shorter travel times;
- Use SPRINTER and COASTER rail stations as terminal points for BREEZE bus routes to provide network connectivity, reduce transfer wait times, and facilitate “line-of-sight” transfers between buses and trains;
- Simplify the route network by straightening route alignments within topographic and street constraints, minimizing overlapping segments and improving travel speeds particularly on corridor routes by running primarily on arterial and major collector streets with fewer deviations.
- Improve service frequencies on top performing routes within fiscal limitations.
- Selectively reduce fixed route system coverage in areas that lack sufficient population density, street network and pedestrian facilities, or transit travel demand needed to support minimum performance thresholds.

The NCTD Mobility Plan also recognizes that some lower density areas with limited street networks cannot support a consistent level of fixed route BREEZE service, but warrant a lower capacity service option. Where fixed route services would be curtailed or discontinued, the plan proposes non-traditional small bus services that feature flexibly routed and scheduled characteristics better suited to operating conditions similar to the FLEX demand response routes that NCTD implemented in fiscal year 2012.

While the RSIP ideally focuses on the evaluation of new services and programs for regional consistency and need, the converse also is true. The RSIP must ensure that service reductions and restructuring are consistent with regional goals and objectives. Table 9-1 includes the service changes undertaken in FY 2012, along with any public hearings and civil rights (Title VI) assessments associated with the adjustments. Additionally, the table includes a determination of regional significance.

Table 9.1A: MTS Service Changes (FY 2012)

Route	Service Proposal Descriptions	Date of Service Change	Public Hearing Date ¹	Title VI Analysis Date ¹	Passenger/Revenue Hour (FY11) ²	Regionally Significant
MTS						
7	<ul style="list-style-type: none"> ▪ Weekday afternoon extra tripper service resumes for school year. ▪ Saturday and Sunday frequency increased to 12 minutes. Weekday afternoon school tripper service suspended for summer. 	9/4/11	No	No	59.3	No
		6/10/12	No	No	62.8	No
8	<ul style="list-style-type: none"> ▪ All-day service frequency reduced to a non-summer schedule, 20 minutes Monday-Saturday and 30 minutes Sunday. ▪ All-day service frequency increased to 15 minutes all days for summer. 	9/4/11	No	No	44.3	No
		6/10/12	No	No	44.3	No
9	<ul style="list-style-type: none"> ▪ All-day service frequency reduced to a non-summer schedule, 20 minutes Monday-Saturday and 30 minutes Sunday. ▪ All-day service frequency increased to 15 minutes all days for summer. 	9/4/11	No	No	38.5	No
		6/10/12	No	No	38.7	No
10	<ul style="list-style-type: none"> ▪ Sunday westbound trip added leaving City Heights Transit Plaza at 7:29 am 	9/4/11	No	No	66.5	No
20	<ul style="list-style-type: none"> ▪ Sunday afternoon southbound trips from Mira Mesa added. 	6/10/12	No	No	43.1	Yes ³
27	<ul style="list-style-type: none"> ▪ Sunday summer only service ends; Saturday service returned to 90 minute frequency. ▪ Saturday frequency increased to 60 minutes and Sunday 60 minute service added. 	9/4/11	No	No	34.4	No
		6/10/12	No	No		
30	<ul style="list-style-type: none"> ▪ Weekend and holiday seasonal schedule adjustments. ▪ Weekend service frequency between Old Town and Pacific Beach increased to 15 minutes. 	9/4/11	No	No	38.6	No
		6/10/12	No	No		

Route	Service Proposal Descriptions	Date of Service Change	Public Hearing Date ¹	Title VI Analysis Date ¹	Passenger/Revenue Hour (FY11) ²	Regionally Significant
44	<ul style="list-style-type: none"> ▪ Weekdays: Schedule adjusted and service added to improve on-time performance. On weekday mornings, six additional trips between Old Town and Mesa College provide needed additional capacity. On weekday afternoons, schedule adjustments. ▪ Weekdays: Extra weekday morning trips to Mesa College discontinued for summer. 	1/29/12	No	No	56.2	No
115	<ul style="list-style-type: none"> ▪ Sunday service implemented with 75 minute frequency from approximately 7:30 am to 6:30 pm 	9/4/11	No	No	NA	No
204	<ul style="list-style-type: none"> ▪ All Day: SuperLoop service expanded to new East Loop as Route 204. 	6/10/12	No	No	NA	No
810	<ul style="list-style-type: none"> ▪ Weekday morning southbound trip and two afternoon trips added. 	9/4/11	No	No	34.7	Yes ³
	<ul style="list-style-type: none"> ▪ Weekday round trip added to accommodate ridership increases and other minor schedule changes. 	6/10/12	No	No		
854	<ul style="list-style-type: none"> ▪ All-Day weekday Route 854x express service between Grossmont Transit Center and Grossmont College resumes for academic year. 	9/4/11	No	No	61.6	No
	<ul style="list-style-type: none"> ▪ All-Day: One round trip added to accommodate ridership increases and other minor schedule changes. 	6/10/12	No	No		
874/875	<ul style="list-style-type: none"> ▪ All-Day: minor schedule adjustments 	9/4/11	No	No	37.9/42.5	No
880	<ul style="list-style-type: none"> ▪ Weekday: minor schedule adjustments 	9/4/11	No	No	17.5	Yes ³
	<ul style="list-style-type: none"> ▪ Weekday: minor morning schedule adjustments 	6/10/12				
891/892	<ul style="list-style-type: none"> ▪ All-Day: Fare zone boundary changed so that Ramona originating and destinating passengers pay only a one-zone fare. Passengers traveling through Ramona pay a two-zone fare. 	1/29/12	No	No	1.9/2.5	Yes ³
921	<ul style="list-style-type: none"> ▪ Weekday schedule adjusted. 	1/29/12	No	No	38.8	No
955	<ul style="list-style-type: none"> ▪ All-Day: Minor schedule adjustments. 	9/4/11	No	No	56.9	No

1 Public hearings or Title VI analysis is not conducted for minor service changes (a change to less than 25% of the service).

2 Passengers per revenue-hour are based on performance along the entire route. This statistic may not reflect the route segment or time of day actually impacted by the adjustments. In cases where "weekend" service is shown, Saturday statistics are used and in cases where "all-day" service is shown, weekday statistics are used.

3 All revised services and service adjustments of regional significance were found to be consistent with the goals and objectives of the Coordinated Plan.

Table 9.1B: NCTD Service Changes (FY 2012)

NCTD Route	Mobility Plan Service Change Description	Date of Service Change	Public Hearing Date	Title VI Analysis Date	Passengers/revenue hour (2011 weekday)	Regionally Significant (Y/N)
101	During weekday peak commute periods, continue to operate to University Towne Center. During all other service periods, terminate route at V.A. Medical Center, with passengers transferring to MTS connecting services.	8/28/11	4/21/2011	3/2011	22.1	Y
302	On weekdays and Saturdays when Route 325 serves Vista Way west of El Camino Real, streamline route to use Marron Rd. and El Camino Real between Plaza Camino Real Transit Center and Vista Way/El Camino Real. On Sundays, when there is no 325 service, continue to operate existing Route 302 alignment. Improve weekday service frequency to 15 minutes during peak hour and every 20 minutes during peak shoulders and midday.	3/11/12	4/21/2011	3/2011	30.1	N
303	To correct overcrowded trips, improve Saturday, Sunday, and holiday headways to 20 minutes between 8 a.m. and 4 p.m.	6/12/2011	4/21/2011	3/2011	30.6	N
304	Streamline the existing 404 route alignment to operate via Olivenhain, El Camino Real, Santa Fe, and Vulcan. Interline the 304 and 404 at Encinitas Station to create a circulation loop in Encinitas. Designate new service as Route 304. Maintain a limited number of peak trips serving Encinitas Blvd. between El Camino Real and Rancho Santa Fe and Rancho Santa Fe between Encinitas Blvd. and Olivenhain Rd. Operate every 30 minutes during weekday peak and every 60 minutes during weekday midday and evening. Saturday hourly service to be added in future as budget permits.	8/28/11	4/21/2011	3/2011	17.9	N
306	Extend route north on Main to Mission Rd. to improve transit access (August 2011). Improve p.m. peak-period service to every 30 minutes to match a.m. service when budget permits.	8/28/11	4/21/2011	3/2011	19.0	N
308	Reduce weekday peak headways to every 60 minutes.	8/28/11	4/21/2011	3/2011	13.9	Y
309	Modify route to serve Plaza Camino Real using Marron Rd. as a point deviation from El Camino Real, and not serve Vista Way and Jefferson. Modify route to use Mission Ave., Frazee Rd., and College Blvd. between El Camino Real/Mission and Town Center North. Maintain a limited number of weekday midday trips to serve Douglas Dr., Vandegrift Blvd., and College Blvd.	3/11/12	4/21/2011	3/2011	16.3	N
311	**NEW ROUTE** Weekday peak-period route operating between Town Center North and Rancho Del Oro SPRINTER Station. Serves College Blvd., Vandegrift Blvd., Douglas Dr., Pala Rd., Los Arbolitos, Fireside Rd., Mission Ave., Rancho Del Oro Dr., Via Rancho Rd., Ivey Ranch Rd., Mesa Drive, Ocean Ranch, Corporate Center, and Oceanside Blvd. Operates approximately every 60 minutes, with supplemental school trippers.	3/11/12	4/21/2011	3/2011	N/A	N
313	Existing route maintained between Oceanside Transit Center and Mesa Dr./El Camino Real. From El Camino Real east, Rt. 313 will serve Mesa Drive, Rancho Del Oro Dr., SR-76, and Town Center Dr. Operates every 45 minutes during peak periods and every 90 minutes during midday.	3/11/12	4/21/2011	3/2011	22.0	N
315	Route extended south to College Blvd. SPRINTER Station (Oceanside Blvd./Avenida Del Oro). Weekday peak service span expanded to two hours in each peak. Selected peak trips to operate using Old Grove Rd. and Frazee Rd. to partially replace discontinued Route 333.	8/28/11	4/21/2011	3/2011	13.8	N
316	**NEW ROUTE** New weekday, one-way loop route from Rancho Del Oro SPRINTER Station, serving Oceanside Blvd., Corporate Center Dr., Avenida De La Plata, Avenida Del Oro, Old Grove Rd., Mesa Dr., Rancho Del Oro Dr., Seagate, and Rancho Del Oro Dr. Selected trips to serve El Corazon Senior Center. Operates every 30 minutes.	8/28/11	4/21/2011	3/2011	N/A	N

NCTD Route	Mobility Plan Service Change Description	Date of Service Change	Public Hearing Date	Title VI Analysis Date	Passengers/revenue hour (2011 weekday)	Regionally Significant (Y/N)
317	Route discontinued to reduce service duplication. Some segments replaced by Routes 315 and 316.	8/28/11	4/21/2011	3/2011	24.4	N
318	Route extended east from El Camino Real SPRINTER Station via Oceanside Blvd. to Bobier, and then extended to Vista Transit Center following Rt. 334/335 alignment.	3/11/12	4/21/2011	3/2011	19.6	N
319	Route discontinued due to low productivity. Service to El Corazon Senior Center replaced by Route 316.	8/28/11	4/21/2011	3/2011	10.1	N
321	Route discontinued due to low productivity, with partial replacement by new extended Route 445. Midday service coverage along portions of alignment provided by new FLEX 373 Southwest Carlsbad.	8/28/11	4/21/2011	3/2011	19.4	N
323	**NEW ROUTE** Weekday only route operating between College Blvd. SPRINTER Station and Quarry Creek Shopping Center. Midday trips operate to Plaza Camino Real. A.m. and p.m. school trippers between College Blvd. SPRINTER and Chestnut-Monroe. Route serves College Blvd., Olive Ave., Emerald Dr., Skyhaven, Lake Blvd., College Blvd., Carlsbad Village Dr., Avenida de Anita, and Marron Rd. to Monroe St. Hourly service during peak hours to Quarry Creek, with midday service to Plaza Camino Real every 120 minutes.	8/28/11	4/21/2011	3/2011	N/A	N
325	Route truncated at north end to College Blvd. SPRINTER Station (Route 315 extended to serve College between station and Town Center North Shopping Center). Route realigned between Thunder/Vista way and Plaza Camino Real — uses Vista Way, College, Barnard, MiraCosta College, Rancho Del Oro, Vista Way, Jefferson and Marron. Operates a trip pattern that uses Carlsbad Village Dr. between Monroe and Harding, in addition to the existing Tamarack routing. Operates Route 325 every 30 minutes on weekdays, and every 60 minutes on Saturday.	8/28/11	4/21/2011	3/2011	15.3	N
331	Route discontinued due to low productivity and incorporated into revised Route 332 service.	8/28/11	4/21/2011	3/2011	3.0	N
332	Route extended from Sycamore-Shadowridge to Buena Creek SPRINTER station. Route deviates into Vista Court Complex on weekdays during business hours. Selected trips serve Kaiser medical offices or Kaplan College. Operates every 20 minutes in peak periods and every 30 minutes in midday.	8/28/11	4/21/2011	3/2011	23.9	N
333	Route discontinued due to low productivity, with portions of the route replaced by Routes 302, 315, 318, 332, and 334/335.	3/11/12	4/21/2011	3/2011	14.4	N
334/335	Segment from Bobier/Melrose to Vista Transit Center appended to extend Route 318. New 334 realigned into a smaller loop serving Olive Ave., Melrose Dr., North, Los Angeles, Townsite Dr., E. Vista Way, Vale Terrace, Vale Terrace Place, Alta Vista, Coventry, Beaumont, Eucalyptus, S. Santa Fe, and Vista Village Dr. Operate Route 334 every 30 to 40 minutes all day (clockwise loop), and supplement during peak period with reverse direction loop (Route 335), also operating every 40 minutes.	3/11/12	4/21/2011	3/2011	18.7	N
340	For improved efficiency, this shuttle service is incorporated into the revised Route 347.	3/11/12	4/21/2011	3/2011	Not available	N

CHAPTER 9: IMPLEMENTATION

NCTD Route	Mobility Plan Service Change Description	Date of Service Change	Public Hearing Date	Title VI Analysis Date	Passengers/revenue hour (2011 weekday)	Regionally Significant (Y/N)
347	Realign Route 347 so that it operates between Palomar College Transit center and the CSUSM SPRINTER Station, via Craven Circle. Modify routing to serve Las Posas and San Marcos via Vera Cruz. Incorporate resources from Route 340 and improve headways to every 30 minutes on weekdays. Saturday hourly service to be added in future as budget permits. New Route 353 will cover portions of the 347 alignment between Nordahl Rd./Center Dr. and Escondido Transit Center. New San Marcos-Escondido FLEX service will serve current Route 347 alignment between CSUSM and Nordahl/Center.	3/11/12	4/21/2011	3/2011	13.2	N
350	Route converted to Rapid Bus with Transit Signal Priority (TSP), improved bus stops, and real-time schedule information at selected stops.	6/12/11	4/21/2011	3/2011	30.8	Y
351/352	Shorten existing circulation loop to Midway Dr. for most trips (selected trips during school commute hours will extend to Glenridge/Citrus). New Route 355/357 will provide replacement service on Valley Pkwy. east of Midway and on El Norte between Washington and Valley Pkwy. Improve frequency to every 15 minutes during weekday peak, every 20 minute during weekday midday, and every 30 minutes on weekday evenings, and on weekends and holidays.	3/11/12	4/21/2011	3/2011	26.6	N
353	**NEW ROUTE** Operates between Nordahl Marketplace (Nordahl Rd/Center Dr.) and Palomar Medical Center via Citracado Pkwy. and Escondido Transit Center. Serves Nordahl Rd., Citracado Pkwy., Andreason, Enterprise, Harmony Grove, Hale, West 9 th , and 2 nd Ave/Valley Pkwy. Operates every 30 minutes on weekdays and every 60 minutes on Saturday.	3/11/12	4/21/2011	3/2011	N/A	N
354	No changes	N/A	N/A	N/A	24.4	N
355/357	**NEW ROUTE** Operates bidirectional loop serving Broadway, El Norte Pkwy, and Valley Pkwy. Operates every 30 minutes during weekday peak and midday and every 60 minutes at all other times. Seven-day service (NOTE: Service inaugurated with weekday peak service only in March 2012)	3/11/12	4/21/2011	3/2011	N/A	N
356	No changes	N/A	N/A	N/A	28.8	N
358/359	No changes	N/A	N/A	N/A	15.0	N
386	Route discontinue due to low productivity and replaced with FLEX Ramona Services (370-371-372)	8/28/11	4/21/2011	3/2011	11.2	N
388/389	No changes	N/A	N/A	N/A	18.4	Y
395	No changes	N/A	N/A	N/A	N/A	N/A
444	Realign to provide shorter, faster route from Poinsettia COASTER Station to Carlsbad businesses on Aston, Rutherford, Priestly, and Faraday.	8/28/11	4/21/2011	3/2011	21.5	N
445	Streamline to provide more direct route to Carlsbad office parks off Palomar Airport Rd. Operate closed door from COASTER station to Palomar Airport Rd. /College Blvd. Extend selected trips east of Loker to Palomar College to offset cancellation of Route 321 and maintain transit link to High Tech High North County.	8/28/11	4/21/2011	3/2011	21.5	N
446	**NEW ROUTE** New route between Poinsettia COASTER Station and Armada Dr., partly replacing Rt. 321 service to Carlsbad Premium Outlets and Legoland and Rt. 444 service to Armada Dr.	8/28/11	4/21/2011	3/2011	N/A	N
FLEX 370	**NEW DEMAND-RESPONSE SERVICE** Local general public-demand in Ramona, operating one day each week, from 6 a.m. to 6 p.m.	8/28/11	4/21/2011	3/2011	N/A	N

NCTD Route	Mobility Plan Service Change Description	Date of Service Change	Public Hearing Date	Title VI Analysis Date	Passengers/revenue hour (2011 weekday)	Regionally Significant (Y/N)
FLEX 371	**NEW DEMAND-RESPONSE SERVICE** Peak-period, fixed- route/fixed schedule service between Ramona and Escondido Transit Center.	8/28/11	4/21/2011	3/2011	N/A	N
FLEX 372	**NEW DEMAND-RESPONSE SERVICE** Midday, reservation-based demand-response service between Ramona and Escondido Transit Center. Serves ¾ mile zone around Route 371 alignment. One weekday round trip, fixed departure times — must reserve in advance.	8/28/11	4/21/2011	3/2011	N/A	N
FLEX 373	**NEW DEMAND-RESPONSE SERVICE** Local general public, demand-response service in S.W. Carlsbad, operating weekdays, during COASTER service hours. Serves area bounded by the coast, Cannon Rd., El Camino Real, Aviara Pkwy., Poinsettia Ln., I-5, and Bataquitos lagoon.	8/28/11	4/21/2011	3/2011	N/A	N
FLEX 374	**NEW DEMAND-RESPONSE SERVICE** Local general public, demand-response service in southern Encinitas/western Solana Beach. Operates weekdays between 6 a.m. and 6 p.m., serving area bounded by the coast, Leucadia Blvd., Olivenhain Rd., Rancho Santa Fe Rd., Manchester Ave., I-5, and Via De La Valle.	2012	4/21/2011	3/2011	N/A	N

► Regional Service Changes

Beyond necessary service cuts or restructuring activities, the RSIP also includes a list of service enhancements or additions planned for the five-year Coordinated Plan implementation period (FY 2012-2016).

SANDAG is currently developing several key transit projects which will be implemented over the next five years. Detailed descriptions of these projects are included below. The SANDAG transit projects and services are included in the Program of Projects Expenditure Plan in the *TransNet* sales tax extension approved by the San Diego County voters in November 2004. The budget worksheets for these projects (as included in the SANDAG FY 2011 Program Budget) are included in Appendix B.

► SUPERLOOP

The SuperLoop is a new, two-way circular transit system that serves the north University City area of San Diego. The initial service began in June 2009 connecting University Towne Centre (UTC) to University of California, San Diego (UCSD) and the surrounding residential communities. Features of the SuperLoop include ten-minute peak headways between vehicles and uniquely branded vehicles with low-emission technology. The second phase of the project includes priority traffic treatments, such as signal prioritization, queue jumper lanes, and enhanced stations with “next bus” electronic messaging and station platforms custom built for easy boarding. In September 2010 the route was extended to serve La Jolla Colony south of Nobel Drive on a trial basis to assess potential ridership. The next phase also extends the route to the area east of UTC which will begin in June 2012.

► MID-CITY RAPID BUS

The Mid-City Rapid Bus Project is a ten-mile rapid bus line from San Diego State University (SDSU) to downtown San Diego along El Cajon and Park Boulevards. The line will provide North Park, City Heights, and College area residents, students, and visitors with a high-quality service. Major activity centers that will be served include the downtown Trolley stations, Balboa Park, San Diego Zoo, the Mid-City communities, and SDSU.

The project will provide faster travel times and increased reliability by using a segment of transit-only lanes, curb pop-outs at stations, traffic signal priority and improved synchronization, and enhanced stations. Stations will include ticket vending machines, upgraded shelters, passenger information signs, raised platforms to ease boarding, landscaping, and upgraded paving. Construction is scheduled to begin by the end of 2012.

► INTERSTATE 15 (I-15) EXPRESS LANES/BUS RAPID TRANSIT PROJECT

The 20-mile I-15 Express Lanes was completed in 2012 from State Route 163 (SR 163) to State Route 78 (SR 78). The I-15 Express Lanes consist of four lanes with a moveable barrier for maximum flexibility (similar to the moveable barriers on the San Diego-Coronado Bridge), multiple interim access points to/from the general purpose highway lanes, and direct access ramps (DARs) from five bus rapid transit (BRT) stations for high-frequency BRT service, car and vanpoolers, and FasTrak users. The BRT stations and DARs are located at the Escondido Transit

Center, Del Lago (southern Escondido), Rancho Bernardo, and Sabre Springs, with the BRT station and DAR in Mira Mesa to open in 2014. Bus Lanes are proposed to be completed by 2015 between Interstate 8 (I-8) and Interstate 805 (I-805) in the Mid-City area with transit stations at El Cajon Blvd and University Ave.

BRT service in the I-15 corridor will also begin in 2014 providing additional routes, higher frequencies, reduced travel times, and new vehicles.

▶ SOUTH BAY BRT PROJECT

The South Bay BRT project will provide high-speed transit connections between downtown San Diego and the Otay Mesa Border Crossing along the future I-805 Managed Lanes and a dedicated transitway through eastern Chula Vista. Use of the managed lanes and transitway will provide travel priority for the service allowing it to bypass traffic congestion.



This new BRT will provide access to regional employment centers in downtown San Diego, the Otay Mesa Business Park, and the future Eastern Urban Center, as well as serving residential communities in Chula Vista and National City.

In the long term, the BRT will operate on high-occupancy vehicle (HOV) lanes on State Route 94 (SR 94) and along the I-805 Managed Lanes, with DARs connecting freeway stations/park-and-ride lots. As the route exits I-805 at Palomar Street in Chula Vista, it will travel on a dedicated right-of-way, with stations in the Otay Ranch transit-oriented villages of Heritage, Lomas Verdes, and Santa Venetia. From there, the BRT will continue southbound with stations at the new Otay Ranch Town Center, the Eastern Urban Center, and a future university station. The BRT will then use SR 125 to tie into the Otay Mesa Border crossing.

The next phase of work will include environmental analyses and preliminary engineering. This project will receive funding from the *TransNet* Extension Ordinance that was approved by voters in November 2004. Additional federal funding may be sought for the project. The project is scheduled for completion in 2014.

▶ MID-COAST CORRIDOR TRANSIT PROJECT

The Mid-Coast Corridor Transit Project proposes to extend light rail transit (LRT) service from the Old Town Transit Center (OTTC) to the University City community of San Diego. The extension will link major destinations, including Westfield UTC shopping mall and UCSD with OTTC and downtown San Diego.

The locally preferred alternative for the project, adopted by the SANDAG Board of Directors in July 2010, is an 11-mile extension to the existing San Diego Trolley system. It begins just north of the OTTC and travels in existing railroad right-of-way and alongside Interstate 5 (I-5) to serve

UCSD and UTC. Between OTTC and State Route 52 (SR 52), stations are proposed at Tecolote Road, Clairemont Drive, and Balboa Avenue. Within the University City area, stations are proposed at Nobel Drive, UCSD west campus, UCSD east campus, Executive Drive, and the UTC transit center. SANDAG also is studying the feasibility of an additional station at the V.A. Medical Center.

► Identification of Future Services and Needs

The RSIP also includes a discussion of the plan to develop new services in the future when funding returns. At such a time, proposals for new services will be prioritized and recommended for funding consideration based on the performance measures included in Chapter 3. The need for those services is generally identified by the individual transit operators in their service implementation plans, as well as by SANDAG through the Coordinated Plan development process and identification of gaps in transit service (Chapter 6). Table 10.2A summarizes the needs identified by NCTD and MTS. Table 10.2B highlights some of the major transit service needs in the RTP urbanized area (based on Figure 3.1 from Chapter 3) based on the understanding that transit performs better in areas where land use is supportive of transit services. Additionally, it is envisioned that urban service needs can maximize the use of limited investment dollars during lean financial times to produce the largest number of transit trips.

Table 9.2A: Operator-Identified Service Area Needs

	Route	Day	Description	Urban Zone
MTS Identified Service Area Needs				
PHASE I: JUNE 2012	7	Saturday	Increase 15 min. frequency to 12 min (8 a.m.-6 p.m.)	Yes
	7	Sunday	Increase 15 min. frequency to 12 min (11 a.m.-6 p.m.)	Yes
	20	Weekday	Add trips from Mira Mesa to Downtown during the pm peak	Yes
	30	Saturday	Add 15 min. overlay between Old Town & Pacific Beach	Yes
	30	Sunday	Add 15 min. overlay between Old Town & Pacific Beach	Yes
	810	Weekday	Add one round trip	Yes
PHASE II: SEPTEMBER 2012	1	Sunday	Add selected trips	Yes
	6	Saturday	Increase 30 min. frequency to 15 min.	Yes
	10	Sunday	Add selected trips	Yes
	11	Sunday	Reconnect Sunday service via 1st Avenue with an hourly frequency	Yes
	13	Sunday	Add selected trips	Yes
	15	Weekday	Add selected AM peak trips; increase 15 min. pm peak frequency to 12 min.	Yes
	20	Weekday	Extend 30 min. frequency midday service to Del Lago Transit Station	Yes
	35	Weekday	Increase 30 min. frequency to 15 min. during the pm peak	Yes
	35	Sunday	Extend span and extend 30 min. frequency three hours earlier	Yes
	41	Sunday	Extend the span of the 30 min. frequency service	Yes
	44	Weekday	Add 7.5 min. overlay between Old Town & Mesa College, 3pm-6pm	Yes
	44	Sunday	Increase 60 min. frequency to 30 min.	Yes
	150	Weekday	Add extra peak hour service	Yes
	703	Sunday	Add service to make a consistent 60 min. frequency	Yes
	705	Saturday	Increase 45 min. frequency to 30 min.	Yes
	712	Saturday	Increase 60 min. frequency to 30 min.	Yes
	712	Sunday	Restore Sunday service with hourly frequency, between Palomar & Sharp	Yes
815	Sunday	Increase 60 min. frequency to 30 min., 10 a.m.-5 p.m.; extend service to 8pm	Yes	
848	Sunday	Extend span of service to 8pm	Yes	

	Route	Day	Description	Urban Zone
MTS Identified Service Area Needs (cont'd)				
PHASE II: SEPTEMBER 2012 (CONT'D)	864	Sunday	Extend span of service to 8pm	No
	874/875	Sunday	Extend span of service to 8pm	Yes
	905	Weekday	Add selected peak hour trips	Yes
	929	Weekday	Increase 15 min. pm peak frequency to 12 min.	Yes
	BLUE	Weekday	Increase am span of 7.5 min. frequency	Yes
	GREEN	Saturday	Increase am span of 15 min. frequency west of Qualcomm Stadium	Yes
	GREEN	Sunday	Increase 30 min. frequency to 15 min. west of Qualcomm Stadium	Yes
	ORANGE	Saturday	Increase am span of 15 min. frequency	Yes
	ORANGE	Sunday	Increase 30 min. frequency to 15 min. for most of the day	Yes
PHASE IIIA: JANUARY 2013	4	Weekday	Increase 30 min. peak frequency to 15. min west of Euclid	Yes
	5	Saturday	Increase 30 min. frequency to 20 min.	Yes
	13	Saturday	Increase 30 min. frequency to 20 min.	Yes
	15	Sunday	Increase 30 min. frequency to 20 min.	Yes
	20	Saturday	Extend short-line trips from Fashion Valley/Kearny Mesa to Mira Mesa	Yes
	30	Weekday	Increase 15 min. peak frequency between Old Town & the V.A. Med Ctr.	Yes
	41	Weekday	Increase northbound 15 min. frequency to 10-12 min. (6:30 am-10am)	Yes
	905	Saturday	Increase 60 min. frequency to 30 min.	Yes
	955	Weekday	Increase 15 min. pm peak frequency to 10-12 min.	Yes
955	Saturday	Increase 30 min. frequency to 20 min. (8am-6pm)	Yes	
PHASE IIIB: JANUARY 2013 OR LATER	2	Weekday	Increase 11-12 min peak frequency to 10 min.	Yes
	6	Sunday	Increase 30 min. frequency to 15 min., and add one pm trip	Yes
	10	Weekday	Increase 15 min. peak frequency to 12 min.	Yes
	856	Sunday	Restore Sunday service with an hourly frequency.	Yes
	901	Sunday	Increase 60 min. frequency to 30 min.	Yes
	904	Sunday	Restore Sunday service with an hourly frequency.	Yes
	905	Weekday	Add hourly midday local service for an all-day 30 min. frequency	Yes
	905	Sunday	Restore Sunday service with an hourly frequency	Yes
	933	Weekday	Increase 12 min. frequency to 6 min. (1:30-2:30pm)	Yes
	992	Saturday	Increase 30 min. frequency to 15 min.	Yes
992	Sunday	Increase 30 min. frequency to 15 min.	Yes	

Route	Day	Description	Urban Zone
NCTD Identified Service Area Needs			
COASTER	All Days	Implement Convention Center Platform	Yes
COASTER	All Days	Implement Camp Pendleton Platform	Yes
SPRINTER	All Days	Increase SPRINTER headways from 30 min to 20 min	Yes

Table 9.2B: Identified Regional Needs

City	Site	Service Need	Urban Zone
Del Mar, Carmel Valley, and Sorrento Mesa	Residential, commercial and employment areas	Limited service between MTS and NCTD service boundary with no service in Carmel Valley	No
Oceanside to University Town Center	El Camino Real and I-5 Corridor	Service between Oceanside and UTC	Yes
Riverside County	I-15	Service to Downtown San Diego, Sorrento Valley, Mission Valley, Kearny Mesa and University City (via Mira Mesa) identified as major employment hubs	No
San Diego (32nd Street/Harbor)	San Diego (San Ysidro/Otay)	Heavy concentrations of trip origins along I-5 and I-805 corridors to the border.	Yes
San Diego (Downtown)	Downtown San Diego	Lack of Downtown circulator	Yes
San Diego (Mission Valley)	San Diego (San Ysidro, Otay Mesa)	Heavy concentrations of trip origins along the boarder to Mission Valley via I-805	Yes
San Diego (Sorrento Mesa)	Otay Mesa	Service to Sorrento Mesa via BRT	Yes
San Diego (Sorrento Valley)	El Cajon and Santee	Concentrations of trip origins with SR 52 as possible connection to Sorrento Valley via Kearny Mesa and UTC	Yes
San Diego (University City)	San Diego (Carmel Valley, Rancho Peñasquitos, Mira Mesa) and Santee	Heavy concentrations of trip origins in the identified San Diego and Santee communities with trip destinations in University City	Yes

► CTSA Service Implementation

In 2006 SANDAG designated Facilitating Access to Coordinated Transportation (FACT), a nonprofit organization, to be the CTSA for San Diego County. CTSA's were established by the State legislature in 1979 to foster coordinated transportation services. The CTSA designation confers a quasi-governmental entity status on FACT. SANDAG selected FACT as the CTSA through a competitive bid process.

FACT's mission is to "assist seniors, persons with disabilities, and social service recipients in San Diego County to meet their transportation needs." In December 2009, FACT developed a Business Plan to articulate its role as the mobility manager for the transportation disadvantaged populations of San Diego County. The Business Plan envisioned FACT as a one stop transportation call center, technical advisor for regional coordination and potentially a brokerage for transportation services that would identify and meet gaps in existing transportations services.

The Business Plan is updated annually. The most recent update occurred in January 2012 (2013-18 Business Plan Update). The plan classified FACT services into Current, Proposed Short-Term Services and Proposed Long-Term Services, some of which are listed below:

Current:

- Manage transportation provider database and FACT Web site
- Telephone referrals for transportation services
- Outreach and assistance to transportation service providers
- Donate and auction retired vehicles in the community
- *TransNet* funded RideFACT dial-a-ride services in Ramona through October 2010-October 2011 and in Escondido, Rancho Bernardo, and Poway beginning January 2012
- Complete integration of FACT and STRIDE websites

Proposed Short-Term Services (1-2 years):

- Implement Software based brokerage operations
- Implement MedRIDE, a senior dial-a-ride to access medical services in urban and suburban San Diego County
- Implement MedAccessRIDE, a dial-a-ride service for North County to serve persons with disabilities
- Enhanced customer assistance and increased outreach to riders and transportation providers
- Present 7 mobility related workshops
- Implement WorkRIDE program for work related trips for low income individuals - subject to availability of funds
- Purchase 9 vehicles funded by 5310 and New Freedom programs to provide trips under MedRIDE and MedAccessRIDE programs

Proposed Long-Term Services (3-5 years):

- Coordination with medical services providers
- Medicaid transportation coordination
- Expansion of MedRIDE and MedAccessRIDE services

In January 2012, FACT implemented a pilot brokered transportation system in June 2012 to unify all transportation services in the County from the rider's perspective. Eligible clients may call for referrals to any transportation in the County and if a suitable option were not available, they would be offered a trip by FACT.

In April 2012 FACT collaborated with SANDAG and 2-1-1 San Diego on an application for Federal Transit Administration funds to provide mobility services to military personnel, veterans and their families. Upon grant execution, FACT will amend the business plan to include projects funded by the new grant.

9.3 Looking Ahead

SANDAG and the transit agencies have continued to evaluate the need for enhanced services based on the knowledge of changing development, demographics, fuel prices, or gaps in service from current service cuts. Additionally, the CTSA also is developing ways to serve other passengers in the region in areas outside of the transit coverage area.

MTS developed a comprehensive operations analysis (COA) in 2005, with the full implementation period occurring through FY 2007. MTS will continue to monitor operations consistent with MTS Policy 42, which was amended in 2007 to incorporate the vision for MTS services developed in the COA; services that are productive, customer-focused, competitive with other travel options, integrated, and sustainable. Additionally, MTS conducted a weekend service analysis in 2009 and utilized the results to adjust weekend services in 2010. Additionally, MTS has identified route improvements to be phased in over the next year as shown previously in Table 9.2A.



NCTD is currently in the final phases of implementing its Mobility Plan that restructures existing services to develop a financially sustainable route network in North County. Much of the focus of the Mobility Plan is on reshaping the fixed route bus network around the foundation of the two rail lines. The service changes included in the plan reflect prevailing and projected future conditions with respect to the land use and development in the NCTD service area. Additionally, NCTD is looking toward the development of COASTER platforms at Camp Pendleton and at the Convention Center in downtown San Diego as well as improving SPRINTER headways from 30 minutes to 20 minutes. These service development needs are included in Table 9.2A.

SANDAG most recently completed a significant update to its RTP that now extends the long-range planning period out 38 years to the year 2050. Projects identified in the 2050 RTP where they

correspond to the short-range five-year time period of this Plan. Projects that are included in the near term phasing of the transit component, of that SANDAG has the ability to significantly fund the planning, construction, and operations of regional transit services through the extension of the *TransNet* half-cent sales tax measure. This measure will fund the SuperLoop, Mid-City Rapid Bus, I-15 Managed Lanes BRT, and South Bay BRT projects discussed in the “Service Enhancements or Additions” section.

9.4 Post Implementation Monitoring

The Coordinated Plan includes the evaluation of transportation system performance using the performance measures and indicators developed in the original plan. In the future, the document will add more quantitative analysis on a regional basis as more data becomes available on public transit and supplementary transportation providers. New technologies are also being implemented in transit, including automatic vehicle location devices, the Compass Card, and automatic passenger counting devices. These new technologies will increase the amount of data available when future plans are being produced. The timeliness of the data and the accuracy should also be improved. Future plans will address the data priorities and recommend where efforts should be made to improve the flow of information.

Currently, very little data is available on transportation coordination or the human service transportation system. As SANDAG becomes more involved in funding these services, it is expected that more information will become available on the performance of these systems. The performance data will be fed back into the planning process, and priorities may be adjusted.

9.5 Unforeseen Events

This plan has been prepared based on the best information available and the current guidance and priorities from senior levels of government. Unforeseen events, such as escalations in fuel prices, changes to funding formulae, or annual appropriations could impact local transportation operations. All publicly funded transportation operations in San Diego are operating in a financially constrained environment and have very little room to maneuver. The transit agency budget cycles were more constrained over the past fiscal year with Transportation Development Act and *TransNet* funding estimates significantly revised downward due to less than anticipated sales tax revenue. It was hoped that public transit would receive additional state “spillover” funds that result when higher gasoline prices and related sales taxes increase at a faster rate than other taxable items. Unfortunately, the state legislature diverted these public transportation funds to the state’s general fund leaving transit agencies with major funding deficits in their operating budgets. In FY 2010 some of these funds began to return to transit in the form of the gas tax “swaps” embedded in Assembly Bills 6 and 9 (March 2010).

In addition, the success of the future projects or plans, such as the NCTD Mobility Plan, the I-15 and South Bay BRT, and Mid-City Rapid Bus projects in this plan period have the potential to significantly change the baseline levels of transit ridership and performance in San Diego. The combined impact of these changes may cause significant changes to this plan over next five years as these projects are implemented.