The Coordinated Plan

2008-2012

One Region - One Network - One Plan

Final – October 2008

SANDAG

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

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Executive Summary

Staggering gas prices, concerns of global climate change, and the aging of our population are all critical issues facing the San Diego region. Solutions to these concerns will determine how we grow as a region and how truly sustainable we become. The Coordinated Plan has been developed to respond to these important topics from a regional transit planning and social service transportation perspective, which have been combined into this short-range plan.

The Coordinated Plan takes its cue from the long-range (25-year) plan or "Regional Transportation Plan" (RTP) which was recently updated in 2007. Taking a much larger view, the RTP is one component of the broader Regional Comprehensive Plan (RCP), which provides the foundation for integrating land uses, transportation systems, infrastructure needs, and public investment strategies.

The RTP guides development of the Coordinated Plan through the provision of its goals and policies relating to regional transportation planning. The Coordinated Plan takes those goals and policies and refines them so that a workable implementation plan is possible; a plan that focuses on improving and enhancing the existing public transit and human service transportation system. This is accomplished through the determination and clear articulation of the various transportation needs that exist in the region. This determination, in turn, leads to the development of strategies and projects aimed at fulfilling those needs. The process is also enhanced by the evaluation of transportation system performance data. Evaluating performance helps to determine where additional funding should go or what types of new programs can be provided to help fill existing transportation gaps.

Requirements, Implementation, and Available Funding

While the Coordinated Plan is guided by the RTP, it also is a requirement of the federal government. 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. At the same time, SANDAG policy requires that a Regional Short-Range Transit Plan (RSRTP) be updated every year.

The Coordinated Plan is also very much an implementation plan since it enables the distribution of federal funding under the New Freedom (transportation for people with disabilities), Job Access and Reverse Commute (JARC) (commute transportation for individuals with limited means), and 5310 (seniors and persons with disabilities) programs. The 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 JARC and New Freedom funding are tied to SAFETEA-LU which must be continually reauthorized by the federal government, while the *TransNet* funds are available annually and are scheduled to continue through the year 2048.

Detailed Plan Overview

Planning for public transit and human service transportation means that all publicly available transportation services have been brought under a single unified plan. Specifically, transportation services included in the Plan are those services offered by private companies, non-profit organizations, public transit agencies, SANDAG, and human services agencies. Given this broad approach, the Coordinated Plan represents a significant expansion of transportation planning activities conducted in the region and, as a result, brings forth a "one region – one network – one plan" concept of public transit and human services transportation.

It is inherent that the inclusion of public transit and human services transportation under one planning umbrella represents a "passenger-centered" approach to finding transportation solutions. However, this traditionally has not been the focus of RSRTPs. To accomplish this perspective, the Coordinated Plan draws upon a vast tool kit of transportation solutions ranging from conventional public transit to ride-sharing services, technological solutions, and volunteer programs. In the past, each agency was limited to the services within their own operation. This passenger-centered approach allows the region to look at mobility needs first, and then seeks to employ mobility management techniques to match the appropriate modal choice to the passenger.

To address the issues of climate change and rising transportation costs, the Coordinated Plan also has been developed around a central tenet of system coordination. The coordination among agencies actively involved in transportation helps remove inefficiencies caused by redundant or duplicative services, which in turn creates more sustainable solutions for the region. From a passenger perspective, this objective also is linked directly to helping individuals find the best transportation solution possible that meets their needs.

The following includes a brief overview of the various chapters of the Coordinated Plan.

Chapter 1 – Introduction

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

Chapter 2 - Community Outreach and Public Involvement

An extensive community outreach program was developed for this Coordinated Plan to satisfy federal requirements along with ensuring diverse public input to help provide insight into local transportation needs. This chapter outlines all of the outreach efforts associated with the Plan.

Chapter 3 – Public and Human Service Transportation Vision

The intent of the Coordinated Plan is to accommodate the visions and missions of four transportation agencies while implementing the goals and policies of the RTP. The process undertaken to develop such a consolidated vision is included in this section.

Chapter 4 – Goals, Objectives, and Monitoring

The Coordinated Plan includes a comprehensive policy framework which establishes goals and objectives to implement and measure the public and human services transportation in San Diego County. This policy framework allows SANDAG to carefully evaluate transit performance as required by the Transportation Development Act (TDA), and human services transportation performance as required by the Federal Transit Administration (FTA).

Chapter 5 – Passenger Demand Analysis

In order to provide appropriate transportation solutions for the region's population, an analysis of passenger demand is provided in this section. The information used to conduct this evaluation included an assessment of demographic data regarding regional population, housing, and employment trends. The development of an understanding of how these trends affect persons with limited incomes, individuals with disabilities, and older adults was also critical in determining the unique transportation needs of these population groups as required by SAFETEA-LU.

Chapter 6 - Transportation Inventory

This chapter provides a comprehensive inventory of the public transportation services available in the San Diego region. Services to and from the surrounding counties of Riverside, Orange, Imperial, and the border with Mexico, are also included in this inventory.

Chapter 7 - Needs Assessment

The needs assessment chapter includes the identification of existing transit service gaps, as well as the identification of other areas to improve the overall public transit and human services transportation network. Existing gaps and transportation needs included in this section were identified through the passenger demand analysis, public outreach activities (described in Chapter 2) and results of the system inventory update and survey (described in Chapter 6).

To determine the specific needs, the passenger demand analysis was combined with transit service and health and human service transportation information to further explore locations without existing transportation services.

Chapter 8 - Strategies and Project Prioritization

Chapter 8 identifies strategies to address the deficiencies and gaps in transportation services and to identify potentially redundant, unused, or duplicative services. The strategies included in this section were developed to respond to the needs identified as a result of various outreach efforts, demographic research, and spatial transit analysis. The public was invited to participate in prioritizing the list of strategies as part of the outreach effort described in Chapter 2. The prioritized list of strategies included in this chapter will be used as part of the evaluation of grant applications under the JARC, New Freedom, and Senior Mini-Grant programs. Creative and cost-effective solutions are emphasized in the strategies in order to expand the possibilities of developing an effective and efficient coordinated public transit and human services transportation system in the San Diego region.

Chapter 9 - Funding

The financial plan chapter describes the major sources of public transit and human services 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 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.

Chapter 10 - 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 Plan. This section also explains how SANDAG will monitor new and existing services based on the achievement of the goals, objectives, guidelines, and targets established in this document.

CHAPTER 1

INTRODUCTION

1 Introduction

1.1 One Region – One Network – One Plan

The Coordinated Plan has been prepared to meet the need for a short-range transit plan to implement the goals and policies articulated in the recently adopted Regional Transportation Plan (RTP) and fulfill federal requirements. The Coordinated Plan furthers and refines the RTP goals and in so doing, creates an implementation plan funded by local, state, and federal sources. The Plan involves the identification of transit needs from a passenger perspective and develops strategies and projects to meet those needs.

To fully understand potential ways that an individual's transportation needs can be met; all available alternatives must be included in the Plan so that these services can receive future support for improvements or enhancements. This Plan rolls all publicly available transportation services into one unified plan as required by federal legislation. The Plan includes those services offered by traditional public transit operators but also includes human and social service transportation providers. These types of providers can include private companies, non-profit organizations, regional transportation assistance programs and governmental or quasi-governmental social or human service agencies.

Given this broad approach, the Coordinated Plan represents a significant expansion of transportation planning activities conducted in the region and, as a result, establishes a "one region – one network – one plan" concept of service. The Plan seeks to improve transportation options by promoting coordination among agencies actively involved in transportation and by removing inefficiencies caused by redundant or duplicative services. It also is the intent of this Coordinated Plan to update existing gaps in service and to develop and prioritize strategies or projects designed to fill those service gaps.

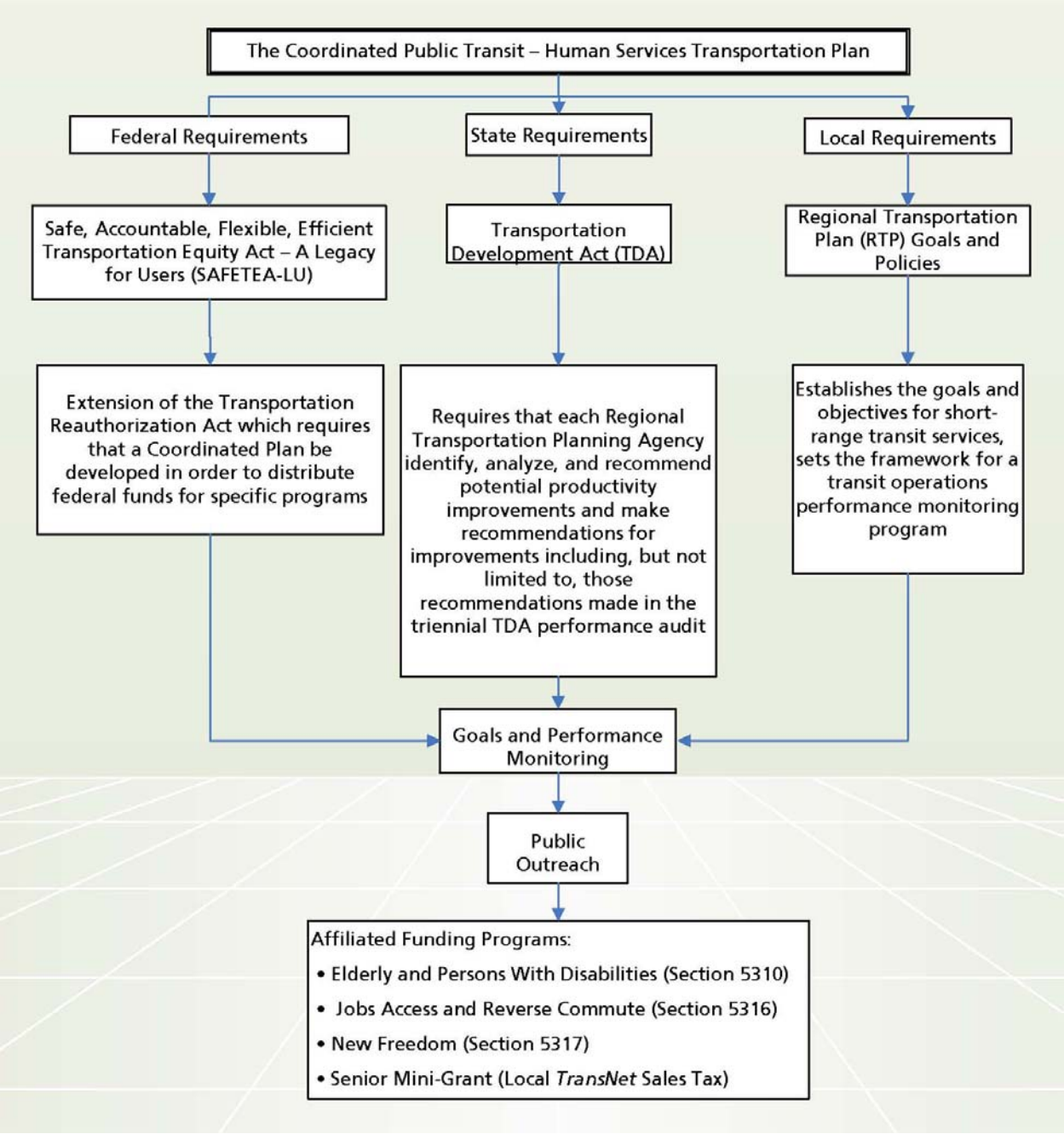
1.2 Plan Requirements

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

Federal Requirements: The Safe, Accountable, Flexible, Efficient Transportation Equity Act – A Legacy for Users (SAFETEA-LU) was signed into law by President Bush in 2005. This extension of the Transportation Reauthorization Act introduced a requirement that funding for three federal 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 (NF) (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 (NF), and older adults (5310).

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.

Figure 1.1: Coordinated Plan Requirements and Components



SANDAG, as the Regional Transportation Planning Agency (RTPA) for San Diego, is responsible for the allocation of TDA funds to the region's cities, the County of San Diego, and transit operators. Pursuant to California Public Utilities Code (PUC) Section 99244, a transit operator can be allocated no more in the next Fiscal Year than it was in the current Fiscal Year unless SANDAG determines that the operator made a reasonable effort to implement the productivity improvement recommendations adopted by the SANDAG Board of Directors. The determination of reasonable efforts is included in this plan to assist in the distribution of TDA funds.

Local Requirements: SANDAG requires that a Regional Short-Range Transit Plan (RSRTP) 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 RSRTP 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;
- 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 Plan also makes the distribution of local funding for senior programs possible (through the Senior Mini-Grant program) which was created through the regional transportation sales tax extension measure (*TransNet II*). In order to enhance and promote coordination, all projects funded by the Senior Mini-Grant program must also be derived from the Coordinated Plan.

1.3 A Passenger-Centered Approach

In addition to bringing public transit and human service 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, ADA Paratransit, human service transportation programs, or volunteer driver programs.

This Plan also looks at the type of passenger and includes those individuals who are considered to be discretionary riders (who have available a personal vehicle but ride transit based on a personal preference). Planning for these riders represents significant transit expansion opportunities since these riders represent a potentially large but yet untapped ridership base as only 6 percent of work trips were taken on transit in the San Diego region in 2006.

1.4 Public Transit Evaluation

The incorporation of human 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 RSRTPs 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 Transportation Development Act (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 human service transportation. These groups, which have been federally mandated for inclusion in the Coordinated Plan, are:

1. Persons with limited means: Refers to an individual whose family income is at or below the 150 percent poverty line threshold set in SAFETEA-LU.
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 use effectively, without special facilities, planning, or design, public transportation service or a public transportation facility.
3. Older adults: Includes, at a minimum, all persons 65 years of age or older.

To identify transportation needs and potential solutions for these populations, demographic research data has been refined and evaluated with feedback incorporated from the outreach efforts conducted for this Plan.

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, human 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 non-profit sectors;
- An assessment of transportation needs for individuals with disabilities, older adults, 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.

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 Plan has also 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 Plan. This process involves the preparation of the annual Service Implementation Plans (SIP) which are prepared by the transit operators and incorporated into the Coordinated Plan to address annual service changes and improvements.

CHAPTER 2

COMMUNITY OUTREACH AND PUBLIC INVOLVEMENT

2 Community Outreach and Public Involvement

The local, state, and federal requirements for short-range transit planning mandate extensive public outreach and opportunities for the public review. These minimum requirements and more were incorporated by SANDAG into the development of this Coordinated Plan for the San Diego region. SANDAG utilized multiple community outreach and public involvement techniques for this 2008 update.

2.1 Outreach Requirements

An extensive public outreach component including a wide variety of organizations[1] is required for the development of the Coordinated Plan. Specifically, the federal guidance states that the Coordinated Plan must be developed through a process that includes the representatives of public, private, and non-profit 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 individuals with disabilities, older adults, and people with low incomes. The guidance also recommends consultation with an expansive list of stakeholders throughout all phases of the Coordinated Plan development.

2.2 Public and Stakeholder Involvement

SANDAG involved a comprehensive group of stakeholders and members of the public in its outreach activities with those individuals deeply involved in the process of developing the Coordinated Plan.

Social Services Transportation Advisory Council

The main group involved in the development of the Coordinated Plan was the Social Services Transportation Advisory Council (SSTAC). The mandate of SSTAC is to respond 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 and oversee the development of the Coordinated Plan; particularly the aspects of the plan involving the determination of passenger needs and strategies to meet those needs.

[1] Organizations may include but are not limited to state, local officials and elected representatives/tribal governments, private/public/non-profit/ADA transportation providers, human 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.

In order to ensure consistent participation in the plan development by stakeholders and members of the public, the SSTAC provided input and feedback at both regular and special meetings. On January 18, 2008, SANDAG's Transportation Committee acted to revise the membership structure and charter for the SSTAC. The charter was amended to include the additional responsibility of overseeing the development of the Coordinated Plan and the membership of SSTAC was amended to include representatives from the two transit operators in San Diego County. The new composition of this group includes:

a. One representative of potential transit users who is 60 years of age or older
b. One representative of potential transit users who is a person with a disability
c. Two representatives of local social service providers for seniors, including one representative of a social service transportation provider
d. Two representatives of local social service providers for persons with disabilities, including one representative of a social service transportation provider
e. Two representatives of local social service providers for persons of limited means, including one representative of a social service transportation provider
f. Two representatives from the local CTSA with one CTSA member representing the North County Transit District (NCTD) service area and the other CTSA member representing the Metropolitan Transit System (MTS) service area
g. One representative from NCTD representing fixed-route service
h. One representative from NCTD representing Americans with Disabilities Act (ADA) service
i. One representative from MTS representing fixed-route service
j. One representative from MTS representing ADA service

Appendix A contains the SSTAC meeting summaries from the meetings where the 2008 update to the Coordinated Plan was discussed.

2.3 Community Outreach Efforts

Social Services Transportation Advisory Committee (SSTAC) Public Hearing

The California Public Utilities Code (CPUC) requires that SSTAC hold at least one noticed meeting to receive comment from the public on transportation issues. In 2008, this meeting was held on February 20 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 for this meeting along with the agenda, meeting summary, and public comments received.

Sub-regional Coordinated Plan Outreach Meetings

SANDAG held nine sub-regional Coordinated Plan outreach meetings in addition to the publicly noticed meetings sponsored by SSTAC. Two outreach meetings were held in each of the four sub-regions of San Diego County (North, South, East, and Central): one meeting was held for members of the public, and one for social service agencies and other transportation providers. Additionally, one outreach meeting was held in the rural area in which members of the public were invited along with representatives of transportation providers in the rural areas of the County.

Invitations were mailed out to 626 invitees for the seven outreach meetings. Of those, 518 were sent out to representatives at Health and Human Services Agencies (HHSAs). Additionally, invitation letters were sent out to the city managers and all the unified elementary and high school districts. Moreover, press releases appeared in all the regional newspapers for the outreach meetings. Table 2.2 details the number of invitations that were sent out by type of interested party.

Table 2.2: Number of Public Outreach Invitations Sent by Provider

Health and Human Service Agencies	518
School Districts and Transit Operators	68
Tribal Nations	20
Cities and San Diego County	20

The outreach meetings commenced with a brief introduction explaining why the participants were invited to the meeting, followed by a PowerPoint presentation that explained the Coordinated Plan, purpose, required elements, and associated funding opportunities. Participants were presented with the list of strategies from the first adopted Coordinated Plan and new strategies were solicited. Each participant was also invited to participate in an exercise to help rank the relative priority of the strategies. Appendix A contains copies of the postcards and press releases used to notify participants of the meetings, the affidavits of newspaper publishing, the list of organizations that received invitations, and meeting summaries for the sub-regional outreach meetings, and handouts of the PowerPoint slides.

Surveys

SANDAG used a phone survey to assess what transportation options were available to the residents of San Diego County. Two hundred and eight agencies were contacted. Of those, 97 provided responses, of which, 56 were transportation providers. Through the survey, participants were asked about the service are of the operation, enrollment or program requirements, hours and days of operation, and vehicle types. This phone survey was used to update the inventory of social service transportation services available in San Diego County.

Public Comment Period

SANDAG's 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, as well as has the opportunity to provide SANDAG with input so plans can reflect the public's desire. In accordance with this policy, any new transit service plans must be available in draft form for public review at least 15 days before the final report is taken to SANDAG's Transportation Committee for approval. Comments received for the Coordinated Plan within the comment period and revisions may be included in the final document.

CHAPTER 3

PUBLIC AND HUMAN SERVICE TRANSPORTATION VISION

NCTD SANDAG FACT Full Access & Coordinated Transportation MTS℠

3 Public and Human Service Transportation Vision

The Coordinated Plan is an attempt to synthesize the missions of the four local transportation agencies into a coordinated transportation approach for San Diego County. These agencies include:

- SANDAG;
- Metropolitan Transit System (MTS);
- North County Transit District (NCTD); and
- Consolidated Transportation Services Agency (CTSA)

NCTD and MTS are transit operators, while FACT was contracted to serve as the Consolidated Transportation Services Agency (CTSA) on behalf of SANDAG in 2006. FACT is a special purpose agency dedicated to improving, consolidating, and coordinating health and human service transportation in the region. FACT does not currently operate any services, however, it is expected that it will become a mobility manager in the future. SANDAG is the regional transportation planning agency with specific responsibilities for long-and short-range transit planning. The mission/vision statements of the four agencies are included in Appendix K.

3.1 Creating a Consolidated Vision

A recurring theme of the transit agency visions and that of the CTSA is the idea of providing a customer-focused system that provides high-quality services that are sustainable while, at the same time make the best use of available resources. These themes are consistent with the focus of the SANDAG Regional Transportation Plan (RTP).

The RTP is our region's blueprint for a transportation system that enhances our quality of life and identifies our mobility needs to 2030.[1] The Plan's vision for transportation supports the region's comprehensive strategy to promote smarter, more sustainable growth. The RTP focuses on the development of a flexible transportation system that focuses on moving people and goods – not just vehicles. The vision is to provide more convenient, fast, and safe travel choices for public transit, ridesharing, walking, biking, private vehicles, and freight. It commits the region to preserve its existing transportation resources and to manage the regional transportation system efficiently.

At the core of the 2030 RTP are seven goals:

- Livability – Provide livable communities,
- Mobility – Improve the mobility of people and freight,
- Efficiency – Maximize the efficiency of the existing and future transportation system,
- Accessibility – Improve accessibility to major employment and other regional activity centers,
- Reliability – Improve the reliability and safety of the transportation system,
- Sustainability – Minimize effects on the environment, and
- Equity – Ensure an equitable distribution of the benefits among various demographic and user groups.

[1] The current RTP, "2030 San Diego Regional Transportation Plan: Pathways for the Future," (available at www.sandag.org/2030rtp), contains an integrated set of public policies, strategies, and investments to maintain, manage, and improve the transportation system in the San Diego region through the year 2030.[1]

The RTP envisions a regional transit system that is the first choice for trips made in the region. The long-range transit vision calls for a network of fast, flexible, reliable, safe, and convenient transit services that connect our homes to the region's major employment centers and major destinations. This vision was first developed in 2001 when SANDAG, the Metropolitan Transit System (MTS), and the North County Transit District (NCTD) adopted the Regional Transit Vision, setting in place the framework for transit improvements in the 2030 RTP.

The 2030 RTP identifies the transit improvements that have the highest priority for the region. The identified services will help to boost transit ridership and help achieve an increased transit mode share along key corridors during peak periods. The identified services fulfill a variety of network functions, but particularly offer competitive travel times to major job centers. The 2030 RTP also acknowledges the role played by social service transportation which was missing from previous RTPs.

3.2 Further Refining the RTP

The role of the Coordinated Plan is to identify a list of activities and projects from the RTP that can be implemented over the next five years within the context of available funding and other service changes desired by SANDAG, MTS, NCTD, and the CTSA. The Coordinated Plan also combines human services transportation with transit under a regional transportation planning umbrella as outlined in the RTP.

CHAPTER 4

GOALS, OBJECTIVES, AND MONITORING

4 Goals, Objectives, and Monitoring

4.1 Purpose

The performance monitoring program was developed to retain a regional perspective on the transportation system as a whole but was also conducted to assist the transportation agencies with their evaluation of current or future service expansions or contractions. The evaluation of human and social service transportation is also included to develop an understanding of these types of programs and how they contribute to the host of transportation solutions available.

This chapter begins with an overview of the goals and policies of the Regional Transportation Plan (RTP) and how they have been refined and enhanced in this 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 human service transportation system over the next five years. Finally, since transit funding is also tied to state funding sources, a description of the state mandated evaluation process is also included in this chapter.

4.2 Goals

In order to present the basis for evaluating transit and human service transportation in the San Diego region, a series of nine goals for the coordinated transportation network in San Diego was developed. These goals were based on the visions of the four agencies (MTS, NCTD, CTSA, and SANDAG) involved in planning and operation of the transportation system along with the overarching goals of the RTP identified in Chapter 3.

The Coordinated Transportation goals are:

1. To 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;
2. To provide an accessible transit network in the suburban areas that offers direct service along commute corridors with critical mass featuring rapid, frequent service during peaks with seamless coordinated transfers, and local service focused on smart growth areas and lifeline needs;
3. To provide accessible lifeline public and human service transportation in rural areas,
4. To maximize the farebox recovery rate and ensure that operation of the transit system is fiscally responsible;
5. To offer accessible public and human service transportation services that are productive, coordinated, convenient, and appropriate for the markets being served;
6. To offer accessible public and human service transportation services in San Diego that are reliable and offer competitive travel times to major destinations;
7. To offer accessible public and human service transportation services that support the smart growth policies as outlined in the Regional Comprehensive Plan (RCP);
8. To offer accessible public and human service transportation services in San Diego without discrimination on the basis of race, color, national origin, or disability; and
9. To enhance the mobility choices of the transportation disadvantaged by improving coordination and developing alternative models of transportation.

4.3 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 human service transportation as required by the federal government in SAFETEA-LU.

Regional Transit Service Monitoring and Links to the Regional Transportation Plan

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 RTP, which includes several action items relevant to the evaluation of transit and social service transportation performance. These action items are:

- Facilitate efforts to promote coordination among fixed-route and paratransit operators and non-profit agencies in the region;
- Improve accessibility of transit stops and walkways to stops for persons with disabilities and identify potential funding programs for these improvements;
- Improve connections and transfers between paratransit and fixed-route transit operators
- Continue educational efforts on the use of transit and accessibility equipment among persons with disabilities;
- Continue to use the SANDAG Social Services Transportation Advisory Council (SSTAC) to recognize the changing transit needs of seniors and persons with disabilities, including those too frail to access traditional fixed-route and ADA paratransit services;
- Implement and expand the *TransNet* Senior Mini-Grant Program;
- Implement monitoring of regional transit service through the use of automated data collection and vehicle location systems;
- Work with the region's transit operators to ensure that transit services are available to minority, disabled, elderly, and low-income persons so that they have access to service, employment, and schools

Guidelines vs. Targets

Under these RTP action items, the general approach to evaluating transit and social service transportation includes the setting of guidelines where the requirement is a SANDAG policy and targets where state or federal regulations are involved. 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 may also 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 which will be addressed in the Service Implementation Plans (SIPs) which the transit agencies prepare.

The SIPs will normally be included as part of the Regional Short Range Transit Plan (RSRTP). However, due to the SPRINTER service/bus redesign at NCTD and budget deficiencies at MTS, the SIPs were not prepared this year since no additional funding was available for service improvements or enhancements. The performance results contained in this chapter also show that, while the service guidelines are certainly reasonable expectations for our transit system, current funding for public transportation in the region is not sufficient for MTS and NCTD to provide this level of service.

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, the evaluation of transit service performance may enable the justification for the programming of future funds for transit given the 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.

Transit Performance Evaluation Categories

The transit objectives are based on sub-regional areas that group similar geographic or demographic areas without reference to individual routes, services or transit operators. These objectives either relate to the goals of the RCP, the RTP, or have consistently been tracked through the annual Transportation Development Act (TDA) performance improvement program. The passenger-centered transit objectives address the following categories:

- Productivity
- Ridership
- Access
- Convenience
- Reliability
- Service Speed
- Environmental Justice
- Comfort

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. 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 human service transportation.

Service Zones

The Coordinated Plan must integrate the Transit Vision of the 2030 RTP, the Smart Growth objectives of the RCP, the short-term service objectives of the MTS Comprehensive Operations Analysis (COA) and North County Transit District's (NCTD's) Fast Forward. 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 4.1. 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.

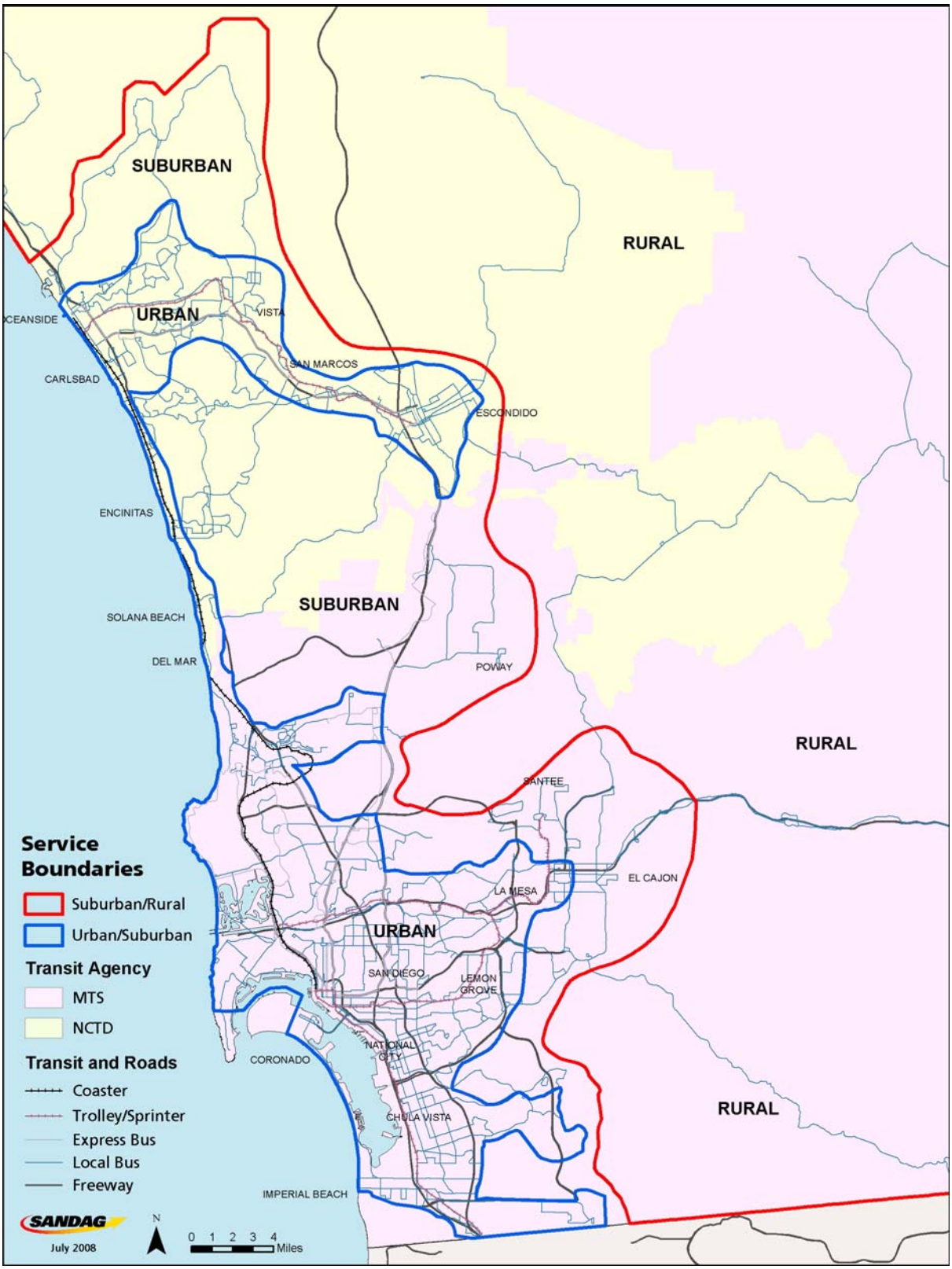
There are two Urban Zones in San Diego County, as shown in Figure 4.1. The larger Urban Zone extends from University City on the north to Imperial Beach in the south, and from the coast east to El Cajon. The second Urban Zone follows the SPRINTER Corridor and includes parts of Oceanside, Escondido, Carlsbad, Vista, and San Marcos. 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 each of the two Urban Zones. 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 transit friendly. The result is that spontaneous transit use would be difficult to achieve even if a high-level of service is provided. Thus, transit services in the suburban zone are best oriented towards 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 human service transportation. It may become necessary in the future to use the zones as means of prioritizing human service transportation needs and expenditures. For example, it seems unlikely that the region will be able to provide the same level of human service transportation services and mobility choices for people living in rural areas as for those people who are living in urban areas.

Figure 4.1: Service Zones



Transit Objectives

The objectives outlined below are designed to provide the quantifiable outcomes for the transit related goals articulated earlier in this chapter. The evaluation of services does not capture changes to the NCTD system related to the commencement of SPRINTER service and the associated bus network changes since these changes occurred in FY 2008. The performance of each agency is included while the detailed tables listing the quantitative performance data are included in Appendix L. However, the data specifically used to evaluate the Environmental Justice objective is included in Appendix H.

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. This 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.

Objective: For each transit agency to meet or exceed the minimum TDA target for farebox cost recovery

Target: Percentage of operating costs recovered from fare revenue for fixed-route and demand responsive services

Results: Both transit agencies met the performance targets for this objective. MTS system cost recovery was about 37 percent while NCTD's was about 25 percent.

Growth Objective

In San Diego, ridership growth has traditionally been measured against growth in population. This is now expanded to include measuring the growth in transit ridership against the change in employment and the growth in the number of vehicle registrations. The comparison against job growth is particularly important as more workers live in Riverside County and México. 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 (TOD), 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: Percentage rate of growth in transit ridership by operator

Results: In FY 2007, transit ridership growth outpaced all other growth indicators (population, employment, and rate of vehicle registrations) in the region. This ridership growth was led by MTS, where ridership on its services increased by 3.75 percent, well above the other three indicators. This can be attributed to the full impact of the MTS COA which emphasizes ridership and productivity and was fully realized in FY 2007.

Ridership did not increase at the same rate in the NCTD service, where transit ridership increased by 0.28 percent in FY 2007, which was not matched by increases in population, jobs, and vehicle registrations (1.56 percent, 0.60 percent, and 3.17 percent respectively). However, NCTD has undertaken a comprehensive revision of its BREEZE bus system to better coordinate its service with the recent deployment of the SPRINTER rail service along the State Route 78 corridor. NCTD expects that the SPRINTER service and the reorganization of BREEZE routes will increase ridership within the District boundaries over the next five years. However, meeting this indicator will be challenging since most of the new population growth has occurred in the periphery where there is either no transit service or money to expand any existing services.

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 or not 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.

Objective: To operate transit services that are productive, convenient, and appropriate for the markets being served

Guideline 1: Average annual revenue passengers per revenue service hour by operator

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

Load factor also provides a passenger centric means of evaluating productivity and the attractiveness of service.[1] 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 hours.[2]

Guideline 2: Average percentage of seats occupied (load factor)

Results: The FY 2007 load factor evaluation revealed that both MTS and NCTD met all but one guideline each for this category. MTS did not meet the 20 percent guideline for the Community Bus/Urban/Weekday services with an average of 19 percent due to sub-20 percent load factors from Route 871/ 872 (a circulator service in El Cajon and with planned reductions in service in FY 2009). NCTD fell short of the Corridor/Urban/Weekday guideline of 40 percent with an average of 36 percent for this category. This was due to the performance of Routes 310 and 320, which have since been discontinued.

[1] Transit productivity is impacted by non-productive 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.

[2] 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 Americans with Disabilities Act (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 plan and to ensure that this indicator is tracked and the appropriate authorities are reminded of their responsibilities.

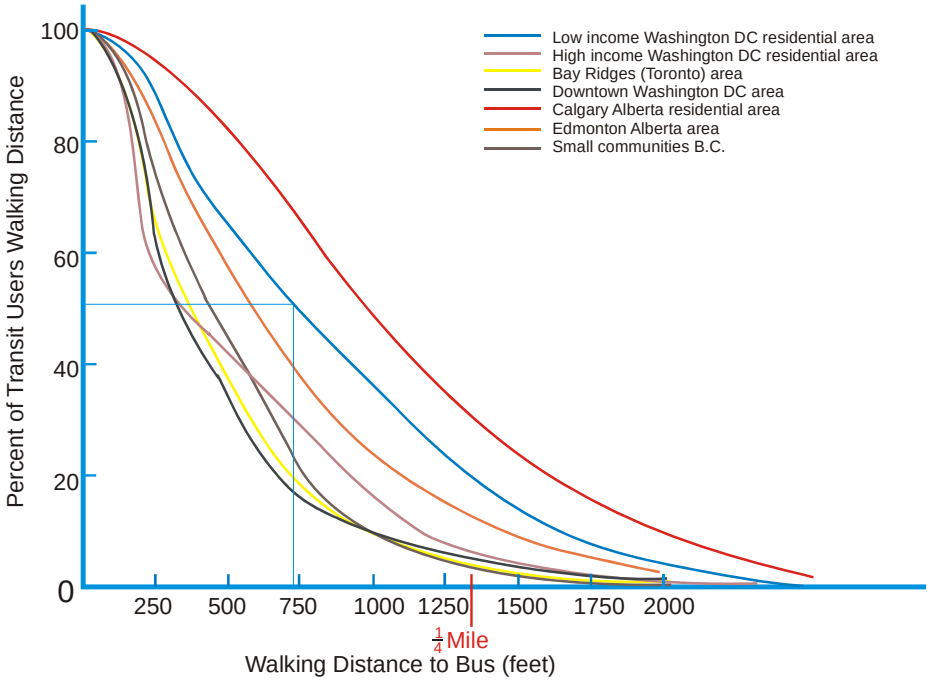
Walking Distance

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 U.S. and Canada have shown that about half of all transit passengers walk less than 750 feet to a bus stop. The graph in Figure 4.2 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 non-work 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.

Figure 4.2: 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: Distance of residents or jobs from a bus stop or rail station in urban areas

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

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

Guideline 1: Percent of suburban residences within a specific distance of a park-and-ride facility with regional or corridor services

Results: Park-and-ride facilities in both MTS and NCTD service areas met the guidelines for this objective. The operators are engaged in the development of park-and-ride facilities but are often not responsible for their implementation.

Guideline 2: Distance of residents or jobs from a bus stop or rail station in suburban areas

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

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: All of the "existing/planned" smart growth areas included in the SANDAG Smart Growth Concept Map are served by the requisite levels of transit specified in the RCP. The vast majority of "potential" smart growth areas are also served by transit. However, some areas do not have the level of transit service called for in the RCP including five areas[3] without the desired levels of regional transit service. SANDAG will look into incorporating service improvements in these areas with the next revision of the Regional Transportation Plan since SANDAG is responsible for the planning, development and implementation of regional services.

The remaining two areas[4] fall under MTS's responsibility as they call for high frequency local and not regional service. There is a recognition that, while service to Smart Growth areas is desirable, implementing higher levels of service needs to be justified based on the overall transit demand potential of the area. As such, MTS will continue to review the demand potential in these potential smart growth areas compared with the demand potential in other areas where service improvements are needed. Given the current budget shortfall faced by MTS, the ability to implement service improvements will likely be constrained over the next several years.

[3] Village 2 Community Center (CV-13), Downtown Coronado Town Center (CO-1), Pomerado Hospital Special Use Center (PW-2), Carmel Valley Community Center (SD-CV-1), and the Otay Mesa/Southwestern College Special Use Center (SD-OM-3).

[4] The City Heights Mixed-Use Transit Corridor (SD-CH-2) and the Uptown Mixed-Use Transit Corridor (SD-UP-3).

Lifeline Services

The evaluation of lifeline services helps to ensure that at least some level of service is provided to areas which have been identified as smart growth opportunity areas.

Objective 4: Transit to maintain existing lifeline services to currently identified rural village smart growth areas

Guideline: Number of days per week with at least one return trip to destinations from rural villages identified on the Smart Growth Concept Map

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

Objective 5: To provide fully accessible bus stops and transit stations

Guideline: Percentage of bus stops and transit stations that are fully accessible

Results: MTS does not currently meet the targets established for this category since 542 stops of the 4,363 known stops with accessibility data do not meet the criteria. Additionally, 494 stops are unknown representing 10 percent of the total stops in the MTS service area. MTS will finish developing a comprehensive inventory of all of its bus stops in the next year so that MTS may seek grant funding and develop a plan to prioritize the retrofit non-ADA compliant stops. No inventory of stops exists in the NCTD service area a determination of this indicator is not possible. As discussed earlier, the constrained budget situation at NCTD limits the ability of the agency to look at adding service or developing a comprehensive bus stop inventory. NCTD will look to pursue alternative funding for the bus stop inventory given the current financial constraints. The lack of data or evidence of deficient bus stops points to the need for additional funding in this category.

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 15 minutes for bus and 20 minutes for rail consistent with the RTP. This recognizes the high cost of reducing rail headways below 20 minutes but also helps determine if adequate regional funding has been provided for these services.

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

Guideline: Percentage of stops provided with service within specified timeframes for each zone designation

Results: Both agencies fell short of the weekday guidelines for this objective

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

Results: The performance results for the frequency performance measure were mixed with both MTS and NCTD falling short of 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 road.[5]

The current policy allows buses to operate up to one-minute ahead of schedule. The proposed regional guidelines eliminate this leeway. The target guideline for local and community bus service has been lowered to 80 percent from the current standard of 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 targets 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 or not 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. MTS considers an ACCESS trip to be on time if the passenger is picked up within a ten-minute window surrounding the promised pickup time. In FY 2007, MTS was able to achieve 96.5 percent on time performance based on this standard, which offers a very high-level of service compared to most large urban areas in the country. MTS has advised that due to growing traffic congestion, and longer trip lengths, it may be necessary to either lengthen the ten-minute window, or reduce the percentage guideline for on time performance. The federal law does not specify performance levels for missed trips or schedule performance but does require a high-level of service be provided.

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.

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

[5] 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.

Results: Due to the current development of a new passenger counting program, the evaluation of FY 2007 data was not available for this indicator. However, in future years this metric will be included and evaluated.

Guideline 2: Percentage of completed trips

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

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

Results: Both MTS and NCTD met both 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: Since this is the first year that speed has been calculated as part of the Coordinated Plan performance measure process and that the performance guideline is based on a year-over-year comparison, the FY 2009 Coordinated Plan will include the first results of this indicator next year. Comparing this guideline over time will help assess the impact that increased congestion has on transit performance and, once implemented, how well transit priority measures can help mitigate this problem.

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 is on average comparable to the level of service and amenity provided in majority census tracts in the same geographic zone

Guideline: Percentage of minority and low-income census tracts with transit service that is on average comparable to the average level of service and amenities provided in majority census tracts of the same service zone

Results: An updated Title VI evaluation was conducted for this plan update and found that the transit operators provided service in minority and low-income census tracts that was of equal or better quality than service typically provided in majority 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 welcome 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 may also 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: Density of standees per square foot of available standing area.

Results: Data is not yet available to measure this objective.

Human Services

In the past SANDAG has had a very limited role in human service transportation. SANDAG has coordinated the local process for awarding FTA Section 5310 money for elderly and disabled transportation. SANDAG has also served as the Consolidated Transportation Services Agency (CTSA) for San Diego County and as the CTSA participated in some coordination strategies such as the STRIDE (Specialized Transportation Referral & Information for the Disabled and Elderly) Web site and coordinated training programs for human service operators. SANDAG has now been given the responsibility to develop a Coordinated Plan and to provide grant money to agencies providing human service transportation as a result of Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU).

The federal government has identified a total of five performance measures for the New Freedom and JARC human service transportation programs. In addition, SANDAG has developed three performance measures for the Senior Mini-Grant program, which is funded through the local transportation sales tax initiative extension (*TransNet*). In the Coordinated Plan, the emphasis is on understanding these indicators and developing a strategy to collect the information as the programs begin implementation following the 2007 competitive process. As with the transit performance objectives, the purpose of these measures is to look at the performance of the overall program, not specific grants or services.

Human Service Transportation Objectives

The objectives outlined below are designed to provide the quantifiable outcomes for each of the goals related to human service transportation as discussed in the goals section of this chapter. The federal government has identified five measures for evaluating the performance of transportation services funded through the human service provisions of SAFETEA-LU. These federal indicators have been restructured into the objective-guideline format to be consistent with the format for the transit objectives. In future years, it is anticipated that additional objectives will be developed as SANDAG becomes more involved in planning and funding human service transportation. The human service transportation objectives support the lifeline transit, productivity, nondiscriminatory, and mobility goals listed in Section 4.2.

New Freedom Objectives

The New Freedom program is a federal program intended to improve mobility choices for persons with disabilities. The FTA has mandated specific performance measures, but they have not set guidelines or targets. Since this is the first year SANDAG has been involved in these types of programs there is no baseline information to develop guidelines and targets for expected levels of performance. The guidelines or targets will be added in future Coordinated Plans.

Objective 1: To improve geographic coverage, service quality, or service times for transportation services for persons with disabilities in the current year, to be measured by:

- Improved geographic area in square miles where services are being provided under New Freedom
- Improved service quality for disabled transportation
- Improved service times for disabled transportation

Objective 2: To add or improve 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

Objective 3: To attract riders to New Freedom services (as measures by one-way trips), to be measured by:

- Improved number of one-way trips on New Freedom service

JARC Program Objectives

Job Access and Reverse Commute (JARC) is a federal program intended to improve mobility choices for employment related travel for persons of limited means. The FTA has mandated specific performance measures, but they have not set guidelines or targets. Since this is the first year SANDAG has been involved in these types of programs, there is no baseline information to develop guidelines and targets for expected levels of performance. The guidelines or targets will be added in future Coordinated Plans.

Objective 1: To increase the estimated number of jobs that can be accessed as a result of geographic or temporal coverage of JARC projects implemented in current year, to be measured by:

- Number of jobs within a quarter mile of a stop on a JARC funded services

Objective 2: To attract riders to new JARC services (as measured by one-way trips):

- Number of one-way trips on JARC funded service

Senior Mini-Grant Program Objectives

The Senior Mini-Grant program is a local program funded through the *TransNet* sales tax initiative extension. SANDAG has included the requirement that all projects funded through the Senior Mini-Grant program be included in the Coordinated Plan, similar to the federal requirements under the JARC and New Freedom programs. Additionally, SANDAG has developed performance measures specifically for the evaluation of Senior Mini-Grant projects. The evaluation of the below indicators will be added in future Coordinated Plans.

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

- Operating cost in dollars per vehicle service hour

Objective 2: To evaluate the cost-effectiveness of a project, to be measured by:

- Operating cost in dollars per passenger

Objective 3: To evaluate the service effectiveness of a project, to be measured by:

- Passenger seat utilization

Coordination Objective

The major initiative of SANDAG to improve transportation coordination among health and human service transportation providers has been the creation and funding of the Consolidated Transportation Services Agency (CTSA). In 2006, SANDAG designated Full Access & Coordinated Transportation (FACT) of Oceanside to be the CTSA for San Diego County.

The role of the CTSA is to improve transportation service required 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 consolidate and coordinate transportation services to people with disabilities, senior citizens, social service agencies, health care providers, various organizations, and individuals within that particular service area.

Since this is only the second year SANDAG has actively been involved in promoting coordination of programs there is no baseline information to develop guidelines and targets for expected levels of performance. The guidelines or targets will be added in future Coordinated Plans. However, the following objective has been 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, vehicle brokerage, coordinated service, etc., to be measured by:

- Increase in the number of human service programs including coordinated transportation as an integrated component

4.4 TDA Productivity Improvement Program and Performance Monitoring

In addition to matching the RTP Action Items to the elements of the performance monitoring program, one specific action item references the TDA and states that SANDAG is to:

- Implement the service productivity and other recommendations from the performance audit process of the TDA

This Action Item is accomplished through the 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.[6] 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.

A transit operator can be allocated no more in FY 2009 than it was allocated in FY 2008 unless SANDAG determines that the operator made a reasonable effort to implement the productivity improvement recommendations adopted by the SANDAG Board of Directors for the current FY. The FY 2008 productivity improvement program consisted of the following performance indicators as approved by the SANDAG Board of Directors in FY 2007:

1. Productivity (measured by passengers per revenue hour);
2. Service efficiency (measured by operating cost per passenger and farebox recovery ratio);
3. Quality of service (measured by on-time performance and percent of completed trips); and
4. Service effectiveness (measured by the transit ridership growth relative to population growth).

SANDAG determined that both MTS and NCTD made reasonable efforts towards achieving their FY 2008 productivity goals. This assessment is included in Appendix J.

Part of the FY 2008 evaluation includes the setting of FY 2009 performance indicators. In order to provide a closer link to the TDA legislation, the FY 2009 productivity improvement program includes all six of the specific suggested indicators included in Section 99246 of the TDA (the same used to evaluate the service on a triennial basis). These performance improvement indicators are:

1. Operating cost per passenger (adjusted for annual inflation)
2. Operating cost per revenue hour (adjusted for annual inflation)
3. Passengers per revenue hour
4. Passengers per revenue mile
5. Revenue hours per employee
6. Farebox recovery ratio

Specific targets have not been established for FY 2009, however, the evaluation of the above six indicators will be used to evaluate whether the transit agencies are improving their performance in light of external circumstances. Under this program, trend data will be developed for a rolling three-year period to eliminate concerns over aberrations which can occur with the evaluation of only one FY (i.e., fuel price fluctuations, troop deployments, etc.). If trend data suggests that performance is weakening or declining, SANDAG and the transit agencies work together to understand the factors behind the decline and develop strategies for reversing the trend.

[6] The TDA provides funding for the region's public transit operators and for non-motorized transportation projects and, as the Regional Transportation Planning Agency, SANDAG administers the TDA funds.

4.5 Composite FY 2005 – 2007 Transit Performance Results

A composite index[7] of the six TDA performance measures was developed to help determine the overall trends for each of the evaluated transit services. The index is a precursor of what will be used to evaluate performance under the FY 2009 TDA productivity improvement program. Declining performance of any particular operator is not to be seen as a criticism of the service itself but rather a validation of the need for additional funding sources which may be available. 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. Services exhibiting improving performance enable the operators and SANDAG to understand that plans (such as the MTS COA and NCTD SRPINTER bus re-design) are targeting the specific types of improvements which were originally prioritized. Charts illustrating transit agency performance (composite and detailed individual measures) are included in Appendix J.

The results for the FY 2005 - 2007 TDA analysis reveal that:

- ***MTS Trolley*** performance continued to experience an overall improvement trend (+2 percent) based on the three-year evaluation. Improved Trolley performance has generally resulted from increased passenger volumes outpacing increased revenue miles and revenue hours. In addition, the operating cost per passenger has stabilized based on the continual increase in passenger volumes.
- ***MTS Bus*** overall performance improved 3 percent through the fourth quarter of FY 2007, which marked a shift from flat or negative trends seen in previous years. Factors contributing to the improved performance include reduced operating cost, increased passengers, decreased revenue hours, and stable employee levels. The improvements in performance have generally followed the Phase I and II implementation of the MTS COA.
- ***NCTD COASTER*** overall performance experienced a slight decline (-2 percent) over the past three years ending in the fourth quarter of FY 2007. This decline can be linked to increases in operating costs (due primarily to rising fuel costs and the contract with the new operator). In addition, increased revenue hours have outpaced increased ridership over the three-year period. However, ridership reached an all time annual high in FY 2007 with the fourth quarter representing the single highest quarter on record. NCTD also has been developing services specifically for Padre baseball games and other special events, which have typically raised overall performance for those trips based on the popularity of the services. SANDAG will continue to monitor this service to see if improvements are made over the course of FY 2008, given the change to a new operator and continuing increases in ridership due to the rising costs of auto commuting.

[7] The inverse of the operating cost performance measures were applied to the index to ensure that improvements equaled scaled increases. Without the inverse application, any decrease in operating costs would be shown as a negative result.

- ***NCTD BREEZE*** overall performance continued to trend slightly downward with a total decline of 1 percent over the three-year evaluation period. Most indicators declined over the evaluation period with the exception of those that evaluate cost-effectiveness and efficiency. Improvements in these categories were the result of declining operating costs that were lower than the passenger reduction and the rise in revenue hours. The declining operating costs were partially due to a reduction in the amount of overtime paid to drivers, which was replaced by the hiring of several full-time drivers. In addition, the fare and route changes which took place in the beginning of FY 2007, appear to have had little affect on fixed-route bus performance. However, this service is expected to undergo other changes with the implementation of the SPRINTER in FY 2008. SANDAG will evaluate the impacts of those changes once year-end FY 2008 data is received.
- ***MTS DART*** service was substantially reduced after FY 2004 to eliminate inefficient services. Not surprisingly, overall performance has trended downward by 2 percent, due to large declines in fare revenues and passengers that have outpaced declining operating costs. However, this service was eliminated by MTS in June 2008.
- ***NCTD FAST*** service overall performance reflected continued minor declines over the three years yielding a 6 percent reduction between FY 2005 and FY 2007. As a result, this service is proposed to be eliminated during the first quarter of FY 2009.
- ***MTS ADA*** service overall performance decreased by 1 percent over the past three years due to mixed performance results. The service saw an improvement in three of the indicators and declines in the remaining three. Both indicators measuring cost-effectiveness and efficiency experienced improvements due to reduced operating costs matched by increased passengers and revenue hours. In addition, passenger increases outnumbered revenue hour increases which yielded positive service productivity. Alternatively, fare revenue dropped considerably more than operating costs yielding a reduction in farebox recovery, while the increased number of employees was not matched by similar increases in revenue hours. However, this service still remains above the 10 percent farebox recovery threshold required by the TDA. In addition, fares for this service are scheduled to increase effective January 1, 2009, which should yield a positive impact on farebox recovery levels.
- ***NCTD ADA*** service experienced an overall decline of 10 percent over the three-year period. FY 2007 saw the introduction of a new operator (Laidlaw Transit) which yielded some positive trends. Under the new vendor, positive performance improvements have been shown in both service productivity categories. However, labor productivity has declined with the new vendor due to the increase in Full-Time Equivalent (FTE) employees that were not matched by proportionate changes in revenue hours. On the positive side, the additional staff has helped reduce the service denial rates, which were relatively high under the previous vendor but are not part of the six-indicator evaluation. Additionally, and of a more serious concern, is the year-ending farebox recovery ratio. The evaluation revealed a reduction of 3 percent ending in a quarterly farebox recovery of 9.88 percent for the fourth quarter. The annual farebox recovery for FY 2007 was 11.62 percent. However, this declining farebox recovery ratio remains above the annual minimum of 10 percent set in the TDA.

4.6 TDA Performance Audit Recommendations

In addition to the annual productivity improvement program assessment, TDA law requires that once every three years SANDAG commission a performance audit of each transit operator receiving TDA funds, as well as an audit of SANDAG as the administrator of the program. The most recent performance audit was completed in 2007 for the 2004 to 2006 FYs which generated recommendations for the transit agencies. The transit agency responses to these recommendations are included in Appendix J as part of the TDA productivity improvement program assessment.

4.7 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 bulleted items discuss the status of technical advancements and improvements to the data collection process expected over the next several years.

- **Transit System:** The Regional Transit Management System (RTMS) is a sophisticated management tool providing for real-time performance monitoring and reporting for more than 50 percent of the region's fixed-route services. Through the annual Passenger Counting Program, transit ridership information is reported to the transit districts using data from the RTMS automated passenger counters, collected manually, and supplemented by each transit district's own payment-based counts and other transit operational data. However, the passenger counting program is undergoing a major change, which will ultimately provide a more streamlined reporting process, improved Web interface, and the ability to covert data spatially using Geographic Information Systems technology. As such, the on-time performance evaluation tool included in the Passenger Counting Program was not available this year, but will be updated and included in future plan updates.
- ***T-PeMS*:** Planned improvements to the highway Performance Measurement System (PeMS) program (developed by UC 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 multi-modal 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.

CHAPTER 5

PASSENGER DEMAND ANALYSIS

5 Passenger Demand Analysis

It is implicit that a "passenger-centered" plan should include detailed information about the passengers being served and their transportation needs. Therefore, demographic information was examined for the Coordinated Plan to develop a better understanding of how these characteristics shape regional travel patterns. Chapter 6 explains the host of transportation services available while Chapter 8 provides strategies and prioritizes those strategies to address any unmet needs regarding the travel patterns identified in this analysis. The information used to conduct the passenger demand analysis included a detailed assessment of demographic information regarding population, car ownership, housing, and employment trends. In addition, detailed information about persons with limited incomes, individuals with disabilities, and older adults was gathered to help assess the transportation needs of these groups since they have a greater likelihood of being dependent on either the public transportation system or social service transportation networks to meet their daily transportation needs.

5.1 Regional Population

In the San Diego region, population densities vary throughout the County with the highest densities concentrated in the older, central neighborhoods and in some of the downtown areas of the region's larger cities. Downtown San Diego, Mid-City San Diego, National City, western Chula Vista, San Ysidro, Downtown El Cajon, Mira Mesa, the La Jolla University area, Escondido, San Ysidro, and the beach communities generally have the highest population densities (see map in Appendix M).

In addition, recent planning and development projects have yielded increased population growth in many of the suburban and rural communities in the region, especially eastern Chula Vista, Carlsbad, San Marcos, along the Interstate 15 (I-15) corridor, and in neighboring Riverside County. SANDAG's Smart Growth initiative is encouraging the development of new, higher density development along existing and future transit corridors.

The San Diego region surpassed the 3 million mark in 2003 in the midst of a 10 percent cumulative growth spurt occurring between 2000 and 2007. However, recent growth has slowed due to economic forces including the imbalance between wages and home prices. This has, in turn, led to increased development in neighboring regions. The majority of this growth has occurred in southwest Riverside County. However, East County, South County, Imperial County, and south of the border in Mexico have grown as well. San Diego also experienced significant out-migration in recent years, yielding an average annual total growth (foreign immigration and natural population growth minus out-migration) of only two percent over the last two years (2005 to 2007).

5.2 Regional Housing

While population increased by 10 percent over the last seven years (2000 to 2007), the development of new housing units in the region rose by 8.8 percent, suggesting a need for housing in the region. However, median home values, fueled by a diversifying economy and low interest rates, rose over 100 percent during the same period. This rapid increase in home values significantly outpaced increased wages, thereby creating a shortage of affordable housing in the region. At the same time, the recent development of market rate housing has not generally kept pace with population growth. The resulting affordable housing and jobs imbalance has resulted in the aforementioned out-migration to Riverside County, where approximately 32,000 residents now commute daily to San Diego jobs.

This phenomenon contributed to the growth of Riverside County, which reached the 2 million population mark in early 2007 and continues to grow due to the availability of relatively inexpensive land and the development of several new communities along the I-15 corridor. The managed lane program, by reducing congestion and introducing Bus Rapid Transit (BRT) on the I-15 corridor, will help to provide transit options to serve and also encourage this growth pattern.

5.3 Regional Employment

From 2000 to 2006, the labor force in San Diego increased by 9 percent which roughly matched the residential population increase during the same period. Most of the region's jobs are located within the urban areas of the region, especially in Downtown San Diego, Kearny Mesa, and Sorrento Valley/University Towne Center (see map in Appendix M). In order to determine which areas have the greatest volumes of commuting activity, a comparison of residential and daytime population was prepared. SANDAG develops estimates of the daytime population for various areas in the region. The daytime population of an area includes employees, students, shoppers and leisure visitors or tourists. These daytime populations can be compared with the known residential population of an area to estimate the volume of daytime commuters. Table 5.1 shows the net increase or decrease expected from the influx of daytime commuters into a specific area. The top ten areas with population increases during the daytime represent areas with a larger amount of commuters than residences while the bottom ten represent areas that are primarily residential.

Table 5.1: San Diego Daytime Population Differences (2004)

Rank	Area	Residential Population	Daytime Population	Difference (Daytime Population – Residential Population)	Percent Difference
Areas With Increasing Daytime Population (Top 10)					
1	Central San Diego	162,430	264,982	102,552	63%
2	Kearny Mesa	150,322	229,866	79,544	53%
3	University	55,526	98,537	43,011	77%
4	Del Mar-Mira Mesa	150,431	172,898	22,467	15%
5	San Marcos	79,376	98,066	18,690	24%
6	Peninsula	61,890	77,499	15,609	25%
7	Coronado	26,591	41,632	15,041	57%
8	El Cajon	122,695	130,415	7,720	6%
9	Alpine	14,925	19,277	4,352	29%
10	La Mesa	58,033	62,155	4,122	7%
Areas With Decreasing Daytime Population (Top 10)					
1	S.E. San Diego	159,852	110,153	-49,699	-31%
2	Mid City	170,610	151,054	-19,556	-11%
3	South Bay	136,685	120,368	-16,317	-12%
4	Oceanside	163,180	147,925	-15,255	-9%
5	Spring Valley	81,514	67,014	-14,500	-18%
6	Elliot-Navajo	89,788	75,411	-14,377	-16%
7	Vista	100,382	87,931	-12,451	-12%
8	Fallbrook	47,403	38,109	-9,294	-20%
9	Lakeside	55,859	46,906	-8,953	-16%
10	Sweetwater	104,548	95,914	-8,634	-8%

Source: SANDAG 2030 Regional Growth Forecast Update, Base Year Data

The four areas which experience the largest daily change in daytime population are Central San Diego, Kearny Mesa, the University of California San Diego (UCSD) university area and Del Mar - Mira Mesa. These four areas represent more than one third (36 percent) of the region's jobs. In addition, Coronado, with a daytime population increase of 57 percent, gains over 15,000 persons and represents a significant percentage increase in daytime population.

5.4 Regional Mobility

The robust economy of the earlier part of the decade coupled with the identified lack of affordable housing have yielded increasingly long commute patterns in the San Diego region. As a result, people travel between counties the way they previously traveled between neighborhoods. With people traveling further to reach jobs than ever before, many of them are spending significantly more time on the roads or at border crossings. However, the data shows that people in the San Diego region are also expanding their mobility options and choosing to take transit more frequently. Table 5.2 shows that the growth in transit ridership in the region has increased at a faster rate than either population, employment, or vehicle registrations from 2006 to 2007.

Table 5.2: Population, Vehicle Registration, and Transit Ridership (2005-2006)

	2006	2007	Difference (+ increase/- decrease)	Percentage Change
Population	3,064,113	3,098,269	+34,156	+1.11%
Jobs	1,310,900	1,320,000	+9,100	+0.69%
Vehicle Registration	2,443,893	2,510,095	+66,202	+2.71%
Transit Ridership	94,501,821	97,633,407	+3,131,586	+3.31%

Sources: SANDAG, Department of Motor Vehicles, MTS, and NCTD.

The continued migration of jobs and housing to the fringe areas of the region (including areas outside the County) point to the need for new regional transit services and new approaches to getting people to and from these areas. The low-density nature of development in these outlying areas (excluding Mexico), however, presents challenges to provide adequate transit access and to deliver cost-effective transit solutions. The focus of the 2030 RTP on urban core areas where land use patterns are more conducive to transit usage means transit investment to the non-urban core areas will be limited and in many cases focused on primarily serving home-to-work tripmaking versus a high-level of all-day service. In the urban core areas of the County, the higher investment in transit infrastructure matching the SANDAG Smart Growth initiative is dependent on fast, frequent, and reliable transit that can support spontaneous travel.

5.5 Demographic Analysis - Persons with Limited Means

The assessment of the residential, employment and mobility characteristics for persons with limited incomes is important since these individuals are often dependent on public transit to meet their trip making needs. 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. Table 5.3 illustrates the San Diego County population by poverty level from the Census 2000 to show the number of persons in poverty at the traditional 100 percent threshold in addition to the 150 percent poverty threshold. Census 2000 data was used since it is the most current data available for this population subgroup. Nearly 22 percent of the regional population earns less than 150 percent of the federal poverty level.

Table 5.3: San Diego County Population Percentage by Poverty Level

Year	< 100% Poverty Level		< 150% Poverty Level	
	Persons	Percent	Persons	Percent
2000	338,399	12.4%	592,991	21.8%

Source: Census 2000, Summary File 3 (SF3), Sample Data, Table P88 (Ratio of Income in 1999 to Poverty Level)

Based on the data contained in Table 5.3, setting the poverty line at the 150 percent threshold (as opposed to the 100 percent threshold) potentially doubles the number of persons eligible to benefit from the JARC program and illustrates the number of individuals included in the poverty definition under the Federal guidelines. The almost 600,000 individuals in poverty were mapped by Census Block Group to determine place of residence. The corresponding map of population densities for individuals in poverty at or below the 150 percent threshold is included in Appendix M.

Concentrations of individuals with limited incomes are highest in the denser urban areas of San Ysidro, City Heights, Southeast San Diego, National City, western Chula Vista, El Cajon, parts of Escondido, Vista and Oceanside, and the communities around Downtown San Diego.

High poverty rates are also generally associated with low rates of car ownership and higher rates of transit usage. A map of households with zero car ownership is also included in Appendix M. The correlation of individuals in poverty and areas with zero car ownership rates point to the need for good, high-frequency local transit services connecting the centralized urban communities with major job centers.

5.6 Mobility Assessment – Persons with Limited Means

The Census Transportation Planning Package (CTPP) data was used to conduct a mobility assessment of persons in poverty since it provides specific information on population subgroups such as persons in poverty and individuals with disabilities. The data was examined by Census Block Group to determine both residential and job locations. This data source and corresponding evaluation is particularly important to determine the commute trip transportation needs for individuals with limited incomes. This information can then be used to determine where funds from the federal JARC program should be spent to improve transportation for workers with limited means.[1]

Based on the CTPP data from 2000, there are about 170,000 persons below the 150 percent poverty threshold who work and presumably need to travel to their place of employment. This represents approximately 30 percent of the total persons below the 150 percent poverty threshold countywide. The densities of these residential locations shown in a map included in Appendix M. The overall poverty map and specific worker poverty map show similar concentrations of individuals with limited incomes. As is the case with the general population, poverty is higher in the denser urban areas of San Ysidro, City Heights, National City, western Chula Vista, El Cajon, parts of Escondido, Vista, Oceanside, and the communities around Downtown San Diego. However, there are a few notable exceptions where workers in poverty are much more heavily concentrated than areas with non-working poor individuals. The areas with high worker poverty not identified in the overall poverty map are Linda Vista, the UCSD area, Pacific Beach, Ocean Beach, Mission Beach, and Imperial Beach.

The place of work trip destination represents the other half of the information required to determine the travel needs of individuals with limited incomes for their journey-to-work trip. The map of jobs densities for individuals in poverty is included in a map in Appendix M. The heaviest concentrations of jobs for poor individuals are located in Downtown San Diego, Mission Valley, the UCSD University area, the SDSU College Area, La Mesa, La Jolla, the Blue Line trolley corridor in National City and parts of Chula Vista, the 4th/5th/6th Avenue corridors extending from Downtown San Diego to Hillcrest, Kearny Mesa, Pacific Beach, Central Escondido, San Marcos, and Oceanside.

[1] The Federal Transit Administration specifies that "funds from the JARC program are available for capital, planning and operating expenses that support the development and maintenance of transportation services designed to transport low-income individuals to and from jobs and activities related to their employment and to support reverse commute projects (FTA C 9050.1).

5.7 Demographic Analysis - Individuals with Disabilities

There are almost 800,000 persons with disabilities in San Diego County according to the most recent 2000 Census estimates. There is a close correlation between the residential location of persons with disabilities and persons of limited means. The likely reason for this is that many people with disabilities also have lower incomes. Fortunately many of these housing areas also have good local transit service and access to complementary ADA service. Based on this assessment the areas with the highest concentrations of individuals with disabilities are the Mid-City communities of San Diego and City Heights, as well as parts Vista, Escondido, El Cajon, Linda Vista, and along the trolley corridor in National City and Chula Vista. See Appendix M for a map illustrating the overall population density for individuals with disabilities in San Diego County.

5.8 Mobility Assessment – Individuals with Disabilities

A mobility assessment was also prepared for individuals with disabilities based on CTPP data. The Federal New Freedom program makes funding available for the transportation needs of persons with disabilities, regardless of trip purpose. The assessment of the work trip for persons with disabilities provides an additional layer of data to assess the transportation needs of the disabled community. See Appendix M for a map illustrating the place of residence for about 180,000 workers in San Diego County who have disabilities. Based on this assessment, the areas with the highest concentrations of workers with disabilities includes the areas identified in the overall disabled map in addition to the areas of Mira Mesa, Pacific Beach, Imperial Beach, Fallbrook, and Northeast Oceanside.

The place of employment data was also available and revealed the workplace destination for these individuals. The largest workplace concentrations for individuals with disabilities generally mirror the job locations of the general population with most of the region's jobs located within the urban areas of the region such as Downtown San Diego, Kearny Mesa, Mission Valley, Downtown Escondido, and Oceanside (see map in Appendix M).

5.9 Demographic Analysis – Older Adults

The aging population in San Diego County is projected to significantly increase in the near future as the baby boomer generation ages. It is projected that by Year 2030 there will be a 125 percent increase in persons ages 65 to 84, while persons age 85+ will experience roughly the same increase. Two maps in Appendix M illustrate population densities of both of these age groups (65+ and 85+) based on Census 2000 data. Census 2000 data was used since it is the most recent population data available for this subgroup. Based on an evaluation of these figures, senior concentrations in the 65+ age category are currently highest in western Chula Vista, National City, Hillcrest, City Heights, Coronado, La Mesa, El Cajon, Linda Vista, Point Loma, La Jolla, Mira Mesa, Rancho Bernardo, Escondido, and Oceanside. For those age 85+, population densities are currently highest in El Cajon, Hillcrest, La Jolla, Rancho Bernardo, Escondido, Vista, and Oceanside.

5.10 Mobility Assessment – Older Adults

Most seniors do not need to travel to work as part of their daily routine; however, seniors do have a need for basic mobility including access to services both within and beyond their communities. Due to the expected increase in the older adult population over the next several years, there will be an increased demand for transit and paratransit services for these individuals. Many of these individuals will rely on dependable public transportation and social service transportation to complete necessary errands, get to medical appointments and to take discretionary trips such as visiting friends and family.

Access to routine care and preventative medical services (otherwise known as non-emergency medical transportation) is one of the most important needs among seniors. Seniors are a transportation disadvantaged group and isolation can bring about significant social and medical problems. Recent research conducted by the Transit Cooperative Research Program (TCRP)[2] has concluded that approximately 3.6 million Americans miss or delay non-emergency medical care each year due to transportation difficulties and a disproportionate number of these individuals are seniors. However, the TCRP found that transportation is relatively inexpensive compared with the high and rapidly growing cost of healthcare. More importantly, the study found that of the 12 common, but serious medical conditions analyzed, providing preventable care was cost effective for all 12 conditions. In four of the conditions (Heart Disease, Diabetes, Prenatal Care, and Asthma) actual cost savings (medical care plus transportation) were achieved by improving transportation access to medical care. This means that additional investment in transportation for non-emergency medical care leads to a net decrease in total costs to the taxpayer when both transportation and healthcare costs are included.

It also is expected that more and more seniors will decide to continue to live in their single family suburban residence for as long as possible. This trend will create a strain on current Paratransit and human service transportation operations. With limited public transit and human services transportation infrastructure to serve these individuals, senior isolation and withdrawal may occur after they lose their ability to drive. The related consequences of a loss in mobility for seniors are a loss in independence, a dependence on others, decrease in life satisfaction, increased depression, and (as noted above) increased medical costs. Compounding the need for public transit and human service transportation for older adults will be the anticipated growth in these population groups as the baby boomers age and move into retirement.

[2] "Research Results Digest 75: Cost Benefit Analysis of Providing Non-Emergency Medical Transportation," Transit Cooperative Research Program (TCRP), January 2006.

CHAPTER 6

TRANSPORTATION INVENTORY

6 Transportation Inventory

The following chapter provides an inventory of the public transportation services available in the San Diego region. A comprehensive list of social service transportation providers primarily serving disabled, elderly, and/or low-income populations is included in this chapter. This inventory includes information about private transportation providers that was collected for the 2007-2011 Coordinated Plan. In that plan, information regarding transportation provided by social service agencies was taken from another study done by SANDAG, the 2006 Social Service Transportation inventory. This year, SANDAG took on an additional effort to update the social service transportation information through a phone survey. Information in this Chapter reflects this updated social service transportation information. In addition, to recognize the vital connection served by San Diego County in promoting interregional transportation, services to and from the surrounding areas in Riverside County, Orange County, Imperial County, and Mexico also have been included in this inventory.

6.1 Public Transportation Providers

Public transit service in the San Diego region is provided by two agencies, the Metropolitan Transit System (MTS) and the North County Transit District (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, Coronado Ferry service, general demand responsive operators, and Americans with Disabilities Act (ADA) paratransit operators. These operators provide service in SANDAG'S 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.

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 are also 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 507 buses. In comparison, the combined transit fleets of San Diego Transit, MTS Contract Services, Chula Vista Transit, and North County Transit District 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 23,000 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 (IEP). SDCS 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 a 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 2.5 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.

Figure 6.1 summarizes the SDCS system ridership by program while Figure 6.2 shows the percentage of the transportation budget allocated to each program. Special education provides a larger share of the transportation budget than the number of students carried by the program would suggest. This is because special education students are offered more door-to-door transportation, and often take a considerably longer amount of time to load and unload in the bus. The transportation budget is allocated by the time required rather than by child, to account for the differences in the two types of service offered.

Figure 6.1: San Diego City Schools System Ridership by Program

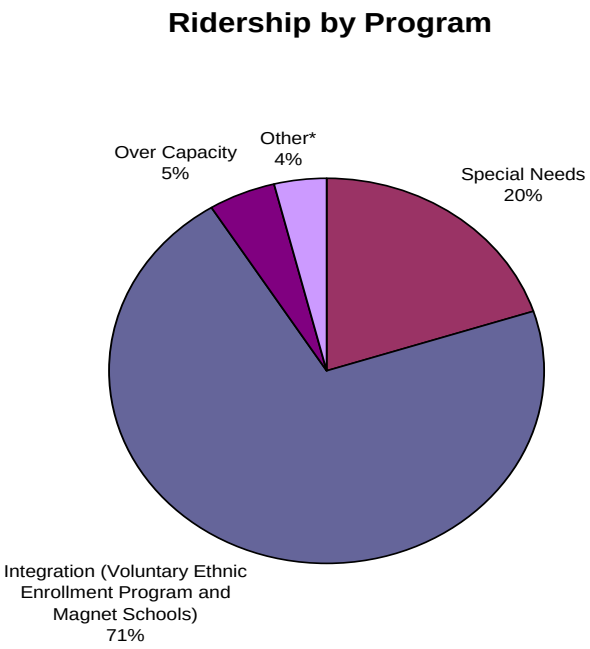
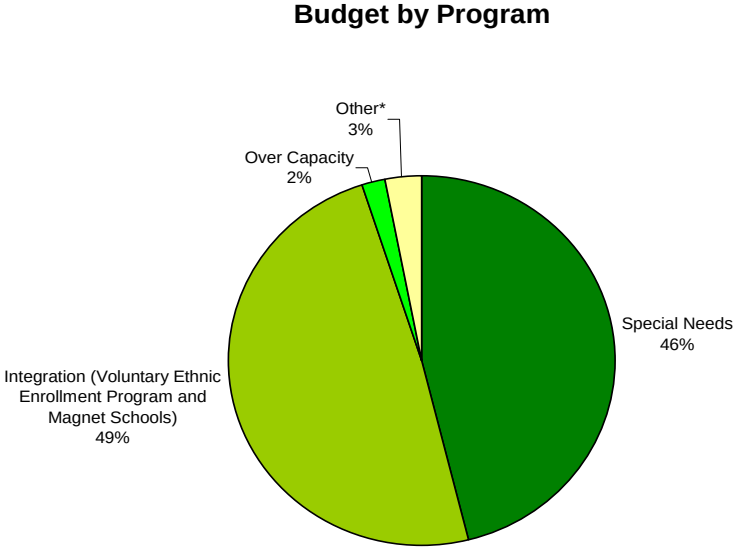


Figure 6.2: Percentage of the Transportation Budget Allocated to Each Program



* "Other" includes No Child Left Behind, homeless student transportation, and others.

UCSD Shuttles

University of California San Diego (UCSD) operates an extensive network of eleven 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 USCD 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
    - Medical Center Connector Shuttle
    - Mesa Housing Shuttle
    - 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, and 921) and the two routes that serve the UCSD medical center in Hillcrest (Routes 3 and 10). UCSD passengers may board NCTD Route 101 free anywhere along the route between Oceanside and UTC. The Map in Figure 6.3 shows these routes.

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 6:45 a.m. to 9:00 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 is also available from 11:30 a.m. to 1:30 p.m.

Figure 6.3: Free-Fare Routes for UCSD Students, Faculty, and Staff

6.2 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.

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 $30. 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, Horton Plaza, Coronado Island, Seaport Village, 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 $8 and a typical scheduled travel time of 50 minutes. Escondido to San Diego is offered four times daily, with an adult cash fare of $12.50 and a travel time of 40 minutes. El Cajon to San Diego is offered three times daily, with an adult cash fare of $10 and a travel time of 30 minutes. San Ysidro to San Diego is offered 17 times daily, with an adult cash fare of $10 and a travel time of 25 minutes. In the past NCTD and Greyhound had a joint ticketing scheme that allowed Greyhound passengers to ride on NCTD between Escondido and Oceanside.

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 60 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 Saturday and Sunday only. Passengers must be eighteen 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 only that services the Los Angeles and Laguna Woods areas. The fare to board those shuttles is also $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 44 daily shuttles that service El Cajon, Mira Mesa, Kearny Mesa, and Santee. These shuttles operate from 5:15 a.m. until 1:30 a.m. the following day. The fare to board is $10 and passengers must be 18 years or older to ride. If passengers have a V Club card, the fare is free.

While these casino shuttles do offer supplemental transit service to the existing MTS and NCTD routes, it should be noted that during the Unmet Transit Needs Hearings in 2005, the management of Harrah's Casino in North County made a presentation on the unmet transit needs of their employees. The Casino noted that the current service provided by NCTD was inadequate and they asked for improved service to bring employees to their worksite at the casino.

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. 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.

PAL

The Palomar Limousine Company operates a shuttle service during the summer tourist season to transport passengers from rail stations at Poinsettia, Oceanside, and Downtown Carlsbad to Legoland. The service has a limited schedule, but fills a missing gap in the NCTD route network.

Airport Shuttles

Frequent shuttle service between Downtown San Diego, the Santa Fe 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 is also 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 $5 one-way or $8 round trip. All buses are wheelchair lift equipped.

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

Private Paratransit Service Providers

California Paratransit Services
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.

Golden State Paratransit
This agency provides direct transportation services to all San Diego County residents, 24 hours per day. The service charges a fee of $3.50 per mile and travels up to 250 miles. Vehicles are ADA accessible.

Hospital Shuttles

A number of agencies provide transportation to hospitals in the San Diego region. The hospitals may fulfill the demand themselves, providing 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 has also facilitated this demand. The following is a limited list of medical-related transportation providers in the San Diego Region:

- American Medical Response
- Angel Flight
- Balboa Ambulance
- Care-A-Van
- Care Medical
- Critical Air Medicine
- East County Fire Department
- Laidlaw
- No Vacancy
- Pacific Ambulance
- Rainbow Medical Transport Services
- San Diego Medical Services
- Schaeffer Ambulance
- SoCal Medical

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

6.3 Social Service Transportation Providers

Several social service agencies provide transportation in San Diego County, effectively expanding the MTS and NCTD paratransit services. In December 2007, SANDAG conducted a phone survey to update the inventory of available services. Two hundred and eight agencies were surveyed, taken from SANDAG's 2006 inventory and the Consolidated Transportation Services Agency's (CTSA) STRIDE Web site. Of the 208 agencies that were contacted, 97 responded, 56 of which are transportation providers. Through 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.

SANDAG used the results of the survey to determine where social service agency transportation was available in San Diego County. To do this, SANDAG asked each agency surveyed to describe their service area. The most common responses were based on city boundaries, zip codes, or within a certain radius of an area. SANDAG then used this information to map where service is available for each population group. This information is included in a series of maps in Appendix N.

Social Service Transportation Options - Seniors

Of the 56 agencies that responded, 40 provide transportation services for seniors. There is significant coverage throughout most of the urbanized areas of the County with the highest levels of service available along the Interstate 78 corridor in North County and the Interstate 8 corridor in Central and East County. Significantly, less transportation services are available for seniors on weeknights; however, a moderate amount of service is available on the weekends.

SANDAG also asked survey respondents whether their transportation services were available only to agency clients, and if so, were there any requirements to becoming a client. For those agencies reporting that their transportation services were not only available to agency clients, or those with no barriers or requirements to becoming a client, their coverage area was included in a set of additional maps titled "Non-Agency Clients." These maps represent the services that are available to the general public. For the senior population, the services available to non-agency clients was approximately the same for weeknights, however, a rather dramatic decrease was apparent for the weekdays and weekends, particularly in North County.

Volunteer Driver Program and Coalition

There are a number of volunteer driver programs in the San Diego area. Full Access to Coordinated Transportation (FACT) has been working with many of them to create a volunteer driver coalition, with a goal of the coalition applying for senior mini-grants that will be made available through the *TransNet* Program in 2009. Agencies that have expressed interest in joining together in a coalition are Jewish Family Service – Rides & Smiles, City of Vista – Out and About, Peninsula Sheppard Senior Center, City of Oceanside, City of La Mesa, Del Mar Community Connections, Encinitas Senior Center, and Zip Trip in El Cajon. Volunteer driver programs provide door-to-door transportation to a large number of seniors living within the service boundaries of these agencies.

The coalition has been meeting since January 2007, and is in the process of developing the guidelines for members of the coalition and standardizing rider application and data collection among the agencies. By coming together and gathering the same data the coalition will be able to demonstrate the true impact these agencies have on the seniors in San Diego.

Social Service Transportation Options - Persons with Disabilities

Of the 56 agencies that responded, 26 provided transportation services for persons with disabilities. The maps representing transportation services available to persons with disabilities reveal less services available than those for seniors. The highest level of service available is along the Interstate 78 corridor in North County. There is significantly less service available on weekends and no service available in North County on weeknights.

When examining the transportation services available to non-agency clients, there is no service available on weekdays, weeknights, or weekends in North County. There is, however, a limited amount of service available to the general public in some areas of the central, southern, and eastern areas of the County.

Social Service Transportation Options - Persons with Low-Incomes

Of the 56 agencies that responded, 31 provided transportation services for persons with low incomes. This population had the highest level of service available during the weekdays, with the most significant concentrations in the central and southern areas of the County. There was less service available during the weekends, with none in North County. There were no agencies that reported providing transportation for low-income individuals during weeknights; therefore, no map was included. Finally, for non-agency clients, there was still service available on the weekdays and weekends, mostly in the central, southern, and eastern areas of the County.

6.4 Vanpool 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.

RideLink

RideLink 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.

RideLink's vanpool program utilizes the Congestion Mitigation and Air Quality (CMAQ) Improvement Program and the San Diego County Air Pollution Control District (APCD) 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 is typically included in the lease cost, while vanpool users pay for gas and the remainder of the van lease not covered by the subsidy.

RideLink'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. RideLink 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.

6.5 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

The Orange County Transportation Authority (OCTA) is a multi-modal transportation agency serving Orange County. The Orange County Transportation Authority 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.

OCTA recently prepared a 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 Interstate 5 (I-5), Interstate 405 (I-405), State Route 91 (SR-91), and State Route 57 (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. Inter-agency transfers from OCTA to BREEZE buses are available upon request.

Riverside Transit Agency

The Riverside Transit Agency (RTA) is the Consolidated Transportation Service Agency 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 (IVT) 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 (IVAG).

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 State Route 11 will connect the new border crossing to State Routes 905 and 125. In Mexico, the Tijuana-Rosarito 2000 Corridor will connect to the East Otay future Port of Entry (POE).

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.

Rail is another key component to the binational transportation system. Re-opening the (San Diego and Arizona Eastern Railway (SD&AE) Railway is proposed to improve the movement of goods through the Southern California/Baja California region. Existing freight service between San Diego and Tecate can be extended to the Imperial Valley by rehabilitating the Desert Line section of the SD&AE. Another rail improvement under consideration is a new rail line between Ensenada and Tecate that will connect to the SD&AE.

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.

6.6 Interregional Systems

Amtrak

Amtrak's 351-mile Pacific Surfliner Corridor serves more than 2.5 million intercity passengers each year. Together with more than 6 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 occurs 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 seven days per week, eleven times per day. Most service is between San Diego and Los Angeles; two 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 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 Santa Fe, 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 Santa Fe Station. The program was eliminated on July 1, 2008, due to budget constraints.

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 that transfer agreement is only valid one-way. Metrolink tickets may now be purchased at the Santa Fe Station in San Diego, although the service is only available at Oceanside.

CHAPTER 7

NEEDS ASSESSMENT

7 Needs Assessment

The needs assessment includes the identification of existing transit service gaps as well as the identification of unmet public and social service transportation needs. Existing gaps and transportation needs included in this chapter were identified though detailed demographic analysis and the various public outreach efforts described in Chapters 2 and 5.

7.1 Outreach Efforts - Summary of Transportation Needs

A number of transportation needs were identified through the outreach programs conducted for the 2007 and 2008 Coordinated Plans. Transportation needs were organized into the following categories and subcategories for the 2007 plan while the update of the plan focused on the prioritization of strategies included in Chapter 8. Detailed needs included in each specific category are listed in Appendix A.

- Public Transit Service Needs
  - Fixed-route
  - Commuter Services
  - ADA Paratransit Services
  - Passenger Amenities
  - Other
- Supplemental Transportation Program (STP) Needs
- Public Information About Transportation Services
- Safety
- Accessibility
- Coordination
- Trip Needs
- Other

7.2 Demographic Analysis - Transit Service Gaps

In addition to the concerns identified in the public outreach process, demographic, transit, and social service transportation data also was utilized to identify service deficiencies and gaps. The Coordinated Plan also incorporates the analysis of service gaps from the evaluation of the transportation system using the complete range of objectives and indicators provided in Chapter 4.

Transit service walking distance buffers were developed in the 2007 plan to determine areas with larger population densities that fell outside of the area covered by public transit. Quarter-mile walking distance buffers were based on the guidelines presented in Chapter 4[1] to evaluate the walking distance performance measures. Areas outside of the quarter-mile transit buffer were cross-referenced with aerial photographs to ensure that they were at least representative of the densities included in the entire Census Block Group. Areas found to be less dense were not included in the needs assessment. The analysis and presentation of the transit service gaps based on the mapping exercise is organized by City, Community Planning Area, or other specific geographies. In addition,

[1] The quarter-mile walking distance buffer was developed based on a correlation between walking distances and transit use that is used to evaluate transit service access as part of the performance measurement process.

these areas are also categorized by regional geographic location (urban, suburban, or rural) based on the evaluation structure identified in Chapter 4 and the expectation that these areas should have different levels of transit service. For example, it would be expected to have frequent, high quality transit service in the urban core, whereas, this type of service would not be expected in the rural or suburban areas.

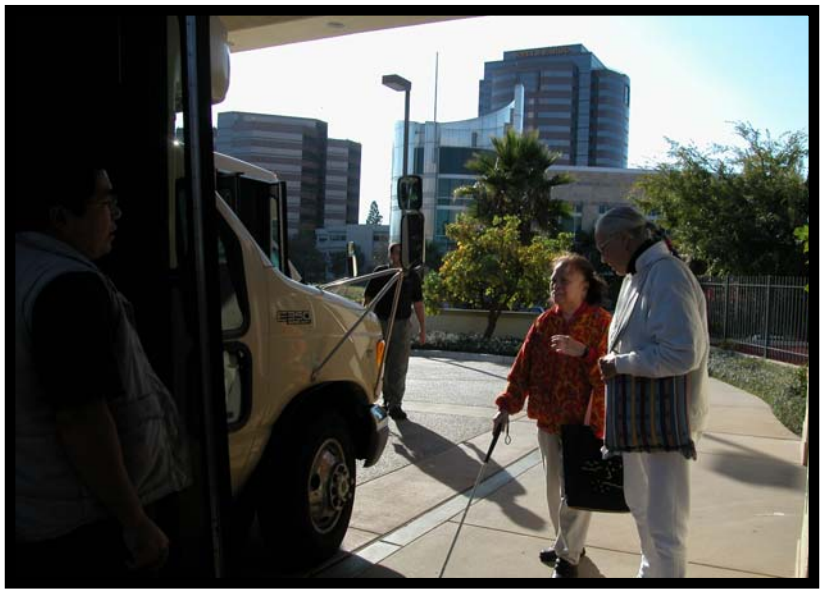
The population groups chosen for the transit gap analysis are consistent with the other groups described in this plan, which are:

1. General Population
2. Individuals with Limited Means
3. People with Disabilities
4. Older Adults

Detailed maps illustrating transit service gaps have been included in Appendix O for each of the population groups discussed. In addition, Appendix O includes the areas, communities, or neighborhoods where service gaps were found. The service gaps in social service transportation[2] are based on the expanded social service transportation assessment and survey. These gaps pertain to each of the above population groups with the exception of the "General Population" group. This category was not included in the inventory since it was only conducted for groups eligible to receive money under the federal programs associated with the Coordinated Plan (those serving low-income, disabled and seniors populations). The social service coverage maps are included in Appendix N.

[2] Gaps in social service transportation were based on areas with significant populations having limited or no social service transportation provided without significant barriers to receive service (such as requirements to be a member or "agency client" of that organization, etc.).

CHAPTER 8



STRATEGIES AND PROJECT PRIORITIZATION

8 Strategies and Project Prioritization

This section of the Coordinated Plan identifies strategies designed to address the deficiencies and gaps in transportation services and to identify potentially redundant, under utilized, or duplicative services. The strategies included in this section were developed to respond to the needs identified as a result of various outreach efforts, demographic research, and transit/social service transportation analysis.

8.1 Coordination – Basic Concepts

The coordination of public transit and human service transportation is a central theme of this plan, but also can be considered a strategy to eliminate gaps in service, to remove real or perceived barriers to transportation, and to improve inefficiencies in existing and future service. Coordination has been touted as a way to improve transportation service delivery for almost 50 years with interest in coordination coming from multiple levels of government and from various transportation providers and agencies.

Simply put, coordination is a path towards the effective management of limited resources requiring organizations to work together. In practice, coordination means doing more with less and becoming more efficient in the process. It also means allocating resources to maximize passenger benefits and has been called "the best way to stretch scarce resources and improve mobility for everyone" (Ohio Department of Transportation, 1997).

While coordination should not be seen as the solution to solve all human service and public transit needs, it is a necessary and important tool to help deliver an efficient and comprehensive regional transportation system. Table 8.1 illustrates some of the potential benefits of having a coordinated transportation system including the associated level of expected improvement or change.

Table 8.1: Potential Benefits of Coordinated Transportation System

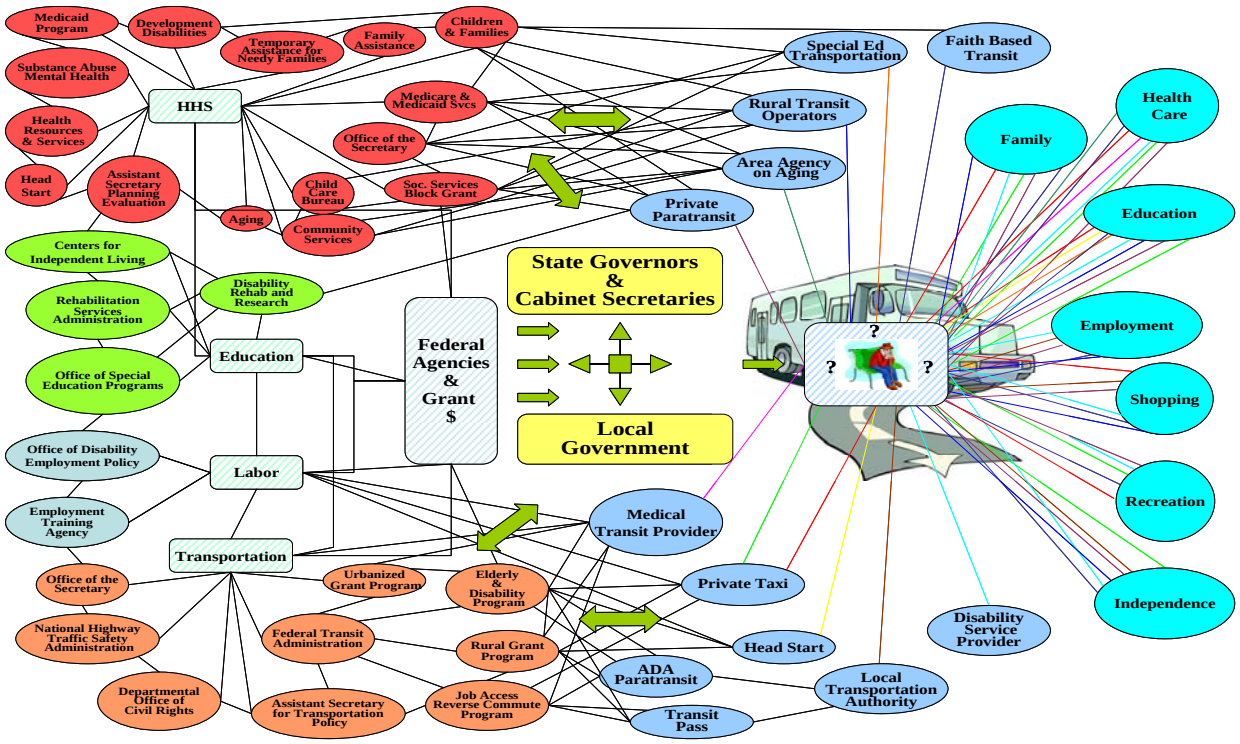
System Characteristics	Desired or Expected Change from Coordination
Number of transportation providers	Lower
Number of agencies purchasing transportation	Higher
Number of Vehicles	Lower
Number of Drivers	Lower
Part-time/full-time driver ratio	Lower
Average Hourly Driver Pay	Higher
Total Driver Wages	Lower
Level and Quality of Driver Training	Higher
Hours When Service is Provided Each Day	Expanded
Days When Service is Provided Each Week	Expanded
Vehicle Hours of Service	Maybe Lower
Vehicle Miles of Service	Maybe Lower
Total Service Area	Expanded
Number of Persons Who Can Get Services	Expanded
Joint Purchasing	More Frequent
Joint Dispatching of Agency Owned Vehicles	More Frequent
Centralized Oversight and Management	More Frequent
Level of Route Duplication	Lower
Number of Funding Sources	Higher
Total Transportation Funding	Higher
One Central Community Information Source	More Frequent
Segregated Client Types	Less Frequent
Limited Trip Purposes	Less Frequent
Community-wide Transportation Perspective	More Frequent
Time Spent in Meetings	Higher
Level of Planning Process	Higher

SOURCE: Adaptation from "TCRP Report 91 – Economic Benefits of Coordinating Human Service Transportation and Transit Service," Transit Cooperative Research Program, 2003

Scheduling Made Easy

Beyond the overall benefits of coordinating transportation, a well coordinated system can, and should, simplify the experience for the rider in finding a ride and getting to his or her destination. Generally speaking, the human service transportation system typically involves a confusing array of programs and agencies at various levels of government (see Figure 8.1).

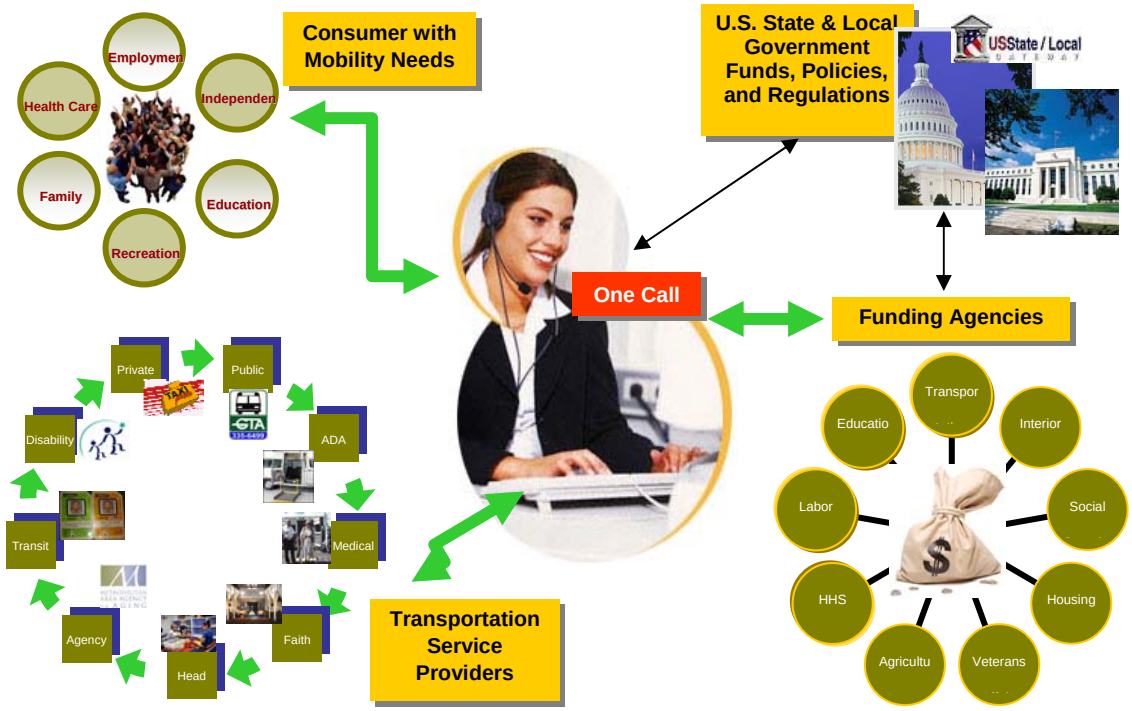
Figure 8.1: Finding a Ride – Current Challenges



United We Ride, 2007

Navigating the cumbersome bureaucratic maze illustrated in Figure 8.1, raises the question, "What can be done to make the process simpler?" Figure 8.2 illustrates one potential regional answer to this question using a coordinated approach. This approach is based on a single call center concept where the traveler is not required to know all of the various interlocking governmental channels in accessing a ride. He or she simply calls the designated number and schedules the desired ride. Other models also may be developed to more effectively communicate the availability of rides. For example, some programs may choose to involve the use of the Internet where individuals can book their trip online.

Figure 8.2: Scheduling A Ride – A Coordinated Vision



United We Ride, 2007

Issues and Strategies

Within the context of a coordinated approach, the other identified transportation issues have been identified along with possible strategies to address these issues. These issues and corresponding affected population group(s) are included in the Appendix P to further define the need, refine the possible solutions, and identify potential funding sources that would adequately address the issue. Areas with identified gaps in transportation options were identified through the demographic, socio-economic, survey and outreach efforts associated with this plan. In addition, public comments have been noted as they apply to specific transportation gaps. This section also identifies specific issues affecting Supplemental Transportation Programs (STPs) which involve those services provided by social service and human service agencies also providing transportation. The identified issues involving STPs include sample strategies and the corresponding affected population group(s). Creative and cost effective solutions have been emphasized in order to expand the possibilities in developing an effective and efficient coordinated public transit and human services transportation system in the San Diego region.

8.2 Coordination of Transportation Resources

Many providers of transportation operate with local, state, or federal funding. The funding is generally specific to eligibility of person and purpose of the trip, with no real incentive to coordinate transportation, while school districts and agencies providing transportation focus primarily on providing transportation for their specific customers. There also exists a reluctance to coordinate transportation services because of perceived risk, liability, and funding restrictions. The following areas were identified as areas which can be improved or coordinated to improve efficiency and service delivery:

- 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 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.

Areas of duplication present opportunities to develop strategies to work with transportation providers to collaborate and coordinate transportation resources.

8.3 Benefits of Coordination

Coordination of transportation resources can create efficiencies that reduce overall costs and expand the array of services, which can be provided. The benefits of coordinated human services and 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
- 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
- Easy to Use System: Coordinated services are better publicized, reliable, and accessible for users with the potential of serving more destinations

8.4 Existing Programs

Full Access & Coordinated Transportation, Inc. (FACT) is a nonprofit agency in San Diego County that was designed to bring full mobility to individuals within their community through an accessible transportation system that meets their individual need. Due to the size of San Diego County and because NCTD was a major supporter of FACT, it was decided that a pilot project would be the most prudent way to bring a coordinated transportation system to the County.

The area selected for the North County Pilot Project (NCPP) consists of six cities covering a total of 1,100 square miles. Public transportation in this area is provided by NCTD. The total population of the NCPP area is 890,000. This area contains several hospitals and medical centers, a state university, several large shopping centers, and many businesses and recreational areas.

The concept behind a pilot project is for FACT to identify the barriers and develop the techniques and resources necessary to create a coordinated transportation system in an area smaller than the entire County. The goal of the NCPP is to create the systems and solve the problems in a confined area and then introduce the solutions to the entire County in a step-wise fashion. FACT is committed to creating a system that works and truly serves the people in need of transportation. The lessons learned during the NCPP will be invaluable to the organized spread of coordinated transportation.

Work has begun on the NCPP. Representatives from the cities of Carlsbad, Oceanside, Vista, and San Marcos as well as from the Oceanside Senior Citizens Association, Inc. (who operate the Oceanside Nutrition Program), and Redwood Elderlink (who provide senior transportation for the City of Escondido) have stepped forward to begin the process of coordination in the North County area. The group is developing plans for an operational pilot project that will provide rides for seniors and perhaps other individuals living in the North County area. The impetus for this group was a ruling by the California Department of Aging stating that vehicles used to transport seniors to the Senior Nutrition Programs, could be used within a coordinated transportation system. Current work includes identifying the decision-maker and decision-making process in each city and/or organization and determining the true cost of transportation for rides that will be offered to others who will eventually use the system. FACT staff does continual outreach to the public and many different agencies to teach them about the benefits of coordination and solicit them to participate in creating the new coordinated transportation system.

Volunteer Driver Programs

As mentioned in Chapter 6, there are a number of volunteer driver programs in the San Diego region and interest in these programs has continued to increase over the past several years. This interest and level of activity has led to the recent development of a volunteer driver coalition.

Volunteer driver programs are an excellent way to increase the number of transportation services available to the public. In addition, the development of a coalition helps to enhance coordinated transportation services throughout San Diego County.

Coordinated Training

Organized training sessions are an ideal way to coordinate transportation agency activities and to maximize resources. On March 27, 2007, a CTSA training was attended by 24 representatives from transportation agencies and programs around the County. The California Highway Patrol provided a two hour training on Pre-Trip Inspections and Driver Safety. The summer of 2007 training schedule will focus on Compliance with Controlled Substances and Alcohol Testing Requirements.

8.5 Project Prioritization

Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEALU) now requires that the prioritization of projects and strategies be included in the Coordinated Plan in order for SANDAG to distribute federal funding through the Jobs Access & Reverse Commute (JARC) and New Freedom (NF) programs. As described in Chapters 2 and 6, SANDAG conducted an expansive public outreach program to solicit project priorities from a wide variety of interested parties including members of the public, stakeholders, and social service agencies. These priorities were then included with the comprehensive empirical data analysis gathered via surveys and developed through the use of sophisticated geographic mapping techniques. The results are included below and have been organized according to strategies that meet the needs of each population group identified in the plan. In addition, priority levels have been set at four distinct levels:

1. Very High Priorities
2. High Priorities
3. Mid Priorities
4. Low Priorities

These priorities will assist SANDAG in its effort to distribute funding related to the Coordinated Plan in the most equitable manner possible. The priority tables for the three population groups are included in Tables 8.2 through 8.4 as follows:

Table 8.2: Prioritized Strategies - Low-Income Individuals and Reverse Commuters

Priority	Strategy
Very High	Develop or expand transit and non-agency client transportation services in areas with little or no other transportation options based on identified gaps in transportation services included in Chapters 6 and 7
Very High	Develop or expand transportation solutions in areas with sufficient densities to support shared ride or coordinated services based on identified gaps in transportation services included in Chapters 6 and 7
High	Development of centralized ride scheduling, dispatching, and mobility center
High	Improve transportation services to the rural 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 work-based weekday and weekend service based on identified gaps in service included in Chapters 6 and 7
High	Increase work-based weeknight service based on identified gaps in service included in Chapters 6 and 7
High	Provide travel training to encourage more individuals to ride regular transit
High	Develop or enhance volunteer driver programs
High	Upgrade bus stops to include weather protection
Mid	Expand public information regarding alternative transportation programs
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	Support coalitions of similar programs such as the development of a volunteer driver program coalition
Low	Community outreach and marketing of services
Low	Create feeder to fixed-route service
Low	Develop non-motorized 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 bus public address (PA) 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 officer patrol in transit stations with known criminal activity
Low	Increase SPRINTER service, including weekend and late evening service
Low	Increase the marketing of transportation travel options
Low	Increase weekend hours for fixed-route services
Low	Install and maintain transit station amenities (shelters, seating, trash cans, and lighting)

Table 8.2: Prioritized Strategies - Low-Income Individuals and Reverse Commuters (Cont'd)

Priority	Strategy
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 commuter services from Southern Riverside County
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

Table 8.3: Prioritized 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 based on identified gaps in transportation services included in Chapters 6 and 7
Very High	Develop or expand transportation solutions in areas with sufficient densities to support shared-ride or coordinated services based on identified gaps in transportation services included in Chapters 6 and 7
High	Develop or expand transportation solutions for developmentally disabled individuals based on identified gaps in service included in Chapters 6 and 7
High	Development of centralized ride scheduling, dispatching, and mobility center
High	Improve transportation services to the rural 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 service based on identified gaps included in Chapters 6 and 7
High	Increase weeknight and weekend service based on identified gaps in service included in Chapters 6 and 7
High	Provide door-to-door service (and door-through-door when necessary) for trips such as low-cost non-emergency medical transportation and grocery shopping in areas without paratransit
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 - Retrofitting of existing bus stops to ensure accessibility and ADA compliance
High	Develop or enhance volunteer driver programs
High	Upgrade bus stops to include weather protection
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

Table 8.3: Prioritized Strategies - Individuals With Disabilities (Cont'd)

Priority	Strategy
Mid	Support coalitions of similar programs such as the development of a volunteer driver program coalition
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 3/4 mile boundary
Low	Improve 511 Web site and other transit information sites
Low	Improve accessible travel information and services for visitors and residents
Low	Improve and maintain the STRIDE Web site
Low	Improve bus public address (PA) 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 officer patrol in transit stations with known criminal activity
Low	Increase operating hours of accessible health and human service transportation vehicles
Low	Increase paratransit service hours
Low	Increase SPRINTER service, including weekend and late evening service
Low	Increase the marketing of transportation travel options
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
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 commuter services from southern Riverside County
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	Replace or upgrade older high-floor buses with newer low-floor models
Low	Study impact of further reducing fares for ADA certified on regular transit

Table 8.4: Prioritized Strategies - Seniors

Priority	Strategy
Very High	Develop or expand transit and non-agency client transportation services in areas with little or no other transportation options based on identified gaps in transportation services included in Chapters 6 and 7
Very High	Develop or expand transportation solutions in areas with sufficient densities to support shared ride or coordinated services based on identified gaps in transportation services included in Chapters 6 and 7
High	Development of centralized ride scheduling, dispatching, and mobility center
High	Improve transportation services to the rural 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 Chapters 6 and 7
High	Provide door-to-door service (and door-through-door when necessary) for trips such as low-cost non-emergency medical transportation and grocery shopping in areas without paratransit
High	Provide travel training to encourage more individuals to ride regular transit
High	Develop or enhance volunteer driver programs
High	Upgrade bus stops to include weather protection
Mid	Expand public information regarding alternative transportation programs
Mid	Provide demand responsive transportation for areas not served by fixed-route transit
Mid	Support coalitions of similar programs such as the development of a volunteer driver program coalition
Low	Community outreach and marketing of services
Low	Create feeder to fixed-route service
Low	Enhance driver training program to improve passenger information
Low	Improve 511 Web site and other transit information sites
Low	Improve bus public address (PA) 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 officer patrol in transit stations with known criminal activity
Low	Increase operating hours of accessible health and human service transportation vehicles
Low	Increase SPRINTER service, including weekend and late evening service
Low	Increase the marketing of transportation travel options
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 taxi vouchers
Low	Provide transportation system guides

Table 8.4: Prioritized Strategies - Seniors (Cont'd)

Priority	Strategy
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	Replace or upgrade older high-floor buses with newer low-floor models

CHAPTER 9

FUNDING

9 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.

9.1 Federal

The current reauthorized federal Safe, Accountable, Flexible and Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) legislation continues many of the programs created under the two previous transportation bills (ISTEA and TEA-21). For transit, the Federal Transit Administration (FTA) administers these programs with some programs allocated under formula provisions while others are apportioned on a discretionary basis. The different federal transit funding programs are described below.

FTA Section 5307 (Urbanized Area Formula Program)

The Urbanized Area Formula Program is apportioned annually to the urbanized areas of the state based on a formula consisting of population, population density, and transit revenue miles of service. This program funds capital projects, preventative maintenance, and planning activities. The urbanized area of San Diego County is shown in Figure 9.1. Once a reduction is made for regional planning and the regional vanpool program, the remaining funds are divided between the two transit agencies based on an agreed-upon formula of 30 percent to North County Transit District (NCTD) and 70 percent to the Metropolitan Transit System (MTS). The 5307 funds 80 percent of the cost of capital projects with a minimum requirement of a 20 percent local match. 5307 funding for prior years and projected years are included in Appendix B Table B-9.

FTA Section 5309 (Fixed Guideway/Discretionary)

There are two different programs under FTA Section 5309: fixed guideway (A) and discretionary (B). FTA Section 5309 fixed guideway is a formula program that funds infrastructure improvements to existing rail and other fixed guideway systems including track right-of-way rehabilitation, modernization of stations, rolling stock purchase, and signal/power modernization. The discretionary program is further divided among the New/Small Starts program for major transit capital projects and bus or bus facilities programs, which are apportioned by project on an annual basis.

MTS and NCTD are eligible for all three categories of funding. SANDAG will be pursing new starts and small starts funding for several projects including the proposed Mid Coast trolley line and various Bus Rapid Transit (BRT) projects. Earmarks have been obtained in the past for discretionary funds under FTA Section 5309.

An FTA Section 5309 grant provides a maximum of 80 percent of capital costs and requires a minimum local match of 20 percent. Historically for the two discretionary programs, local share has exceeded the minimum 20 percent of total project cost. Under SAFETEA-LU guidelines, local match money can now include federal sources other than from the FTA. Section 5309 funding for prior and projected years are included in Appendix B, Table B.9.

FTA Section 5311 (Rural and Small Urban Areas)

This section was expanded to include several new programs under SAFETEA-LU and provides capital and operating expenses for rural and small urban public transportation systems and services. These programs are defined below.

- **Rural**

Prior to 2006, the rural area of San Diego County was served by NCTD and the County Transit Service (CTS). All rural monies under Section 5311 went to NCTD during that time. In 2001, the County of San Diego divested itself of CTS and the responsibility was transferred to the Metropolitan Transit Development Board (MTDB) and now MTS. Subsequent state legislation changed the boundary of MTS to include the rural areas previously serviced by CTS. In 2006, MTS began requesting Section 5311 funding and through an agreement between the two transit operators, Section 5311 funds are now divided between NCTD and MTS. Also, the amount of the Section 5311 funding was increased by approximately 50 percent in SAFETEA-LU. The funds may be used for capital or operating costs. Local matches of 20 percent for capital and 50 percent for operations are required. This program is based on statewide appropriations and is administered by Caltrans. In Fiscal Year 2007/2008, NCTD was allocated $689,318 and MTS was allocated $224,355 under this program.

- **Inter-City**

This program funds bus services operating between rural and urban areas or linking rural areas with mainline rail and inter-city bus services. MTS received money from this fund in 2007 in the amount of $400,000. NCTD was allocated $309,000 and MTS was allocated $200,000 in 2008 under this program. The funds may be used for capital or operating costs. Local matches of 20 percent for capital and 50 percent for operating are required. Similar to the rural program, this program is based on statewide appropriations and is administered by Caltrans.

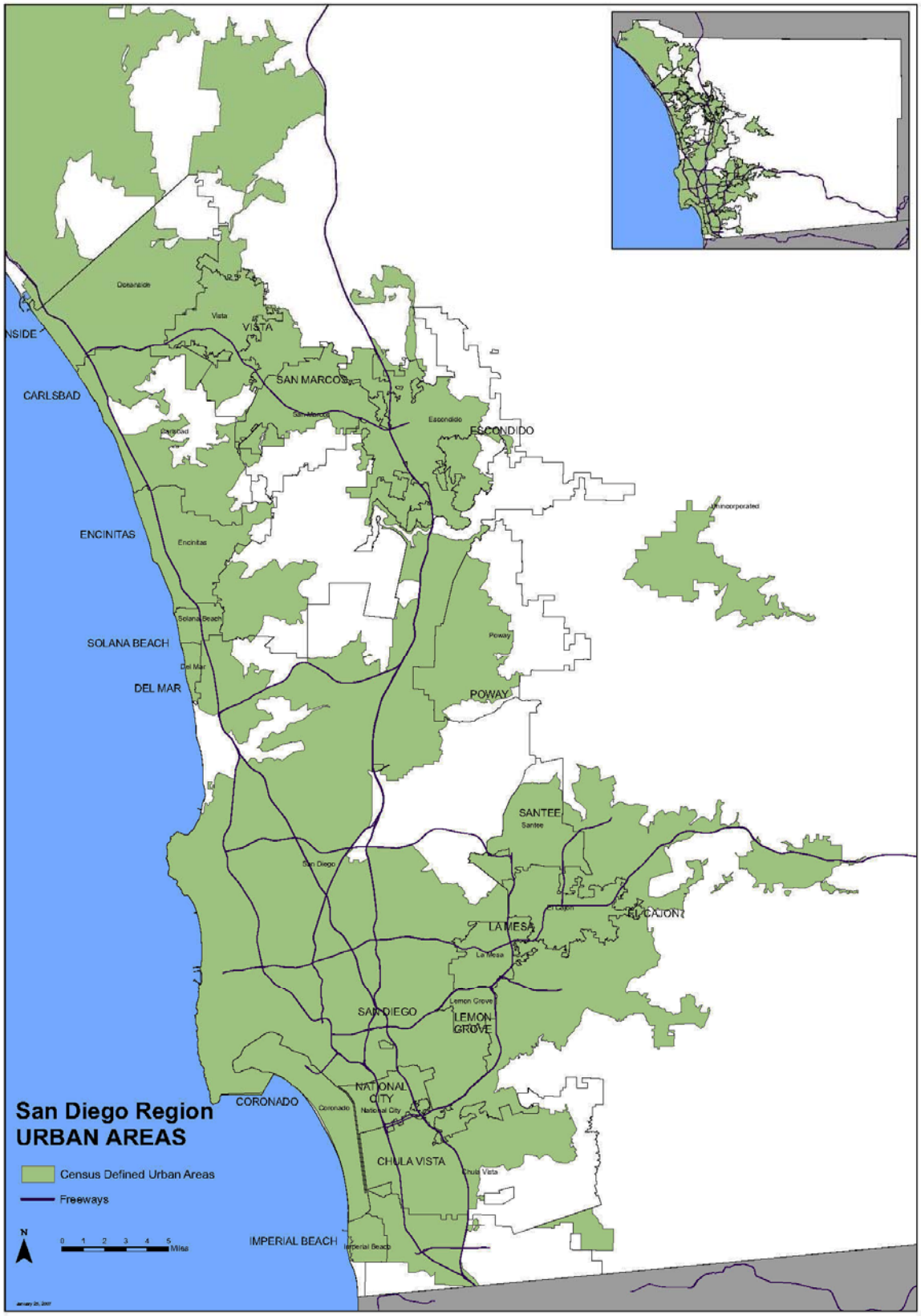
- **Tribal Transit**

This is a nationwide program to fund transit services on Indian reservations or linking reservations to other activity centers. No local match is required and the service must be accessible and open to all users, not just members of Indian tribes. Money may be used for planning, startup, or system enhancements. In 2008, the Reservation Transportation Authority (RTA) was awarded a tribal transit grant for $425,104. The project was based on the Tribal Transit Feasibility Study conducted with the Tribal Transportation Working Group.

FTA Section 5310 (Elderly Persons and Persons with Disabilities)

Funds from Section 5310 are allocated by formula to states for capital costs of providing services to the elderly and disabled. While in some states the program funds operations, only capital projects are eligible in California. SANDAG participates in evaluating local applications for Section 5310 funds. Eligible uses include purchase of vans, radio equipment, dispatch hardware or software, and other related equipment. The program is administered by the state and the funds are allocated annually by the California Transportation Commission. Effective in 2008, in order to be eligible, the project must be included in this Coordinated Plan. The local match requirement is approximately 11 percent.

Figure 9.1: Urbanized Area of San Diego County



FTA Section 5316 (Job Access and Reverse Commute [JARC] Program)

Also known as Job Access and Reverse Commute (JARC), this program was converted from a discretionary fund under TEA-21 to a formula fund under SAFTEA-LU. The fund provides support for capital or operating costs for transportation services and facilities designed to facilitate employment related travel for persons of limited means. The program also is applicable to reverse commute transportation programs or projects. Projects funded in this section must be included in the Coordinated Plan. In San Diego County, the funds for the urbanized area are awarded by SANDAG based on an annual appropriation. The rural portion of the funds are awarded by Caltrans and are based on a statewide appropriation. In the first year of SAFETEA-LU, grants were awarded by SANDAG for three bus services operated by MTS and a bus stop improvement program at NCTD. A local match of 20 percent is required for capital and mobility management projects, with a match of 50 percent required for operations. The funds must be awarded following a competitive process. The allocation of JARC funds through the Coordinated Plan competitive process are shown in Table 9.1 while the specific projects funded are shown in Tables 9.2 and 9.3 for the New Freedom and JARC programs respectively.

Table 9.1: Historic and Estimated Funding Allocations Through the JARC, New Freedom, and Senior Mini-Grant Programs in the San Diego Region

	Details	JARC	New Freedom	Senior Mini-Grant
FY 2006	Available	$1,260,947	$599,342	--
	Awarded	$1,260,947	$259,370	--
	Carry-over	$0	$339,972	--
FY 2007*	Available	$1,329,172	$991,858	--
	Awarded	$1,327,266	$807,613	--
	Carry-over	$1,906	$184,245	--
FY 2008*	Available	$1,441,843	$888,443	--
	Awarded	$1,439,937	$355,380	--
	Remaining	$2,027	$533,063	--
FY 2009**	Available	$1,518,268	$744,438	$1,278,000
	Awarded	$1,314,339	$76,500	--
	Remaining***	$203,929	$667,938	--
FY 2010**	Available	Unknown	Unknown	$1,318,000
	Awarded	--	--	--
	Carry-over	--	--	--
FY 2011**	Available	Unknown	Unknown	$1,366,000
	Awarded	--	--	--
	Carry-over	--	--	--
FY 2012**	Available	Unknown	Unknown	$1,415,000
	Awarded	--	--	--
	Carry-over	--	--	--

* Available amounts for FYs 2007 and 2008 include the apportioned amount and the roll-over from the previous year's unspent allocation.

** Amounts available for FYs 2009 through 2012 are estimates

*** Does not include the contingency award should MTS be unsuccessful in receiving state funds for Route 905.

Table 9.2: New Freedom Programs Funded Through the Coordinated Plan

New Freedom

		Grant Amount Awarded				
Project	**Agency**	**FY06**	**FY07**	**FY08**	**FY09**	**Total**
Volunteer Driver Program	La Mesa	$50,000	$76,500	$76,500	$76,500	$279,500
Mobility/Travel Training Progran	NCTD	$34,412	$44,242	$161,897	$172,433	$412,985
Mobility Management	FACT	$107,007	$557,760	$491,195	$287,521	$1,443,483
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		$88,908
Purchase lift equipped vehicle	All Congregations Together		$64,000			$64,000
Bus Stop Accessibility	NCTD			$70,400	$76,378	
Purchase lift equipped vehicle	SWCCD			$40,000		
Accessible Tourism Transportat	Accessible San Diego				$132,960	
Total		**$259,370**	**$807,613**	**$887,089**	**$745,792**	**$2,699,864**
Apportionment		$665,936	$724,318	$782,442	$827,153	$2,999,849
less 10% Admin		$599,342	$651,886	$704,198	$744,438	$2,699,864
Remaining		**$339,972**	**$184,246**	**$1,354**	**$0**	**$0**

Table 9.3: JARC Programs Funded Through the Coordinated Plan

JARC

		Grant Amount Awarded				
Project	Agency	FY06	FY07	FY08	FY09	**Total**
Route 905	MTS	$433,350	$453,258	$98,396	$450,793	$1,435,797
Route 960	MTS	$83,068	$101,023	$101,401	$101,863	$387,355
Route 30	MTS	$262,037	$370,008	$379,316	$388,633	$1,399,994
HASTOP	MTS				$62,832	$62,832
Bus Stop Improvements	NCTD	$482,492	$246,602	$536,328		$1,265,422
SPRINTER Weekend Service	NCTD		$156,375	$156,375	$156,375	$469,125
Ridelink Bike Lockers	SANDAG			$168,000		$168,000
Total		**$1,260,947**	**$1,327,266**	**$1,439,816**	**$1,160,496**	**$5,188,525**
Apportionment		$1,401,052	$1,476,858	$1,599,930	$1,686,964	$6,164,804
less 10% Admin		$1,260,947	$1,329,172	$1,439,937	$1,518,268	$5,548,324
Difference		**$0**	**$1,906**	**$121**	**$357,772**	**$359,799**

FTA Section 5317 (New Freedom Program)

The New Freedom program is dedicated to supporting transportation operations or capital expenditures. A local match of 20 percent is required for capital and mobility management projects, with a match of 50 percent required for operations. The money must be used to support transportation projects that go above and beyond the requirements of Americans with Disabilities Act (ADA) legislation and regulation. Persons benefiting from these funds are not required to be ADA certified. The funds also must be awarded following a competitive process. The allocation of New Freedom funds through the Coordinated Plan competitive process are shown in Table 9.2.

Congestion Mitigation and Air Quality (CMAQ) Improvement Program

Administered by the Federal Highway Administration (FHWA), these funds are known as 'flexible' funds, which can be used for transit capital projects and for certain operating expenses. The 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 startup service.

However, SAFETEA-LU implementation guidelines no longer allows New Start funded projects this eligibility. 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 been allocated $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.

Surface Transportation Program (STP)

The Surface Transportation Program is primarily designed to support road and highway projects. However, under the flexible funding rules this program can be applied to transit but there may be strong competition for these funds. In Los Angeles County, the Surface Transportation Program funds are traded for FTA Section 5310 operating funds, which are then used to meet some of the costs of providing ADA service.

9.2 State

State funding sources generally include motor fuel taxes, special fuel taxes, vehicle registration fees, and drivers license fees. State funding for transit projects are available through the State Transportation Improvement Program (STIP). In addition to the STIP, the State Transit Assistance (STA) is funded with 50 percent of the Public Transit Account (PTA) revenues, which is principally derived from sales tax on gasoline and diesel. Vehicle registration fee money also is available as a potential funding source according to Assembly Bill 2766. However, the Air Pollution Control District (APCD) has not increased the fee from $2 to $6 which is allowable by law. A future increase could be implemented to provide additional support for public transit.

State Transportation Improvement Program (STIP-RIP/IIP)

The State Transportation Improvement Program (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 California Transportation Commission (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 may only be used for capital and not operating expenses. Although major highway projects have been recipients of STIP funds, regional transit projects such as Mid-Coast and Fare Technology have received funding as well under the RIP component of the STIP. The projects and funding levels which have received RIP and IIP funds are available at www.catc.ca.gov/programs/stip.htm.

State Transit Assistance Program (STA)

The STA program is derived from the Public Transit Account (PTA) and provides for operating and capital funding for transit operators. Half of the funds in the PTA support state programs including the State Transportation Improvement Program (STIP). The remaining PTA balance goes to the STA program. Within STA, 25 percent is allocated to regional entities according to a population formula, and an additional 25 percent is allocated to regional entities to be allocated in turn to individual operators proportionately based on a revenue formula which is proportional to the service area population. The STA also outlines specific requirements and eligibilities that each transit operator must meet in order to receive STA funds. The eligibility requirements are specified in Section 99314.5 of the Sate of California's "Statutes Relating to Programming & Funding of Transportation Projects."

The SANDAG area, as defined under the STA program, consists of the area outside of the MTS area of jurisdiction. For FY 2008, NCTD was the only claimant of STA funds in the SANDAG area. NCTD submitted the claim for capital support, which includes matching funds from SANDAG for the Escondido Maintenance Facility project. SANDAG is implementing this project on behalf of NCTD. For purposes of STA, MTS is designated in statute as a regional entity. As a result, MTS is a direct recipient of these funds and does not require SANDAG approval for its claim or the claims of its transit operators.

In 2006, the voters of California approved a major infrastructure bond program: the Highway Safety, Traffic Reduction, Air Quality, and Port Security Bond Act of 2006 (Proposition 1B). This bond includes additional capital funding via formula for transit agencies. Although the method of allocation is still to be determined by CTC, both NCTD and MTS are expected to receive approximately $218 million through 2012. In the initial two years of this act, the legislature allocated approximately 26.39% of this funding to the transit agencies and has not yet decided on the apportionment timeline of the remaining funds. NCTD plans to use its entire Proposition 1B funding toward completion of the SPRINTER project, while MTS plans to use its funds for several projects identified under the transit Early Action Program (EAP), which also will be partially funded by the local *TransNet* program (see below under Local).

Traffic Congestion Relief Program (TCRP)

In 2000, the Traffic Congestion Relief Program (TCRP) was proposed by the then governor and enacted by the legislature. Out of the nearly $500 million awarded to the San Diego region, $168 million were allocated for various transit projects. The funding levels for each of these projects are included in Table 9.4.

Table 9.4: Traffic Congestion Relief Fund as of 9/30/2008

PROJECT ID	PROJECT TITLE	SOURCE	$ ALLOCATED
NCTD05	Bus/ADA/Revenue Vehicle Purchases & Related Equipment	TCRP	$7,700,000
NCTD16	Oceanside-Escondido Rail Project	TCRP	$80,000,000
SAN26	I-15 BRT Transit Stations Project	TCRP	$5,716,000
CAL18	I-15 Managed Lanes (Middle)	TCRP	$64,300,000
NCTD20	Rail Vehicles & Related Equipment	TCRP	$129,000
SAN23	Mid-Coast Corridor Project	TCRP	$10,000,000
TOTAL			**$167,845,000**

9.3 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.

TransNet and the Senior Mini-Grant Program

In November 1987, (Proposition A) the voters of San Diego approved a half cent increase in sales tax to fund transportation projects over the next 20 years. The sales tax became effective on April 1, 1988, and ended March 31, 2008, generating over $3 billion for regional transportation improvements. In November 2004, the voters of San Diego approved the extension of the same sales tax for transportation through the year 2048. It is anticipated that an additional $14 billion in revenues would be generated for regional transportation improvements.

For the original *TransNet* program, funding was distributed in equal thirds among highway, transit, and local street and road projects. The one-third of *TransNet* sales tax revenues dedicated for transit purposes was allocated by population to MTS and NCTD. By vote of the SANDAG Board of Directors in June 2003, the maximum available for non-rail capital purposes, such as transit operations or bus rapid transit construction (formerly limited to 20 percent of the total transit share of *TransNet* annual revenues) was increased to 40 percent. As a result no less than 60 percent of the annual *TransNet* revenues were to be used for specific rail-related capital improvements.

The *TransNet* extension provides for a different distribution of funds beginning in FY 2009. After deducting costs associated with the administration of the program, the Independent Taxpayer Oversight Committee (ITOC), and the bicycle/pedestrian program, beginning in FY 2009 the *TransNet* program is divided into Major Corridor Projects (42.4 percent), New Bus Rapid Transit/Rail Operations (8.1 percent), Local System Improvements (33 percent), and Transit System Improvements (16.5 percent) from which the transit revenues are derived. Within the transit share, services provided pursuant to ADA and subsidies for seniors have specific earmarks (2.5 percent and 3.25 percent, respectively). The remaining revenues can be used for operating or miscellaneous capital purposes. The *TransNet* ordinance also includes a provision that covers the cost of reducing senior pass to 25 percent of the cost of an adult pass. The ordinance also covers the cost of reducing the youth pass to 50 percent of the cost of an adult pass.

In addition, the *TransNet* extension includes a mini-grant program for specialized senior transportation services. *TransNet* designates 3.25 percent of the total 16.5 percent in annual *TransNet* transit operating and capital funding for the Senior Mini-Grant program. This will yield approximately $1 million when funding becomes available in FY 2009. Funds will be awarded through a competitive grant process. As a regional agency, SANDAG will consider transportation services that address the transportation needs of seniors in all parts of the region for distribution of mini-grant funds. The Senior Mini-Grant program is targeted towards older adults and provides another source of funding for senior transportation programs in addition to the federal Elderly and Persons with Disabilities (Section 5310) and New Freedom (Section 5317) programs.

A Senior Access Task Force convened and came up with multiple recommendations, among which they recommended using *TransNet* program funds to continue the discounted monthly pass for seniors and to establish a mini-grant program to fund senior STPs throughout the region.

STPs are programs offered by nonprofit organizations, health and human service agencies, local jurisdictions, or other small operators that are able to address numerous transportation needs of seniors including ride sharing, quantity and quality of life rides, escorts, flexible schedules, and low-cost fees. Examples of existing STPs include local shuttles, volunteer driver programs, nutrition programs, taxi vouchers, and hospital transportation services.

The *TransNet* Extension ordinance states that the Senior Mini-Grant program funds "shall be used to provide specialized transportation services for seniors focusing on innovative and cost-effective approaches to providing improved senior transportation, including, but not limited to, shared group services, special shuttle services using volunteer forces, and brokerage of multi-jurisdictional transportation services."

With the passage of the *TransNet* Extension Ordinance and Expenditure Plan in November 2004 (Proposition A), it was mandated in the ordinance that an independent Taxpayer Oversight Committee (ITOC) for *TransNet* be formed to provide an enhanced level of accountability for the expenditure of funds under the Expenditure Plan. The members of ITOC reviewed and commented on the initial draft of the evaluation criteria and application form at its July 18, 2007, meeting. The ITOC unanimously supported the concept of merging the *TransNet* Senior Mini-Grant Program with the Federal Transit Administration (FTA) senior transportation-related programs. Merging these programs allows the *TransNet* money to further leverage available federal funding and maximize the amount of senior transportation service that can be provided.

The draft application form and evaluation criteria were reviewed by several stakeholder groups, including the SANDAG Social Services Transportation Advisory Council and a Volunteer Driver Coalition. Based on stakeholder input and the lessons learned from the most recent New Freedom competitive process, staff recommended several changes to the evaluation criteria.

These changes included modifications to the performance indicators for service effectiveness to reflect vehicle capacity and the adoption of a new point score allocation process, similar to what is used to guide the New Freedom funding program. These changes were unanimously recommended by ITOC on January 9, 2008, with the detailed Senior Mini-Grant evaluation criteria included in Appendix Q of this document.

Transportation Development Act (TDA)

The Local Transportation Fund (LTF) as provided in the TDA is the major subsidy source that supports the region's public transit operators and non-motorized transportation projects. The LTF comes from a quarter percent of state sales tax assessed in the region. Among other uses, the LTF is allocated in San Diego County between MTS, CTSA, and NCTD for conventional transit, paratransit, and transportation coordination. SANDAG also receives a portion of this funding to support regional planning activities. Transit operators must meet several requirements including farebox recovery ratio, and other goals established by SANDAG through the RSRTP and the Coordinated Plan.

Transportation Development Act allocations are authorized under four separate articles of the law. Article 3 funds are designated for bicycle and pedestrian projects. Article 4 funds are used to provide general public transit services. Article 4.5 funds are designated for community transit services, and by SANDAG Board policy are allocated within the San Diego region to support paratransit services required by the ADA. Article 8 supports specialized services such as express bus and ferry services. A summary of the FY 2008 TDA claims is shown in Table 9.5.

Table 9.5: Transportation Development Act (TDA) FY 2008 Claims Summary (Revised Apportionment)

	Metropolitan Transit System	North County Transit District[1]	SANDAG	CTSA	Bicycle and Pedestrian[2]	County Auditor	Total
FY 2008 Available Apportionment	$83,773,463	$33,436,022	$4,198,720	$117,369	$2,394,426	$42,000	$123,962,000
Prior Year Carry-over	$2,633,469	$6,713,129	$3,025,007	$17,783	$468,316		$12,857,704
FY 2008 Claims							
Article 3 - Non-Motorized (bicycle and pedestrian)					($2,862,680)		($2,862,680)
Article 4 - General Public Transit							
Operations	($64,205,495)	($35,172,180)					($99,377,675)
Capital	($8,157,307)	($5,350,000)					($13,507,307)
Planning/Administration	($6,600,000)						($6,600,000)
Capital Transfer to SANDAG	($173,600)[3]						($173,600)
Administrative/Planning Transfer to SANDAG	($2,329,302)	($532,475)					($2,861,777)
Article 4.5 - Community Transit Service (accessible service for the disabled)	($4,104,593)	($1,780,000)		($113,537)			($5,998,130)
Article 8 - Special Provisions							
Express bus	($693,350)						($693,350)
Ferry service	($143,285)						($143,285)
Planning/Administration							
Administration			($496,000)			($42,000)	($538,000)
SANDAG Regional Planning			($3,487,720)				($3,487,720)
Balance	**$0**	**($2,685,504)**	**$3,240,007**	**$21,615**	**$62**	**$0**	**$576,180[4]**

[1] Additional NCTD TDA carry-over balance of $4,618,876 remains uncommitted.
[2] In addition to prior year carry-over, includes amount of funds to be returned for completed projects to the Capital Bicycle and Pedestrian Program.
[3] For the Escondido Maintenance Facility Project.
[4] Any remaining balance will be carried over in the next Fiscal Year apportionment. This includes $3.2 million to SANDAG and $0.02 million to the CTSA.

Fares

SANDAG is responsible for establishing the regional fare policy for all public transit operations in San Diego. SANDAG will be proposing a new unified fare structure and price levels during the fall of 2008. The new fare structure also will include recommendations on how fare revenue should be shared between the two districts.

Tolls

The existing and future managed lane programs on regional freeways including Interstate 15 (I-15), I-805 and I-5 are designed to pass any surplus revenues from the roadway to the transit agencies. At the present time, MTS receives any surpluses generated from the existing I-15 toll segment. The amount of money generated by the managed lanes does vary and has currently fallen from a high of about one million dollars to less than $300,000. As more managed lanes are built or extended, it is anticipated that this revenue source will grow.

Air Quality Control District (APCD) Quality Improvement Fund

The County of San Diego's 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. Caltrans recently provided mitigation funding for MTS Route 89 due to the reconstruction of the I-5/I-805 merge. Temporary mitigation funding may be available for future highway projects.

CHAPTER 10

IMPLEMENTATION

10 Implementation

Implementation of 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). SANDAG will service 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 RTP, develops operating plans for regional services identified in the *TransNet* ordinance, funds services, and implements projects identified in the *TransNet* ordinance. SANDAG also will be involved in developing and promoting some alternative transportation modes (e.g., vanpools) and enhancing transportation information (e.g., 511).

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

10.1 Competitive Processes

A call for competitive proposals will be issued to public and private providers for funding opportunities such as Section 5310 (elderly and persons with disabilities), Jobs Access and Reverse Commute (JARC), New Freedom (NF), and the *TransNet* senior mini-grant program.

Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) specifically requires the designated recipient (SANDAG) of JARC and NF funds to hold a competitive process to solicit projects that respond to the needs and strategies identified in this Coordinated Plan. SANDAG, as the designated recipient for the urbanized area of San Diego County, will undertake a competitive process in FY 2009 based on the needs, strategies and priorities identified in this plan. The Senior Mini-Grant program also is being coordinated with the JARC and NF processes.

In addition, SANDAG also will participate in the 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 will be managed by Caltrans on a statewide basis; however, SANDAG will provide evaluations of local applications.

SANDAG does not participate in the competitive process for JARC and NF applications from the rural areas of the county. This competitive process is run by Caltrans on a statewide basis. All projects selected by Caltrans for the rural area must be derived from the Coordinated Plan prepared by SANDAG.

10.2 Transit Budgets

Each year the Metropolitan Transit System (MTS) and the North County Transit District (NCTD) are required to submit a Service Implementation Plan (SIP) in advance of budget approvals. The purpose of the SIP is for the transit agencies to identify what actions they will be taking in the next year to

implement services that respond to regional goals and objectives. However, due to timing of the SPRINTER bus redesign project, budget deficiencies at MTS and the overall lack of additional funding to develop or improve service, the transit agencies did not prepare the SIPs this year. In future years, the evaluation of Transportation Development Act goals and objectives will enable MTS and NCTD to prepare SIPs that respond to the issues, needs, and gaps identified by SANDAG.

10.3 Post Implementation Monitoring

The 2007-2011 Coordinated Plan focused on developing quantitative objectives and indicators for transportation services. This updated Coordinated Plan has begun the process of evaluating the performance of the transportation system 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 also are 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 also should 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.

10.4 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 FY 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 addition, the success of the Comprehensive Operations Analysis and the opening of the SPRINTER in December 2007, followed by the Interstate 15 and South Bay Bus Rapid Transit, and Mid-City Rapid Bus projects later 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.