



Santa Cruz County Regional Transportation Commission's
Elderly & Disabled Transportation Advisory Committee
(Also serves as the Social Service Transportation Advisory Council)

AGENDA ~ 1:30pm- 3:30pm, Tuesday, April 10, 2018

Regional Transportation Commission Santa Cruz Office
1523 Pacific Avenue, Santa Cruz, CA, 95062 (2nd Floor)

1. **1:30pm – Call to Order**
2. **1:30pm - Introductions**
3. **1:35pm - Oral communications**
4. **1:40pm- Additions or deletions to the consent or regular agenda**

1:42pm- CONSENT AGENDA

All items appearing on the consent agenda are considered to be minor or non-controversial and will be acted upon in one motion if no member of the E&D TAC or public wishes an item be removed and discussed on the regular agenda. Members of the E&D TAC may raise questions, seek clarification or add directions to Consent Agenda items without removing the item from the Consent Agenda as long as no other E&D TAC member objects to the change.

5. **Approve minutes from December 12, 2017 (pg.4)**
6. **Approve minutes from February 13, 2018 (pg.9)**
7. **Receive RTC Meeting Highlights (pg.13)**
8. **Receive Highway 9 Corridor Transportation Plan Fact Sheet (pg.15)**
9. **Receive Information Items (pg.17)**
 - a. "Public transport poses problems for those with mental disorders." Science Nordic. Retrieved from <http://sciencenordic.com>
 - b. Carolyn Said, February, 2018. "Uber does not have enough wheelchair accessible vehicles, new lawsuit says." San Francisco Chronical.
 - c. Anderson, Claire. January, 2018. "VTA drops youth fare and releases new app amongst 2018 Improvements."

10. **Receive Transportation Development Act Revenues Report (pg.26)**
11. **Receive Agency TDA Reports -none**
12. **Receive Agency Updates** *(other than items on the regular agenda)* **(pg.27)**
 - a. Volunteer Center-none
 - b. Community Bridges-none
 - c. Santa Cruz Metro
 - i. Santa Cruz Metro Fare Restructuring, February 23, 2018 Staff Report
Santa Cruz Metro
 - ii. Santa Cruz Metro Fare Restructuring, March 23, 2018 Staff Report
 - iii. Metro ParaCruz Operations Status Report for October, November and December 2017

REGULAR AGENDA

13. **1:45pm- Appointment of Chair and Vice Chair (pg.54)**
14. **1:55pm - Presentation from The Village (pg.55)**
15. **2:05pm- 2018 Unmet Paratransit and Transit Needs List (pg.56)**
16. **2:20pm- Transportation Development Act Claim for Volunteer Center (pg.66)**
17. **2:30pm- Transportation Act Claim for Community Bridges (pg.78)**
18. **2:45pm- Transportation Act Claim for Santa Cruz Metropolitan Transit District (pg.100)**
19. **3:00pm- Measure D: Direct Allocation to Community Bridges Lift Line Five-Year Plan (pg. 124)**
20. **3:10pm- Measure D: Regional Five-Year Plan (pg. 132)**
21. **3:25pm- Pedestrian Safety Workgroup Update**
22. **Adjourn**

Next meeting: 1:30 pm, June 12, 2018 @, City of Watsonville Community Room B, 275 Main Street, Suite 400, 4th Floor.

HOW TO REACH US

*Santa Cruz County Regional Transportation Commission
1523 Pacific Avenue, Santa Cruz, CA 95060
Phone: (831) 460-3200 / fax (831) 460-3215
Email: info@sccrtc.org / website: www.sccrtc.org*

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**Santa Cruz County Regional Transportation Commission
Elderly & Disabled Transportation Advisory Committee**
(Also serves as the Social Service Transportation Advisory Council)

DRAFT MINUTES

Tuesday, December 12, 2017

**Santa Cruz County Regional Transportation Commission Office
1523 Pacific Avenue, Santa Cruz, CA 95060**

1. Roll call

The meeting was called to order at 1:34 p.m.

Members present:

Pam Arnsberger, 2nd District
John Daugherty, Metro Transit
Veronica Elsea, Social Service
Provider, Seniors
Lori Welch-Bettencourt, 5th
District
Tara Ireland, Volunteer Center

Alternates present:

April Warnock, Metro Transit/
ParaCruz

Excused absences:

Dulce Lizarraga-Chagilla, Social
Service Provider – Seniors
Lisa Berkowitz, CTSA
Kirk Ance, CTSA – Lift Line

Unexcused absences:

Greta Kleiner, Potential Transit
User Disabled
Cara Lamb, Potential Transit User

RTC staff present:

Grace Blakeslee
Ginger Dykaar
Anais Schenk

Others present:

Sean Vienna, AMBAG
Jesus Bojorguez, CTSA

2. Oral communications

- John Daugherty communicated that the METRO Headways with the winter schedule was available. John Daugherty also read the statement from METRO Board Chair, Jimmy Dutra, included in the METRO Headways, thanking voters for approving Measure D.
- Veronica Elsea announced that there are three vacancies on the Metro Advisory Committee. Veronica Elsea also announced that the Voter

Accessibility Advisory Committee is interested in providing seniors and people living with disabilities information about transportation services to voting locations and requested people contact her if they know a group interested in receiving a presentation.

3. Additions or deletions to consent and regular agendas

Clay Kempf, E&D TAC member, requested to move items 10b&c to the regular agenda. Items 10b&c were moved to item 14a.

CONSENT AGENDA

4. Approved Minutes from the November 14, 2017
5. Received Transportation Development Act Revenues Report
6. Received RTC Meeting Highlights
7. Received E&D TAC Roster
8. Received Information Items
 - a. Letter from RTC's Bicycle Committee to US Army Corps of Engineers Regarding Pajaro River Flood Risk Management Study-DRAFT General Reevaluation and Integrated Environmental Assessment Comments
9. Received Agency Updates
 - a. Volunteer Center: None
 - b. Community Bridges: 4th Quarter TDA Report
 - c. Santa Cruz Metro:
 - i. Discussion about Initiating a Fare Restructuring Analysis
 - ii. ParaCruz Report (July, August, September 2017)

Action: A motion (Welch-Bettencourt/Daugherty) was made to amend the November 14, 2017 minutes to correct the name of the E&D TAC member representing District 3 to Lori Welch-Bettencourt and approve the November 14, 2017 minutes as amended. The motion passed with members Daugherty, Elsea, Welch-Bettencourt, Ireland, Arnsberger, and Lamb voting in favor.

Action: A motion (Kempf/Arnsberger) was made to approve the consent agenda. The motion passed with members Daugherty, Elsea, Welch-Bettencourt, Ireland, Arnsberger, Kempf and Lamb voting in favor.

REGULAR AGENDA

10. Draft 2040 Santa Cruz County Regional Transportation Plan (RTP)

Ginger Dykaar, Transportation Planner, provided an overview of the Draft 2040 Santa Cruz County Regional Transportation Plan (RTP). The long-range plan is updated every 4 to 5 years and covers a 20-25 year time period. The Draft 2040 RTP is available for public review and comment from December 8, 2017 to February 5, 2018. The 2040 RTP is a long-range (22 year) transportation plan for the Santa Cruz County area. A public hearing for the Draft 2040 RTP will be held at 9:30am on Thursday, January 18, 2018 at the Santa Cruz County Regional Transportation Commission meeting located at the City of Santa Cruz Council Chambers, 809 Center St, Santa Cruz, CA 95060. The potential environmental impacts of the Draft 2040 RTP are collectively detailed in one Draft Environmental Impact Report (EIR) for the Draft 2040 Metropolitan Transportation Plan (MTP) and its Sustainable Communities Strategy (SCS), which encompasses the three RTPs for Santa Cruz, Monterey and San Benito Counties. The Draft EIR is available for public review and comment from December 4, 2017 to February 5, 2018. A public hearing for the Draft EIR will be held Tuesday, January 30, 2018 at the Live Oak Community Complex (Simpkins), 979 17th Street, Santa Cruz. Veronica Elsea commented on the challenges with the sometimes significant impacts that new and changing designs have on people using the transportation system and the importance of universal design concepts. She asked where information to address these impacts may be provided in the RTP.

11. Bike Signage Program Update

Anais Schenk, Transportation Planner, reported that the Bike Signage Program will result in the installation of approximately 875 signs directing bicyclists to preferred cycling routes and increasing motorists' awareness of shared roadway facilities to improve bicycle safety. Ms. Schenk reviewed the sign design, content, placement, and provided information about how committee members can provide input using the draft signing database. Committee members discussed the program cost, how people using the transportation system will identify the signs as bicycle routes, and ways to communicate the information about preferred routes to the public.

12. Seniors Summit – Transportation Session

Pam Arnsberger and Clay Kempf, E&D TAC Members, provided an overview of the 2017 Seniors Solutions Summit and provided information about the discussion regarding transportation challenges facing seniors. Ms. Arnsberger reported that the cost of public transit and difficulty navigating the transit system were issues raised by participants. Pam Arnsberger also reported that participants at the Seniors Solutions Summit discussed opportunities to provide individuals, in particular those individuals who may be considering giving up their driver's license due to cognitive or mobility disabilities, with information about how to use transit to increase transit ridership and shift rides from paratransit to fixed route services. Committee members discussed the value of providing a single point of information about transit services (ex. Mobility Management Center), free or reduce cost transit services to seniors, a

transit buddy system for seniors, transit rides for senior caregivers, and pedestrian access to transit. Committee members also discussed the significance of fare box ratio in determining transit revenues. Committee members emphasized the importance of one-on-one service when communicating with seniors, the value of volunteer services for seniors, and providing seniors with information about driving and car maintenance safety. John Daugherty informed attendees about the resources available through the California Highway Patrol "Age Well Drive Smart" program located at the Aptos Library. The "Age Well Drive Smart" program presentation solicits information about participant's perceptions of transit and provides information about transit services.

13. METRO Fare Structure and Paratransit Service Reports (moved from Item 10b&c)

Committee members discussed how potential changes to the METRO transit fare structure may increase the cost of transit services for seniors and people living with disabilities. Clay Kempf, E&D TAC Member, noted that ParaCruz's on-time performance is decreasing and ridership is going down. Mr. Kempf requested that a discussion of the METRO's paratransit service be continued to the February 13, 2018 E&D TAC meeting.

Action: A motion (Arnsberger/Kempf) was made to send a letter to METRO to request information about the fare restructure analysis, public input process, and timeline. The motion passed with members Daugherty, Elsea, Welch-Bettencourt, Ireland, Arnsberger, and Lamb voting in favor.

14. Cruz511 In Your Neighborhood Program Results

Grace Blakeslee, Transportation Planner, presented results of the Cruz511 in Your Neighborhood pilot program, which focused on reducing the number of drive alone trips and increasing the number of trips made by bus, biking, walking, and carpooling. She provided information about program participation, effective outreach and the overall program results. The Committee asked questions about participation across neighborhoods and demographics.

15. 2018 E&D TAC Calendar

Grace Blakeslee, Transportation Planner, reviewed the 2018 E&D TAC Calendar. Grace Blakeslee pointed out that the June meeting will be in the City of Watsonville. Veronica Elsea noted the date correction to list the August 14, 2018 E&D TAC meeting date.

16. Pedestrian Safety Workgroup Update

Veronica Elsea, E&D TAC Chair, informed E&D TAC members that there is space for one more member on the Pedestrian Safety Workgroup. The

Pedestrian Safety Workgroup will be focusing on outreach for the new brochure What Pedestrians and Bicyclists Want Each Other to Know at the upcoming Pedestrian Safety Workgroup meetings.

17. Adjourn

Meeting adjourned at approximately 3:50 p.m.

The next E&D TAC meeting is scheduled for Tuesday, February 13, 2018 at 1:30 p.m. at the RTC Offices, 1523 Pacific Avenue, Santa Cruz, CA.

Respectfully submitted,

Grace Blakeslee, Staff



**Santa Cruz County Regional Transportation Commission
Elderly & Disabled Transportation Advisory Committee**
(Also serves as the Social Service Transportation Advisory Council)

DRAFT MINUTES

Tuesday, February 13, 2018

**Santa Cruz County Regional Transportation Commission Office
1523 Pacific Avenue, Santa Cruz, CA 95060**

1. Roll call

The meeting was called to order at 1:32 p.m.

Members present:

Pam Arnsberger, 2nd District
Veronica Elsea, 3rd District
Lori Welch-Bettencourt, 4th
District
Lisa Berkowitz, CTSA
Kirk Ance, CTSA – Lift Line
Cara Lamb, Potential Transit User
John Daugherty, Metro

Alternates present:

Patty Talbot, Social Service
Provider-Seniors
Donna Patters, Social Service
Provider- Person of Limited
Means
Tom Duncanson, 2nd District

Excused absences:

Unexcused absences:

RTC staff present:

Grace Blakeslee
Joanna Edmonds

Others present:

Sean Vienna, AMBAG
Barrow Emerson, Metro
Camilla Schaffer, First Transit
Beck Steinbruner
Tom Stunbaw
Cat Steele

2. Introductions

3. Oral communications – Moved to the end of the agenda by the Chair

4. Additions or deletions to consent and regular agendas

Veronica Elsea, E&D TAC chair, requested to move Items 9a and 9b to the regular agenda as Items 11a and 11b. Item 11 became Item 11c.

Grace Blakeslee, Transportation Planner, provided replacement pages for Item 5.

CONSENT AGENDA

5. Tabled approval of minutes from December 12, 2017 until next meeting
6. Received RTC Meeting Highlights
7. Received Transportation Development Act Revenues Report
8. Received FY 18-19 TDA Claims Funding Cycle Calendar
9. Received Information Items
10. Received Agency TDA Reports

Action: A motion (Arnsberger/Daugherty) was made to approve the consent agenda Items 6- 10 and table Item 5, approval of minutes from December 12, 2017, until the next meeting.

REGULAR AGENDA

11a & b. Letter from E&D TAC to the METRO Regarding Fare Structure Analysis dated January 5, 2018 & Letter from METRO to the E&D TAC Regarding Fare Structure Analysis dated January 19, 2018

Barrow Emerson, Planning Director for METRO, described the purpose of the Fare Restructuring and described the public outreach process. Mr. Emerson explained that METRO will be addressing their deficit in the next few years and is looking for additional revenue sources. METRO will examine potential changes to passenger fare payments as part of the Fare Restructuring analysis. Paracruz and the Highway 17 Express bus fares will not be considered in the Fare Restructuring analysis.

Committee members discussed potential changes in transit ridership as a result of fare changes and the impact of fare increases on low income individuals and seniors considering shifting away from driving to transit. The Committee discussed options for providing fare subsidies to eligible transit riders and expressed concern that the METRO survey associated with the fare restricting did not inquire about the impact of fare increases on individual's transportation choices. Members of the public inquired about unused paid fares, contracts with UCSC and Cabrillo for transit services, and potential new contracts for transit services with local jurisdictions and employers.

No Action taken.

11c. Preliminary Draft 2018 Unmet Needs

Grace Blakeslee, Transportation Planner, provided an overview of the Preliminary Draft 2018 Unmet Needs List. Committee members discussed paratransit and transit needs and recommended updates to the Preliminary Draft 2018 list related to pedestrian crossings across rail road tracks, same day medical transportation, free transit options, bus stop amenities and improvements, and transportation to activities and services beyond those trips required to meet basic needs.

No Action taken.

12. Guide for Specialized Transportation

Grace Blakeslee, Transportation Planner, discussed updates to the Guide for Specialized Transportation for Seniors and People with Disabilities in Santa Cruz County.

Committee members discussed the potential for including The Village, a new membership based organization to help seniors age in place, and Lyft and Uber services to the Guide for Specialized Transportation.

13. Pedestrian Safety Workgroup Update

Veronica Elsea, E&D TAC Chair, informed E&D TAC members that the Pedestrian Safety Workgroup met on February 9, 2018 and discussed the What Pedestrians and Bicyclists Would Like Each Other to Know brochure design, printing and distribution.

No Action taken.

14. RTC State and Federal Legislative Program

Grace Blakeslee, Transportation Planner, provided an overview of the RTC's adopted 2018 Legislative Plan. Ms. Blakeslee informed Committee members about Proposition 69, which would safeguard California Senate Bill 1 revenues.

No Action taken.

15. Notice of Chair and Vice Chair Election

Veronica Elsea, E&D TAC Chair, informed E&D TAC members that there will be an election at the beginning of April meeting for the Chair and Vice Chair positions.

Item #3 Oral Communications: Becky Steinbruner, member of the public, expressed concerns about transportation safety near the Aptos Village Project. Tom Stunbaw, member of the public, expressed concerns with transportation safety near the relocated bus stop on Soquel near Trout Gulch.

16. Adjourn

Meeting adjourned at approximately 3:50 p.m.

The next E&D TAC meeting is scheduled for Tuesday, April 10, 2018 at 1:30 p.m. at the RTC Offices, 1523 Pacific Avenue, Santa Cruz, CA.

Respectfully submitted,

Grace Blakeslee, Staff



Santa Cruz County Regional Transportation Commission
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Santa Cruz County Regional Transportation Commission (RTC) February 01, 2018 Meeting Highlights

City of Santa Cruz Coastal Rail Trail Design

The Regional Transportation Commission received a report on the City of Santa Cruz implementation of a 2.1-mile rail trail project from Natural Bridges Drive to Pacific Avenue. The plans and specifications include an interim re-route off the continuous alignment. Stay up to date on this project by visiting our website: www.sccrtc.org/trail.

Cruz511 In Your Neighborhood Final Report

The [Regional Transportation Commission](http://www.sccrtc.org) received the final report for the Cruz511 In Your Neighborhood program. The program focused on reducing the number of drive alone trips and increasing the number of trips made by bus, biking, walking, and carpooling in Santa Cruz County. The program was carried out between March 2017 and September 2017. The Cruz511 In Your Neighborhood Final Report is available at www.sccrtc.org/multi-modal.

2018 Legislative Program and Funding Updates

The Regional Transportation Commission approved [State and Federal legislative priorities for 2018](#). The focus will be to preserve funding for transportation projects, support constitutional protections of SB1 and other transportation funding from diversion and oppose any repeal efforts.

Santa Cruz County Regional Transportation Commission (RTC) March 1, 2018 Meeting Highlights

RTC Votes to Protect and Maintain Transportation Revenues

The RTC went on record supporting efforts to protect and maintain state transportation revenues and opposing efforts to repeal California Senate Bill 1 (SB 1): the Road Repair and Accountability Act of 2017, which provides approximately

Public input on transportation issues is welcomed and encouraged. For more information, visit the SCCRTC website at www.sccrtc.org or call 460-3200. Some Regional Transportation Commission meetings are televised countywide by Community TV of Santa Cruz. Consult www.communitytv.org or call 831-425-8848 for schedule and station information.

\$20 million a year for local road maintenance, public transit, highway safety, and other priority transportation projects. SB 1 also provides opportunities for Santa Cruz County to use local voter-approved Measure D sales tax to leverage additional state funds. The new SB 1 transportation funds are generated through taxes on motor fuels and vehicle fees, which took effect November 1, 2017 and January 1, 2018. The [RTC](#) supports Proposition 69, the California Transportation Taxes and Fees Lockbox and Appropriations Limit Exemption Amendment, which ensures transportation revenues are not diverted for other uses by the state, and opposes efforts to repeal SB 1.

State Funding Updates

The [RTC](#) received an update on the 2018 State Transportation Improvement Program (STIP) and other state funding programs. Due in large part to stability provided by Senate Bill 1, \$26.5 million from the STIP is expected to be available through 2023 to local projects that were previously approved by the RTC. Projects funded by the STIP include local roadway repairs, bus replacements, projects on Highway 1, and bicycle and pedestrian projects. The list of STIP projects is online at www.sccrtc.org/rtip.

Early Mitigation for Transportation Improvements in Santa Cruz County – MOU Approval

The [RTC](#) authorized the Executive Director to sign a Memorandum of Understanding (MOU) with local, state, and federal agencies responsible for coordinating watershed-based resource conservation with early mitigation planning for transportation projects in Santa Cruz County. This MOU is a prototype agreement to facilitate early mitigation planning to address impacts on natural resources associated with transportation projects.

Cap and Trade Funds Approved for Santa Cruz Metropolitan Transit District Electric Bus

The Regional Transportation Commission designated \$339,000 from the region's 2018 share of funds from the Low Carbon Transit Operations Program (LCTOP) to Santa Cruz METRO to purchase a battery-electric bus that will serve Watsonville. This state program, designated for transit projects which will reduce greenhouse gas emissions, is funded by revenue collected from the sale of carbon emission credits, also known as the "Cap & Trade" program.

Public input on transportation issues is welcomed and encouraged. For more information, visit the SCCRTC website at www.sccrtc.org or call 460-3200. Some Regional Transportation Commission meetings are televised countywide by Community TV of Santa Cruz. Consult www.communitytv.org or call 831-425-8848 for schedule and station information.

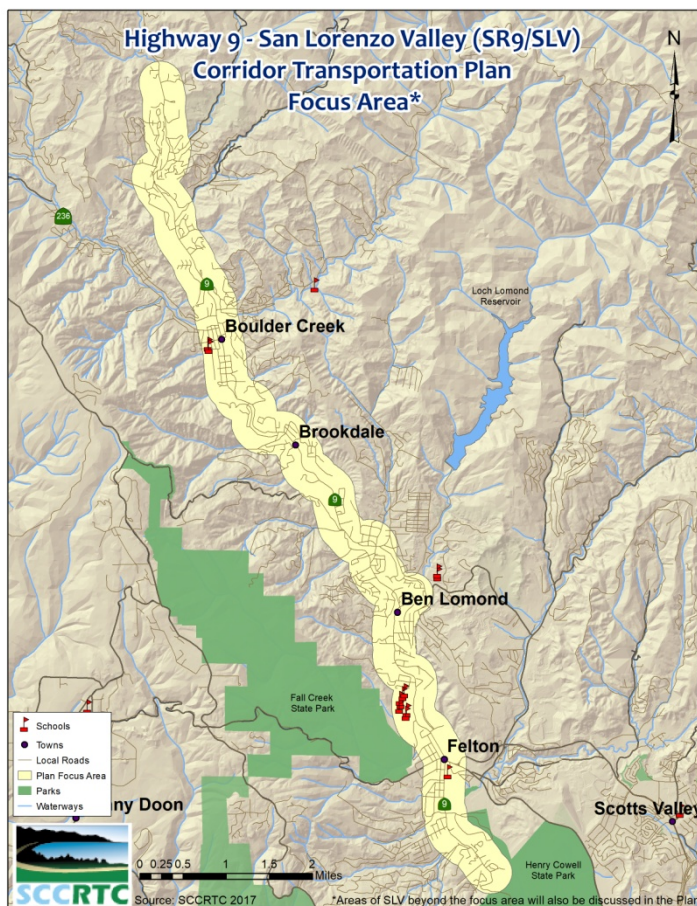
Project Summary

A complete streets plan is being prepared for Highway 9 and connecting county roads through San Lorenzo Valley (SLV) that identifies, prioritizes, and enables implementation of the most critical and cost effective transportation projects. This mountainous roadway serves as the “Main Street” and economic center for the towns of Felton, Ben Lomond, Brookdale, and Boulder Creek and as an interregional arterial connecting Silicon Valley and Santa Cruz. This plan will focus on safety for pedestrians, bicyclists and motorists; access to schools, businesses, and bus stops; traffic operations, pavement conditions, drainage and other needs in this travel corridor.



Why is this plan needed?

A comprehensive multimodal transportation plan is needed to evaluate and prioritize transportation projects that can be implemented in the short and mid-term to address challenges on the corridor, especially since state, federal, and local revenues are severely constrained.



This comprehensive plan for Highway 9 through San Lorenzo Valley will:

- build on past public input and planning activities,
- document existing conditions,
- identify infrastructure gaps,
- answer questions about what can be done within Caltrans’ right-of-way,
- provide data, evaluation, and public deliberation to make informed decisions,
- identify priorities for voter-approved

[Measure D](#) funds designated for the corridor.



This corridor-specific plan will be a stepping stone to securing funding for priority investments and provide a framework for partnering with Caltrans to implement investments that address community concerns, improve multi-modal safety, access, connectivity, economic vitality and

environmental quality, and improve the condition of existing infrastructure (e.g. fill potholes). The completed plan will include conceptual complete street designs and be used to facilitate subsequent design, environmental review and construction of improvements.

Public Outreach

San Lorenzo Valley residents, businesses, community groups, parents and school administrators regularly express concerns about Highway 9. Meetings held since 2013 have accentuated the need for a comprehensive plan. Building upon past public outreach efforts, community meetings were held in October 2016 and May 2017 and an online survey solicited input during summer 2017. The project team will continue to gather input from community members, including organizations who serve low-income individuals and families, monolingual Spanish speakers, seniors, persons with disabilities, and youth throughout development of the plan using a range of collaborative activities, including surveys, Town Hall meetings, and grassroots outreach.

- The community can sign up for the Highway 9 E-news List by emailing info@sccrtc.org, calling 831-460-3200 or signing up on the RTC website: <http://sccrtc.org/about/esubscriptions/>
- Comments can be sent to SCCRTC: info@sccrtc.org or 1523 Pacific Avenue, Santa Cruz, CA 95060.

Major Milestones

- Corridor Travel Analysis and Needs Assessment: Included review of existing and projected future conditions and identification of potential projects (investment options) that improve access, mobility, safety, and operations.
- **Spring/Summer 2017: Community members provided input on the Draft Phase 1 Report (available online at www.sccrtc.org/slv), identified goals and objectives, and challenge areas, and provided input on some of specific ideas previously prioritized by the community.**
- **Underway:** Evaluation and Prioritization of Investment Options. Evaluation criteria are being used to analyze the degree to which different projects/investments would address challenges and advance goals for the corridor. This analysis will result in a prioritized list of short-term and mid-term projects that are reasonable to implement in consideration of financial realities and community priorities.
- **Corridor Plan:** The final plan is expected to reflect community consensus on investment priorities. *The draft plan is expected to be available for public review in the spring of 2018.*

Project Team

The Santa Cruz County Regional Transportation Commission (RTC) is the lead agency for this project, implemented in partnership with Caltrans, the County of Santa Cruz, Santa Cruz Metropolitan Transit District (METRO), residents, businesses, schools, and other stakeholders. The consultant team of Kimley-Horn and TrailPeople is preparing the plan.



This planning effort is funded through a \$249,000 Caltrans' Sustainable Communities Transportation Planning Grant (FTA 5304) and local funds.



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www.sccrtc.org/slv

Public transport poses problems for those with mental disorders

[Society & Culture](#)[1]

[Society & Culture](#)[1][Mental health](#) [2][Norway](#) [3][Forskning.no](#) [4]

Many of us experience mental disabilities of one kind or another in the course of life. A new study points out problems this can cause for users of public transport services.

Two challenges stand out – large crowds of people and the experience of lacking information. These were the findings by researchers at Norway's Institute for Transport Economics (TØI).

Our society is slowly but surely making more allowances for persons with disabilities. Most of the initiatives have aimed at easing life for those with physical disabilities.

The current understanding in building codes, designs and regulations, called universal designing, predominantly targets the needs of persons with physical handicaps. This tends to be the norm in political debates, public documents and efforts to include one and all in society.

Researchers at TØI, working on an assignment from the Delta Centre of the Norwegian Directorate for Children, Youth and Family Affairs, looked into the barriers that people with mental disabilities encounter when they attempt to get from one place to another.

The TØI researchers interviewed persons with anxiety, Asperger's Syndrome, bipolar disorder and depression.

Crowding and crowds

The researchers found that crowding and crowds are experienced as a major hindrance for persons with these mental problems who wish to use public transport. Many explained that they consciously try to avoid using trams, buses, subways and trains during rush hours.

Lack of information about the trip is another thing that hampers this segment of the public.

Digital information that tells how far away the next bus, train or tram is – called real-time information – can be provided to aid persons with mental disorders in using public transport.

People who suffer anxiety might not summon the nerve to step onto the first bus going their way. It then helps if they can see when the next bus will arrive at this stop.

Having to make one or more transfers is an obstacle for many of those interviewed. The process of standing around waiting can fuel anxieties.

Cars and trains best

Many with mental disabilities find cars to be a means of getting about nearly on a par with others, according

to the researchers.

Trains are experienced as better alternatives when it comes to public transport.

Many emphasise the need for divisions or screens between seats on a train or bus.

Travelling less than others

Previous research has shown that persons with mental disabilities travel less than others.



Research has also shown that poor access to public transport leads to social isolation and aggravates symptoms. Ample access to transportation has the opposite effect.

The researchers suggest 19 practical initiatives planners can consider for the improvement of travel experiences for persons with mental disabilities.

Some of these are:

- Better space per passenger
- Seats and benches at stops and stations
- Standards for information dissemination
- Integrated information and app solutions for all transport companies
- Standards for information given by drivers
- Accessible personnel
- More frequent departures or alternative solutions with cars/taxis in rural areas
- Courses on mental health for personnel
- ID certificate cards proving need for assistance plus several other improvement and expansions of current welfare provisions related to transport costs and services

[Read the Norwegian version of this article at forskning.no.](#) [5]

 [Many who have mental disorders find crowding such a problem that they shun public transport. \(Illustrative photo: Charlotte Sverdrup/Ruter pressefoto\)](#) [6]
 [_mg_0019.jpg](#) [7]

[Air pollution hurts children's mental health](#) [8] [Can orange light help patients with mental illness?](#) [9]
[Anja Fleten Nielsen og Kåre Skollerud: 'Universell utforming av transportsystemer for grupper med nedsatt psykisk funksjonsevne?', TØI, January 2018.](#) [10]

[Bård Amundsen](#) [11]
Glenn Ostling

February 12, 2018 - 06:20

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Uber does not have enough wheelchair-accessible vehicles, new lawsuit says

By Carolyn Said February 27, 2018 Updated: February 27, 2018 4:17pm

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Photo: Paul Chinn, The Chronicle

Axis Dance Company founder Judith Smith (left), shown here watching dancers rehearse, is among wheelchair users suing Uber for what they say is the company's lack of accessible vehicles available in Alameda and San Francisco counties.

When you request an Uber ride, you can swipe through options such as UberX, Pool, Black, SUV and WAV, which stands for “wheelchair accessible vehicle.”

But according to a lawsuit filed Tuesday that is seeking class-action status, the wheelchair-accessible vehicles are rarely if ever available in San Francisco and Alameda counties. “Although the app includes an UberWAV button, the reality is that this button is a sham,” the lawsuit said.

Even when there are vehicles, customers must wait much longer for them than for other types of Uber rides, it says.

“Uber is required by law to provide full and equal access to its services to all people regardless of whether or not they have a disability,” said Melissa Riess, staff attorney at Berkeley’s Disability Rights Advocates, which filed the suit in Alameda County Superior Court. “This would be a real life-changer for people with mobility disabilities. Having an option to take them door to door on demand would give them a huge amount of flexibility and independence.”

An Uber spokesman said in an email: “We take this issue seriously, and are continuously exploring ways to facilitate mobility and freedom via the Uber app for all riders, including riders who use motorized wheelchairs.”

“It is discriminatory,” said one of the lawsuit’s plaintiffs, Judith Smith, founder and artistic director emerita of Oakland’s Axis Dance Company, which brings together dancers with and without physical disabilities. “For those of us who use power wheelchairs and cannot transfer into a vehicle, it means we are not able to have the same access to Uber. I would love to have the ease of opening my phone and knowing I would have a ride show up.”

“We are deeply disappointed in Uber’s continued resistance to following the laws that keep transportation services open to everyone,” said Jessie Lorenz, executive director of the Independent Living Resource Center of San Francisco, which is another plaintiff, in a statement.

Riess said her nonprofit made UberWAV requests over six or seven weeks in multiple spots in San Francisco and Alameda County. “We were never able to access a wheelchair-accessible vehicle in Alameda County,” she said. “In San Francisco, 80 percent of the time there was no vehicle available.”

The group found similar issues with Lyft, she said, but is starting its legal action against Uber because it is bigger. Lyft did not immediately respond to a request for comment.

The suit does not seek monetary damages. Instead, it wants Uber to institute “a comprehensive remedial scheme to address its current exclusion of riders with mobility disabilities,” according to a **statement** from Disability Rights. The lawsuit notes that Uber does provide widespread wheelchair-accessible transportation in London and six other cities in the United Kingdom.

RELATED



San Francisco medical examiner identifies man killed in head-on crash



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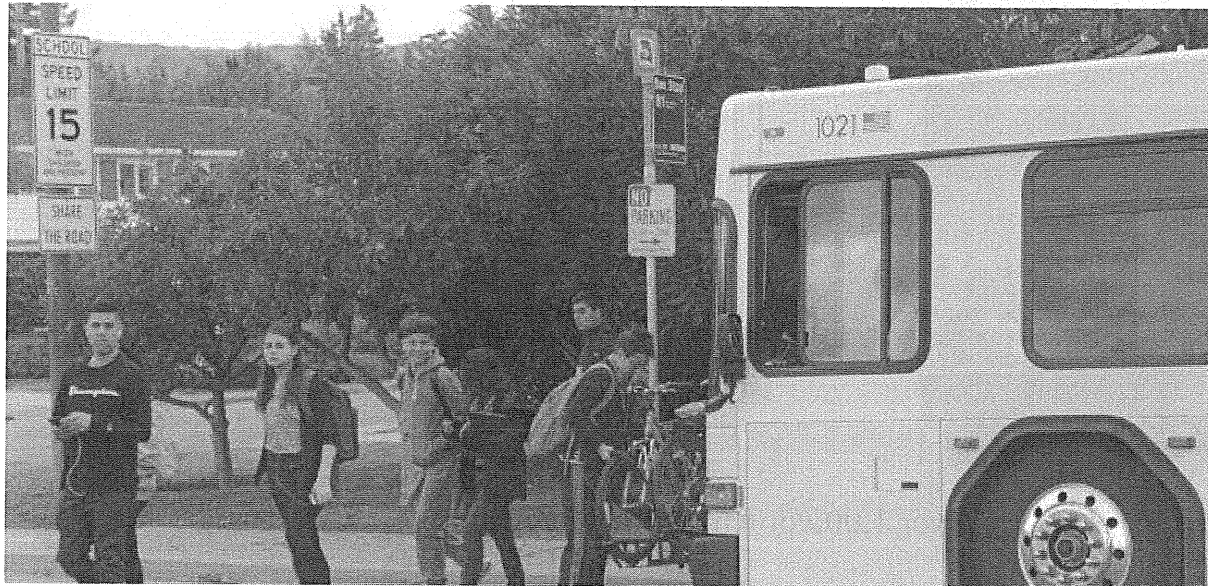
“We want them to make this a viable, reliable service that people with mobility disabilities who use wheelchairs can rely on, like all other Uber users,” Riess said.

Uber’s and Lyft’s state regulator, the California Public Utilities Commission, requires them to submit annual reports about their disability access, but it keeps those reports sealed. That information is among data that City Attorney Dennis Herrera is seeking with a subpoena. Lyft does provide the records to San Francisco, but they can be seen **only by city staff**.

Similar suits are pending against Uber in New York, Chicago and Washington, D.C.

Carolyn Said is a San Francisco Chronicle staff writer.

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VTA Drops Youth Fare And Releases New App Among 2018 Improvements

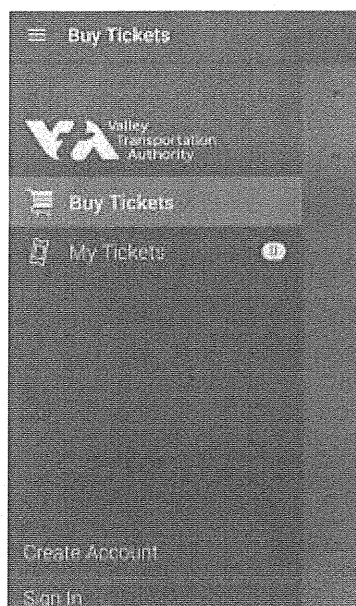
By: Claire Anderson on January 25, 2018

The Valley Transportation Authority started the new year by implementing several changes, including modifying their fare rates and offering new payment methods. The youth bus and light rail fare for single rides has dropped from \$1.75 to \$1, while the adult fare has increased from \$2 to \$2.25.

Sophomores Sarah Teng and Aminah Carrington regularly take the bus to school and said they appreciate the change.

“If you have to go a long way on the bus, it’s more reasonable [to pay \$1],” Teng said.

While both students said that the change in price would be unlikely to affect their day-to-day lives, they noted the impact it could have on students and their families.



The EZFare app has over 1,000 downloads in the Google Play Store

“I know that for other people, it would have been a struggle [if the price had increased],” Carrington said.

In addition, the launch of VTA’s EZfare mobile app allows riders to pay for their fare with their mobile device.

According to the VTA website, the EZfare app allows riders to pay for their tickets in advance, eliminating the need to bring cash to the bus. The app also allows riders to store multiple ticket purchases to eliminate extra hassle.

By purchasing a single ride ticket through the EZfare app or with a Clipper card, riders can get free transfers across buses and light rail for two hours.

Although neither student uses the EZfare app to pay for their bus fare because they have Clipper cards, they can still see why this would be helpful to other students.

“Teenagers are usually on their phones, so maybe it might help, but I’m sort of like an old lady when it comes to technology,” Carrington said.

**SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION
TDA REVENUE REPORT
FY 2017-2018**

MONTH	FY16 - 17 ACTUAL REVENUE	FY17 - 18 ESTIMATE REVENUE	FY17 - 18 ACTUAL REVENUE	DIFFERENCE	DIFFERENCE AS % OF PROJECTION	CUMULATIVE % OF ACTUAL TO PROJECTION
JULY	629,500	637,054	583,500	-53,554	-8.41%	91.59%
AUGUST	839,400	849,473	778,000	-71,473	-8.41%	91.59%
SEPTEMBER	872,266	882,733	1,146,538	263,805	29.89%	105.86%
OCTOBER	657,500	665,390	665,500	110	0.02%	104.58%
NOVEMBER	876,700	887,220	887,300	80	0.01%	103.54%
DECEMBER	813,479	823,241	959,017	135,776	16.49%	105.79%
JANUARY	632,900	646,849	655,100	8,251	1.28%	105.25%
FEBRUARY	843,800	862,431	873,500	11,069	1.28%	104.70%
MARCH	911,051	781,837	855,723	73,886	9.45%	105.23%
APRIL	626,200	572,496				
MAY	834,900	763,397				
JUNE	563,619	814,337				
TOTAL	9,101,315	9,186,458	7,404,178	367,950	4.01%	81%

Note:

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DATE: February 23, 2018

TO: Board of Directors

FROM: Barrow Emerson, Planning & Development Manager

**SUBJECT: ACCEPT INITIAL FARE RESTRUCTURING ANALYSIS AND
CONCEPTS AND DIRECT STAFF TO INITIATE PUBLIC OUTREACH**

I. RECOMMENDED ACTION

That the Board of Directors receive initial fare restructuring analysis and concepts and direct staff to initiate public outreach

II. SUMMARY

- Santa Cruz Metropolitan Transit District (METRO) staff has been conducting preliminary analysis on fare restructuring for local and Highway 17 Express services, including opportunities for improved fare payment technology. There will be no increase in ParaCruz fares as part of this fare restructure.
- This analysis has determined that because of stagnant revenues and increasing costs, new revenue is necessary to avoid reducing service within the next five years.
- At its February 8th meeting, the Finance, Budget and Audit Standing Committee directed staff to present initial passenger fare restructuring analysis and concepts to the Board at its February 23rd meeting.
- Staff requests that the Board of Directors receive an initial analysis and concepts and direct staff to initiate public outreach.

III. DISCUSSION/BACKGROUND

Background

As part of long term financial and service planning, METRO staff has been conducting preliminary analysis of passenger fare restructuring for local and Highway 17 Express services, including technological upgrades to fare payment methods. There will be no increase in ParaCruz fares as part of this fare restructure.

This analysis is necessary because of potential risks to the 5-year balanced budget. Based on future budget projections (See Attachment A1 and A2), METRO will need additional revenue to maintain service levels over the next five years, as funding sources remain relatively stable while costs continue to increase.

Staff presented the initial passenger fare restructure analysis and concepts to the Finance, Budget, and Audit Standing Committee at its February 8th meeting.

The two key concepts presented were:

1. The relative amount of revenue that could be raised with either a \$0.25 or \$0.50 increase to the current \$2.00 base fare and accompanying equal increases in all pass costs for local METRO bus services.
2. A list of potential targeted strategies that could provide financial savings for sub-segments of METRO's ridership.

Scale of Revenue Opportunities

METRO's fixed-route passenger fare revenue for FY17 was \$9.4M with almost half of passenger fare revenue coming from funding contracts with UCSC and Cabrillo College for fixed route bus service that serves both college campuses. Based on FY17 ridership, the following is a preliminary estimate of potential fare revenue growth from passenger fare increases (Attachment B):

- A. A base passenger fare increase of \$0.25 with a 12.5% increase across all fares and contracts would result in approximately \$1M of **gross** revenue gain.
- B. A base passenger fare increase of \$0.50 with a 25% increase across all fares and contracts could result in approximately \$2M of **gross** revenue gain.

The purpose of providing these estimates is to clarify the potential scale of passenger revenue growth that is possible and its relative impact on the METRO annual budget. It is important to understand that the dollar values identified above are **only estimates of gross revenue** and that these values are not the real level of actual net revenue that would be gained, as it is assumed there would be lost ridership as a result of increased fares.

Historically, transit districts can see a ridership loss of around 4-5% with a 10% fare increase. Attachment B shows the potential impact of a 5% ridership loss, reducing potential revenue by approximately \$100,000 and \$200,000 respectively, for the two potential fare increase levels noted above.

The estimates above assume that, leaving the fare increase aside, annual ridership will remain stable, an assumption that is contrary to declining public transit ridership trends across the country.

It also important to understand that these projections assume the UCSC and Cabrillo service contracts also increase by the same percentages. The ability of the two colleges to accommodate these increases has not been confirmed.

Targeted Strategies

Separate from the two fare increase estimates noted above (A & B), Attachment B shows opportunities to implement targeted pricing strategies that would address various needs and issues of our non-UCSC/Cabrillo passenger ridership who are generally transit dependent and have lower incomes.

- Scenario 1 – Increase the base fare to \$2.25 or \$2.50 but decrease the relative cost of the day pass, by reducing the current day pass cost (\$6) from three times the base fare to 2 (\$4.50 or \$5) or 2.5 (\$5.50 or \$6.25) times the single ride fare.

This proposal is intended to encourage use and give financial relief to people required to take multiple trips in one direction to complete their one way journey, in part due to METRO service network limitations. This could reduce the gross revenue increase by \$60,000 to \$135,000 depending on which strategy is chosen.

The next three scenarios are intended to reduce the number of patrons paying with cash through discounts for using passes/SMARTCARDS. Reductions in cash payments have the opportunity to help reduce METRO operating costs such as boarding delays and fare processing as well.

- Scenario 2 – Increase the base fare to \$2.25 or \$2.50, but hold the current fare for payment using any of the various passes currently offered.

Passes are popular; therefore this scenario would have a significant impact on any potential revenue increase. Assuming 5% or 10% of patrons (depending on the level of fare increase) switch from paying single ride fares to using the discounted 15-Ride Pass this scenario could reduce the gross revenue increase by \$460,000 to \$1,200,000 depending on which strategy is chosen. This significant loss would be due to the extensive discount created if we did not increase the cost of passes at all. This scenario could result in a lower percentage of ridership loss compared to other scenarios discussed herein.

- Scenario 3 - Increase the base fare to \$2.25 or \$2.50, but hold the current fare for payments using a SMARTCARD.

There is currently limited use of SMARTCARDS because of difficulty in acquiring and reloading them. Some potential fare technology improvements could address this issue. This could reduce the gross revenue increase by \$57,000 to \$93,000 depending on which strategy is chosen.

- Scenario 4 – Increase value of Cruz Cash cards by providing \$11 value for \$10 cost, to encourage non-cash payments.

This scenario could reduce the gross revenue increase by \$16,000.

The following scenario is intended to create a fare product that staff feels will serve a specific demand.

- Scenario 5 – Creation of a 20-trip youth pass at a lower price than the monthly pass, because the monthly pass doesn't seem to match youth use patterns (i.e., occasional weekday school related trips). A pricing for this product has not yet been determined so potential revenue loss has yet not been calculated.

Again, adopting any of the above five scenarios would reduce the potential level of possible new revenue, as shown in Attachment B.

The premise of this last scenario is creating revenue to fund increased service.

- Scenario 6 – Currently the Hwy 17 Express 31-day pass is priced at approximately 50% discount (\$145), whereas most comparable commuter bus services provide only 25-33% discounts.

Additional funding of approximately \$79,000 to \$171,000 could fund 2-6 additional daily one-way trips in the Santa Cruz to San Jose corridor. It is not recommended to increase the current \$7 one-way fare.

Introduction of the types of fare payment methods discussed below would not only provide patrons financial incentives and additional convenience, but would also speed up the boarding process, which would reduce operating costs for METRO and improve on-time performance for patrons.

Passenger Fare Payment Technology

In addition to the strategies discussed above to reduce the financial impact of a base fare and passes increases, there is also the opportunity to improve customer convenience, amenity and experience through modernizing fare payment products and methods.

Basic passenger fare restructuring, such as raising the base passenger fare and adjusting the discount of a monthly pass, can be achieved without any change in passenger fare collection technology. However, in order for METRO to provide some passenger fare payment methods, improved technological features may be required.

These include:

- A. Mobile ticketing, which allows purchase of tickets on mobile devices and fast and efficient boarding; and,
- B. Account based systems, which allow customers to reload value to their various pass types remotely online in real time, which again contributes to decreased boarding time.

New passenger fare collection technology could be implemented concurrently with the passenger fare restructuring if desired, or at a later date. A staff recommendation on new fare collection technology would be made based on the necessity of the particular technological features to implement the desired fare payment and pricing strategies, along with implementation cost and timeframe considerations.

METRO is currently engaging technology vendors and analyzing the various new technological features being introduced at many of our peer transit agencies. At the

March Board meeting, staff will request approval to release a Request for Proposals to secure a vendor proposal for fare payment technology advances, to determine whether the costs are within METRO's capacity and the advances meet METRO's needs.

Community Outreach

In accordance with METRO policy and FTA regulations, METRO staff is currently conducting outreach with our customers, with regard to the topics discussed in this report, through:

- A. Face-to-face surveys at Pacific Station and Watsonville Transit Center; and,
- B. Online surveys specifically tailored to both local and Hwy 17 riders;

Staff requests the Board direct staff to initiate public outreach activities to discuss the concepts presented above, including:

- A. Speaking engagements with various stakeholder groups, such as representatives of the senior and disabled communities; and,
- B. A series of geographically oriented public open houses.

The goal of this outreach is to further understand passenger travel patterns and which passenger fare payment technology improvements would be most beneficial to our riders.

Process

Staff has initiated the following community outreach process in order to provide adequate time for public consideration prior to a final passenger fare restructuring decision May 2018 and the adoption of the METRO annual budget in June 2018:

- A. February through March 2018: Staff analysis and community engagement
- B. March 23, 2018: Preliminary staff recommendations to the Board
- C. March - May 2018: Formal Public comment process
- D. May 18, 2018: Public Hearing and possible Board adoption of revised Fare Policy
- E. January 2019: Possible implementation of revised fare structure and enhanced fare payment technology.

The public outreach process set forth above will also include a number of targeted efforts, which may include all or some of the following: bilingual onboard messages for customers, newspaper notices, a news release, and community meetings. In addition, presentations will be made to the METRO Advisory Committee (MAC), UCSC and Cabrillo College, which have service contracts with METRO. Finally, staff will reach out to community-based organizations to inform them of the proposed changes. Public comments/feedback will be shared with the Board.

IV. FINANCIAL CONSIDERATIONS/IMPACT

The initiation of a passenger fare restructuring analysis does not, in itself, have a financial impact, although outcomes of the process may result in initiatives that could have financial considerations, including increased passenger revenue and/or additional costs to provide improved fare technology tools.

V. ALTERNATIVES CONSIDERED

The alternative is to not perform long-range passenger fare restructuring analysis, by which we could be missing possible opportunities related to operating efficiencies, marketing and long-term budget planning. This is not recommended.

VI. ATTACHMENTS

- Attachment A1:** Total Revenue & Expenses FY12 – FY 22
- Attachment A2:** CPI Chart Updated 8-30-17
- Attachment B:** FY19 Fare Increase Scenarios

Prepared By: Barrow Emerson, Planning & Development Manager

VII. **APPROVALS:**

Barrow Emerson,
Planning & Development Manager

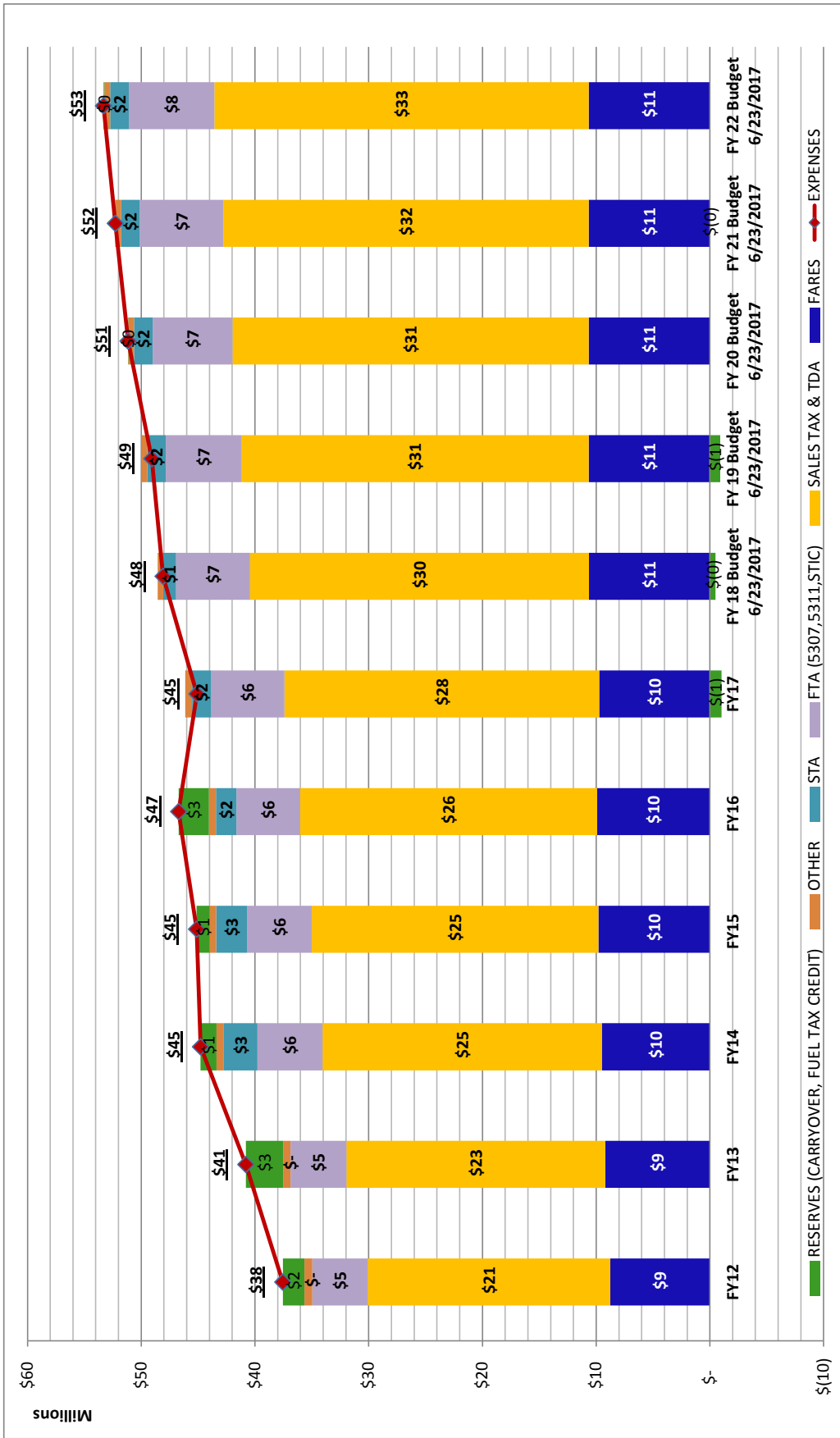


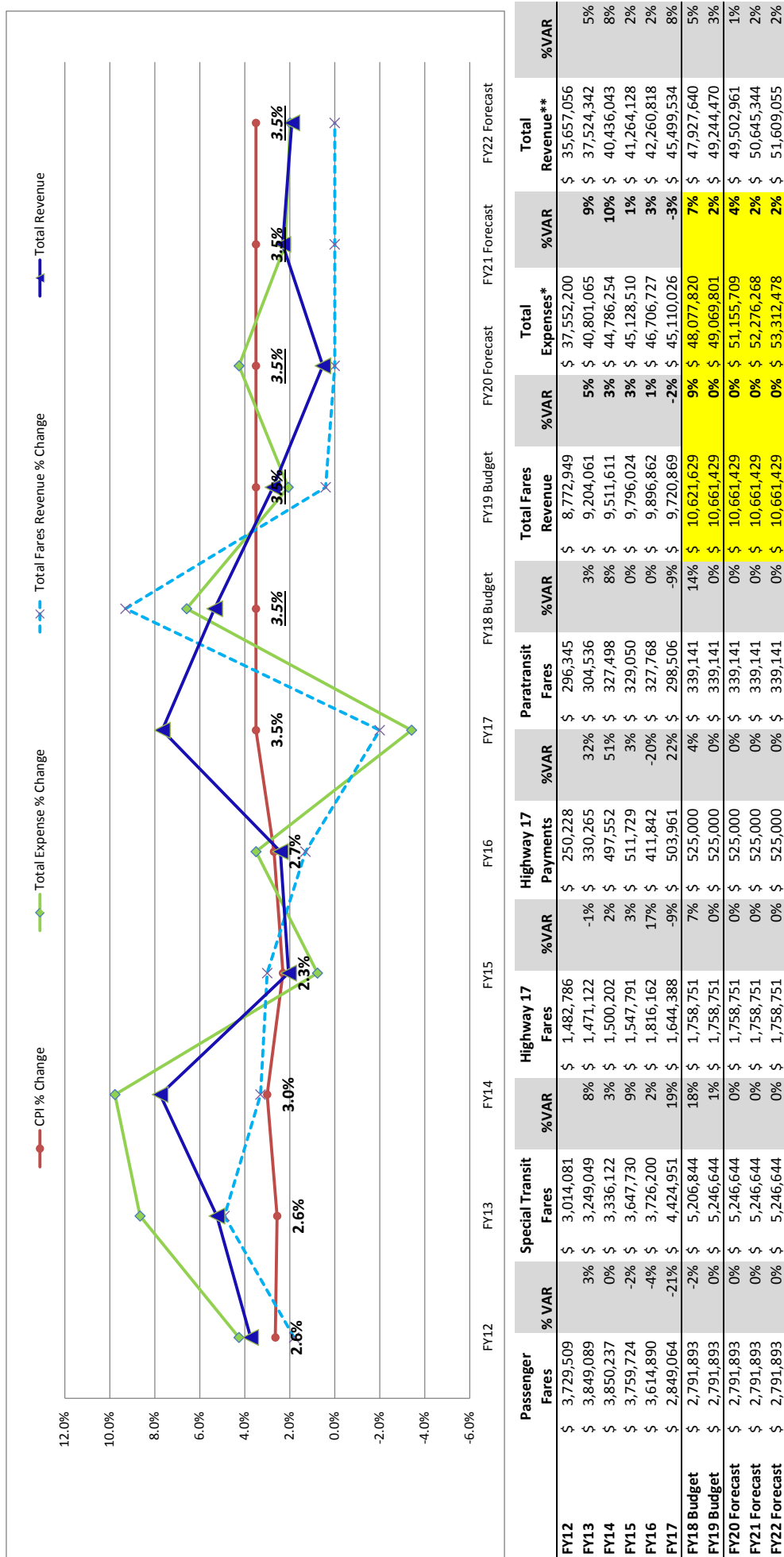
Approved as to fiscal impact:
Angela Aitken, Finance Manager

dlc for AA

Alex Clifford, CEO/General Manager







* Total Expenses do not include year-end Depreciation, W/C IBNR, GASB 45 OPEB adjustments, or GASB 68 Pension adjustments.

** Total Revenue does not include STA and TRANSFERS FROM RESERVES

FY19 Fare Increase Scenarios					
		Usage Figures	Gross Revenue Increase	Net Revenue Increase w/ Ridership Loss <small>*Assumed 5% for 25¢ scenarios and 10% for 50¢ scenarios</small>	Loss Compared to Base Scenarios
#	Scenarios				
	12.5% Increase on base fare and all passes (.25¢ base fare increase)	44% of boardings pay cash base fare	\$993,421	\$885,319	NA
	25% Increase on base fare and all passes (.50¢ base fare increase)		\$2,013,915	\$1,773,010	NA
1	12.5% base fare increase w/ 2.5x day pass value	9% of boardings use a day pass			\$60,516
	25% base fare increase w/ 2.5x Day Pass value				\$67,522
	12.5% base fare increase w/ 2x Day Pass value				\$121,032
	25% base fare increase w/ 2x Day Pass value				\$135,047
2	12.5% base fare increase w/o Changes to Current Passes	56% of boardings are w/ a pass			\$456,966*
	25% base fare increase w/o Changes to Current Passes				\$1,234,155*
3	12.5% base fare increase w/o Changes to Smartcard Fares	266,954 boardings occurred w/ smartcards in FY 17			\$56,928
	25% base fare increase w/o Changes to Smartcard Fares				\$93,388
4	10% Extra Value on Stored Cash Card Purchases	7,149 stored value cash cards sold in FY 17			\$15,855
5	12.5% base fare increase w/ 20 Ride Youth Pass	3,205 youth 31-day passes sold in FY 17			TBD
	25% base fare increase w/ 20 Ride Youth Pass				TBD
6	12.5% base fare increase ONLY ON LOCAL BUSES w/ HWY 17 31-Day pass value changed to 30x	28% of HWY 17 boardings occurred with a 31-day pass in FY 17			\$171,018 into service
	25% base fare increase ONLY ON LOCAL BUSES w/ HWY 17 31-Day pass value changed to 30x				\$171,018 into service
	12.5% base fare increase ONLY ON LOCAL BUSES w/ HWY 17 31-Day pass value changed to 25x				\$79,073 into service
	25% base fare increase ONLY ON LOCAL BUSES w/ HWY 17 31-Day pass value changed to 25x				\$79,073 into service

*Santa Cruz Metropolitan
Transit District*



DATE: March 23, 2018
TO: Board of Directors
FROM: Barrow Emerson, Planning & Development Manager
SUBJECT: RECOMMEND THE BOARD OF DIRECTORS TO HOLD IN ABEYANCE CONSIDERATION OF FARE RESTRUCTURING UNTIL LATE 2018

I. RECOMMENDED ACTION

That the Board of Directors, at its March 23, 2018 meeting, direct staff to hold in abeyance consideration of fare restructuring until late 2018

II. SUMMARY

- Santa Cruz Metropolitan Transit District (METRO) staff has been conducting analysis on fare restructuring for local and Highway 17 Express services, including opportunities for improved fare payment technology.
- At its February 23rd meeting, the Board of Directors received an initial Fare Restructuring analysis and directed staff to initiate a public outreach process.
- Because the Road Repair and Accountability Act of 2017 (SB-1) is facing a voter challenge, along with additional reasons discussed below, staff recommends that decisions related to fare modification be held in abeyance until November 2018, in order to understand more accurately METRO's revenue needs in the next few years.
- At its March 12, 2018 meeting, the Finance, Budget and Audit Standing Committee received, approved and forwarded the staff recommendation to the full board for their collective approval at the March 23, 2018 meeting.
- Staff will continue its initial community outreach efforts to gather input on fare restructure concepts as well as opportunities for fare technology upgrades.
- The formal public outreach scheduled for April will be rescheduled to later in the year once the path forward is determined for fare restructuring.

III. DISCUSSION/BACKGROUND

Background

As part of long term financial and service planning, METRO staff has been conducting analysis of passenger fare restructuring for local and Highway 17 Express services, including technological upgrades to fare payment methods.

At its February 23rd Board meeting, staff informed the Board that this analysis is necessary because of potential risks to future balanced budgets and the ability to

maintain a 20% farebox recovery ratio, which is a requirement of the Transit Development Act, one of METRO's significant funding sources from the State of California.

Among the significant issues that will affect METRO's future budget planning are:

- Resolution of the status of the Road Repair and Accountability Act of 2017 (SB-1), a major revenue source for METRO, which may undergo a repeal vote in November 2018.
- The results of the May 2018 UCSC student transportation fee ballot measure, which will determine the level of revenue which the University will be able to commit to METRO fixed route services with routes that serve UCSC in the upcoming years,
- Adoption of FY19 & FY20 METRO annual budget and 5-year plan, which would provide a more accurate context to forecast future revenue needs.
- Development of a fare payment technology upgrade plan, its implementation costs, and ongoing operational costs.

In addition, staff is developing a set of operational performance benchmarks, based on funding provider's requirements as well as peer agencies' performance standards, which will identify potential triggers that signify the need for additional revenue. As part of this effort, staff will also investigate the opportunity and potential value of establishing a fare policy that drives decisions as to when are modifications are necessary.

Community Outreach

Staff will continue its initial community outreach efforts to gather input on fare restructure concepts, as well as opportunities for fare technology upgrades.

This outreach includes:

- A. Online surveys specifically tailored to both local and Hwy 17 riders;
- B. Speaking engagements with various stakeholder groups, such as representatives of the senior and disabled communities; and,
- C. A series of geographically oriented public open houses.

The goal of this outreach is to further understand passenger travel patterns and which passenger fare payment technology improvements would be most beneficial to our riders.

Staff will not proceed with a formal outreach effort until it is determined later in the year that additional fare revenue is needed in the near term.

Upon further review and analysis of budgetary issues, staff recommends that decisions related to fare modifications be held in abeyance until later in 2018, to understand more accurately METRO's revenue needs in the next few years.

Process

Following Board direction, staff will continue its research into revenue needs, technology opportunities, and establishment of operational benchmarks, which would identify triggers that would identify the need for additional operating revenue. In addition, formal public outreach will proceed later in the year as discussed above.

IV. FINANCIAL CONSIDERATIONS/IMPACT

There is no financial impact in the short term, with decisions on fare restructuring and fare technology upgrades deferred until late 2018.

V. ALTERNATIVES CONSIDERED

The alternative is to continue forward at this time with fare restructuring without the benefit of the larger financial context discussed herein. This is not recommended.

VI. ATTACHMENTS

None

Prepared By: Barrow Emerson, Planning & Development Manager

VII. APPROVALS:

Barrow Emerson,
Planning & Development Manager



Approved as to fiscal impact:
Angela Aitken, Finance Manager



Alex Clifford, CEO/General Manager



DATE: February 23, 2017

TO: Board of Directors

FROM: April Warnock, Paratransit Superintendent

**SUBJECT: ACCEPT AND FILE THE METRO PARACRUZ OPERATIONS
STATUS REPORT FOR OCTOBER, NOVEMBER AND
DECEMBER 2017**

I. RECOMMENDED ACTION

That METRO's Board of Directors accept and file the quarterly METRO ParaCruz Operations Status Report for October, November, and December 2017.

II. SUMMARY OF ISSUES

- Summary review of monthly operational statistics for ParaCruz
- Summary of monthly operational information about ParaCruz

III. DISCUSSION/BACKGROUND

Comparing September 2017 statistics to October 2017, ParaCruz rides increased by 455 rides. Comparing October 2017 statistics to November 2017, ParaCruz rides decreased by 695 rides. Comparing November 2017 statistics to December 2017, rides decreased by 843 rides.

Comparing the monthly statistics of FY17 to the monthly statistics of FY18:

- In October, the number of ParaCruz rides increased by 140.
- In November, the number of ParaCruz rides decreased by 151.
- In December, the number of ParaCruz rides decreased by 179.

These month-to-month increases and decreases are consistent with annual monthly cyclical trends. METRO ParaCruz is the federally mandated ADA complementary Paratransit program of the Santa Cruz Metropolitan Transit District (METRO), providing shared ride, door-to-door demand-response transportation to customers certified as having disabilities that prevent them from independently using the fixed route bus.

IV. ALTERNATIVES

Not applicable.

V. COORDINATION

This staff report has been coordinated with statistics provided by the Finance and Fleet Departments. Additional data was provided by the Eligibility Coordinator.

VI. FINANCIAL CONSIDERATIONS

There are no financial considerations for this report.

VII. ATTACHMENTS

- | | |
|----------------------|--|
| Attachment A: | ParaCruz On-time Performance Charts for October, November, and December 2017 |
| Attachment B: | Comparative Operating Statistics Tables for October, November, and December 2017 |
| Attachment C: | Number of Rides Comparison Chart |
| Attachment D: | Shared vs. Total Rides Chart |
| Attachment E: | Mileage Comparison Chart |
| Attachment F: | Monthly Assessment |

Prepared By: April Warnock, Paratransit Superintendent

VIII. APPROVALS:

Ciro Aguirre, COO



Approved as to fiscal impact:
Angela Aitken, Finance Manager



Alex Clifford, CEO/General Manager



ParaCruz On-time Performance Report for October 2017.

	October 2016	October 2017
Total pick ups	6,856	6,996
Percent in “ready window”	82.41%	82.25%
1 to 5 minutes late	5.73%	6.23%
6 to 10 minutes late	4.30%	4.23%
11 to 15 minutes late	2.83%	2.47%
16 to 20 minutes late	1.76%	1.77%
21 to 25 minutes late	1.15%	1.24%
26 to 30 minutes late	.64%	.63%
31 to 35 minutes late	.50%	.59%
36 to 40 minutes late	.26%	.41%
41 or more minutes late (excessively late/missed trips)	.36%	.17%
Total beyond “ready window”	17.55%	17.75%

*Target: 95%

On-time Performance

During October, ParaCruz’ on-time performance (OTP) has risen slightly. However, OTP was slightly below the October 2016 OTP. Last month, on-time performance was at 81.87%, due to lack of staffing. The latest ParaCruz Operators (3), hired June 5, 2017, are now operating in revenue service. In compliance with the ParaCruz UTU MOU (13.02 Scheduling of Annual Leave), the fall bid decreased annual leave slots from four to three. The month of October does not contain any observed holidays, employees were available for work every day. At this time, ParaCruz has two Operators absent on long term disability. This put the number of available working ParaCruz Operators at twenty-two per weekday, not including pre-approved medical time off.

A Customer Service Report is either a compliment, comment or a complaint.

During the month of October 2017, ParaCruz received eight (8) Customer Service Reports. Four (4) of the reports were valid; one late pick-up, a booking error, a rude dispatcher, and an Operator being impatient with a client. Three (3) of the reports were not valid; a Operator did not show up for ride, a client who attempted to book a ride after the phone were cleared at 5 pm, a client who claimed the vehicle was too bumpy and she could not elevate her leg. One (1) of the reports was unverifiable, client claimed an Operator was rude.

ParaCruz On-time Performance Report for November 2017.

	November 2016	November 2017
Total pick ups	6,452	6,301
Percent in “ready window”	82.69%	85.10%
1 to 5 minutes late	6.20%	5.24%
6 to 10 minutes late	4.09%	4.08%
11 to 15 minutes late	2.88%	2.41%
16 to 20 minutes late	1.69%	1.46%
21 to 25 minutes late	.88%	.76%
26 to 30 minutes late	.51%	.32%
31 to 35 minutes late	.29%	.22%
36 to 40 minutes late	.22%	.27%
41 or more minutes late (excessively late/missed trips)	.54%	.14%
Total beyond “ready window”	17.31%	14.90%

*Target: 95%

On-time Performance

During November, ParaCruz' on-time performance improved 2.75% from last month. OTP was higher than November 2016. September 18, 2017 a new Operator was hired. He will be in training for approximately 5 weeks. ParaCruz continues to have two Operators absent on long term disability. The number of available working ParaCruz Operators continued to be twenty-two Operators available for week-days.

A Customer Service Report is either a compliment, comment, or a complaint.

During the month of November 2017, ParaCruz received four (4) Customer Service Reports. One (1) report was valid, a rude Operator. Three (3) of the reports were not valid, client claims an Operator did not come to lobby, another Operator no-showed a client, and a member of the general public claimed an Operator was speeding. ParaCruz' monitoring system (via Mobile Data Computer) did not support the claim.

ParaCruz On-time Performance Report for December 2017.

	December 2016	December 2017
Total pick ups	5,637	5,458
Percent in “ready window”	85.79%	86.06%
1 to 5 minutes late	4.52%	5.06%
6 to 10 minutes late	3.48%	3.59%
11 to 15 minutes late	2.18%	2.03%
16 to 20 minutes late	1.53%	1.30%
21 to 25 minutes late	.89%	.82%
26 to 30 minutes late	.76%	.60%
31 to 35 minutes late	.35%	.31%
36 to 40 minutes late	.30%	.09%
41 or more minutes late (excessively late/missed trips)	.20%	.13%
Total beyond “ready window”	14.21%	13.94%

*Target: 95%

On-time Performance

During December, ParaCruz' on-time performance increased for the third month in a row. December has a modest .96% increase from last month; an improvement over December 2016. The Operator hired in September continues training and is not in revenue service. ParaCruz continues to have two Operators absent on long term disability. This put the number of available working ParaCruz Operators at twenty-two per weekday.

A Customer Service Report is either a compliment, comment, or a complaint.

During the month of December 2017, ParaCruz received two (2) Customer Service Reports. One (1) of the reports was not valid; a member of the general public could not get past a ParaCruz vehicle that was deboarding a client, and had to wait. The other report (1) was a compliment for a ParaCruz Operator.

Comparative Operating Statistics through October 2017.

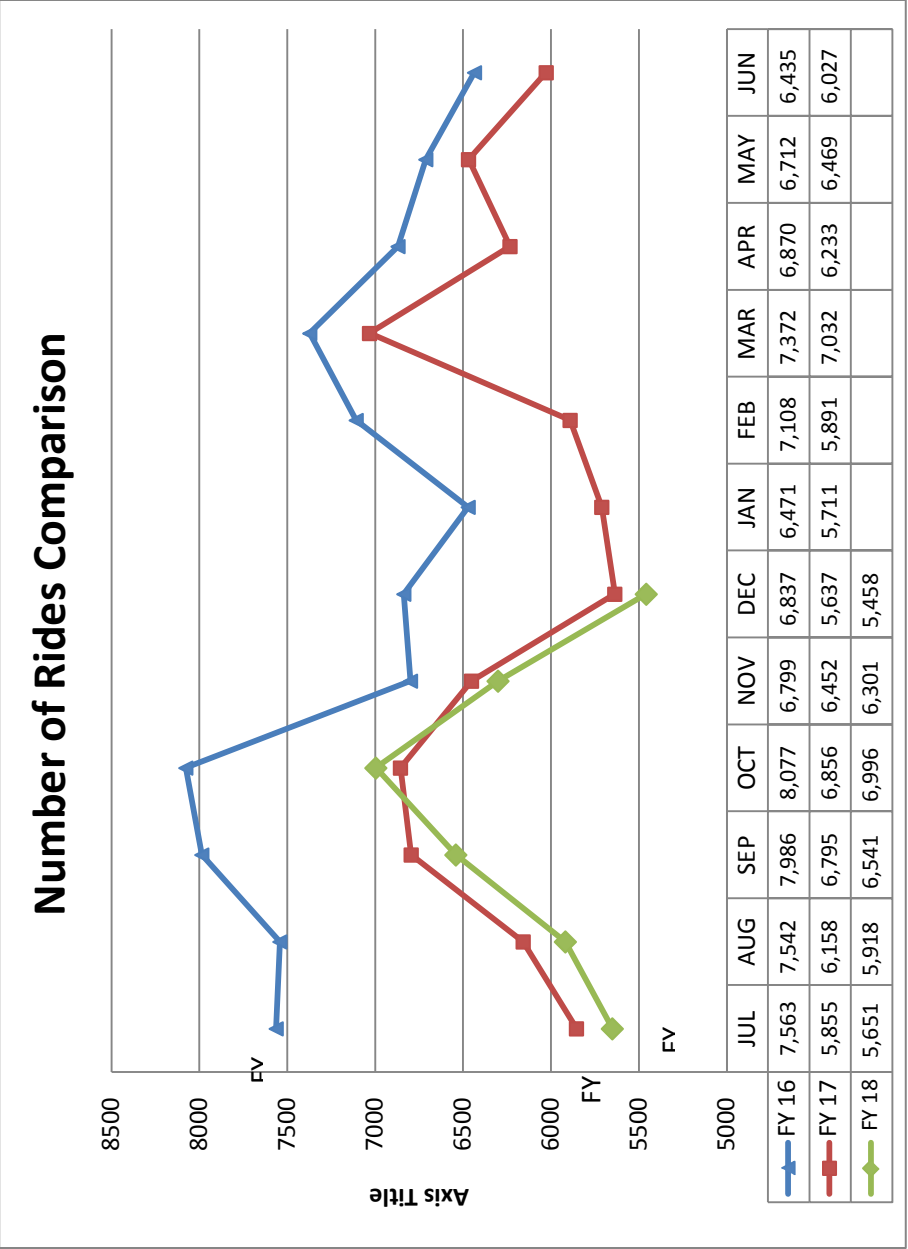
	October 2016	October 2017	FY 17	FY 18	Performance Averages	Performance Goals
Requested	7,624	7,795	28,488	28,002	7,795	
Performed	6,856	6,996	25,664	25,106	6,213	
Cancels	19.7%	18.95%	20.16%	20.67%	21.82%	
No Shows	3.50%	3.52%	3.42%	3.31%	3.34%	Less than 3%
Total miles	54,257	58,776	154,111	208,902	50,950	
Av trip miles	5.99	6.23	6.0	6.21	6.00	
Within ready window	82.45%	82.25%	85.88%	81.56%	82.32%	92.00% or better
Call center volume	N/A	5411	N/A	116,055	N/A	
Hold times less than 2 minutes	N/A	92.24%	N/A	N/A	N/A	Greater than 90%
Distinct riders	757	594	1206	975	594	
Most frequent rider	54 rides	50 rides	162 rides	188 rides	52 rides	
Shared rides	67.7%	58.0%	67.7%	58.0%	65.90%	Greater than 60%
Passengers per rev hour	1.97	1.95	1.97	1.96	1.96	Greater than 1.6 passengers/hour
Rides by supplemental providers	9.16%	N/A	7.55%	N/A	N/A	No more than 25%
Vendor cost per ride	\$21.35	N/A	\$23.63	N/A	N/A	
Rides < 10 miles	63.51%	62.91%	63.87%	63.69%	64.05%	
Rides > 10	34.49%	37.09%	36.13%	36.31%	35.95%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	25	12	48	143	31	
Excessively Long Trips	3	4	3	8	N/A	New Stat Jan 2017
# Trips at Base Fare	4,325	4,368	15,967	15,657	N/A	
# Trips > Base Fare	1,317	1,476	4,945	4,887	N/A	

Comparative Operating Statistics through November 2017.

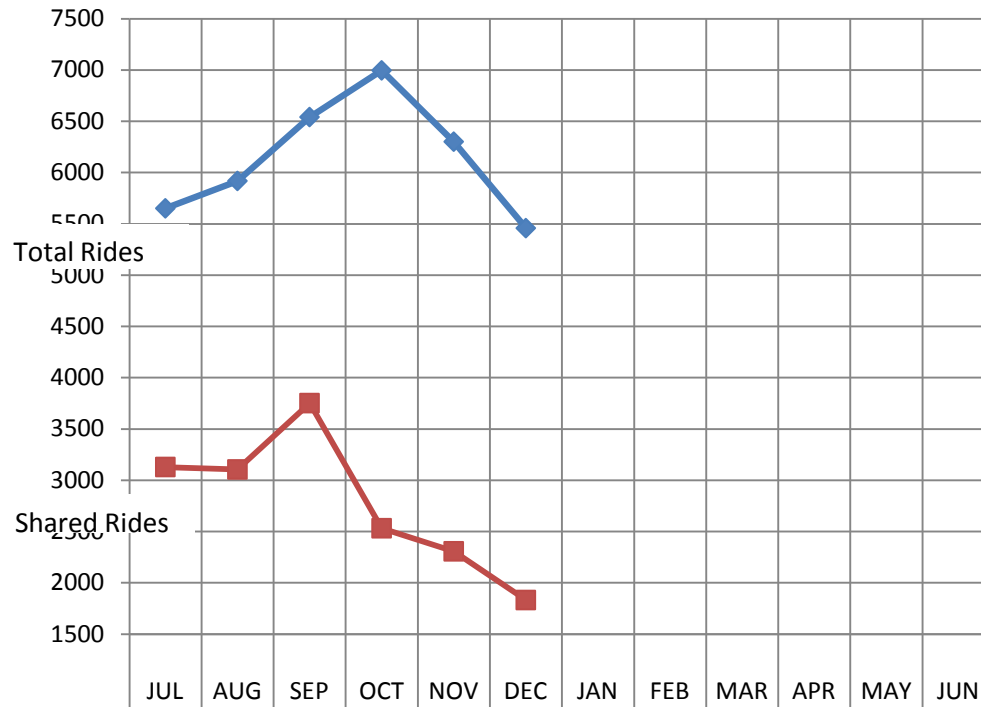
	November 2016	November 2017	FY 17	FY 18	Performance Averages	Performance Goals
Requested	7,545	7,493	36,033	35,495	6,500	
Performed	6,452	6,301	32,116	31,407	6,201	
Cancel	24.04%	22.25%	20.97%	21.01%	21.67%	
No Shows	3.29%	4.42%	3.39%	3.54%	3.43%	Less than 3%
Total miles	52,009	52,811	261,916	261,714	50,018	
Av trip miles	6.07	6.16	6.02	6.20	6.12	
Within ready window	82.69%	85.10%	85.23%	82.27%	82.52%	92.00% or better
Call center volume	4957	4961	N/A	21,016	N/A	
Hold times less than 2 minutes	N/A	90.69%	N/A	N/A	N/A	Greater than 90%
Distinct riders	727	585	1285	1061	679	
Most frequent rider	50 rides	45 rides	213 rides	220 rides	53 rides	
Shared rides	67.4%	57.6%	64.7%	57.9%	65.08%	Greater than 60%
Passengers per rev hour	1.96	1.88	1.96	1.94	1.92	Greater than 1.6 passengers/hour
Rides by supplemental providers	7.68%	N/A	7.58%	N/A	N/A	No more than 25%
Vendor cost per ride	\$22.27	N/A	\$23.34	N/A	N/A	
Rides < 10 miles	61.98%	63.66%	63.49%	63.68%	64.19%	
Rides > 10 miles	36.13%	36.34%	36.51%	36.32%	35.81%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	35	9	83	152	29	N/A
Excessively Long Trips	5	3	8	11	N/A	New Stat Jan 2017
# Trips Base Fare	3,976	4,021	19,943	19,678	N/A	
# Trips > Base Fare	1,304	1,293	6,249	6,180	N/A	

Comparative Operating Statistics through December 2017.

	December 2016	December 2017	FY 17	FY 18	Performance Averages	Performance Goals
Requested	6,680	6,564	42,713	42,059	6,996	
Performed	5,637	5,458	37,753	36,865	6,121	
Cancel	24.15%	24.28%	21.47%	21.52%	22.21%	
No Shows	3.47%	4.19%	3.40%	3.23%	3.36%	Less than 3%
Total miles	47,522	47,551	309,438	309,265	50,208	
Av trip miles	6.02	6.36	6.04	6.22	6.10	
Within ready window	85.79%	86.06%	85.32%	82.83%	82.88%	92.00% or better
Call center volume	N/A	4553	N/A	25,569	N/A	
Hold times less than 2 minutes	N/A	94.47%	N/A	N/A	N/A	Greater than 90%
Distinct riders	701	591	1348	1141	700	
Most frequent rider	45 rides	43 rides	240 rides	246 rides	51 rides	
Shared rides	64.2%	52.5%	64.6%	57.1%	65.68%	Greater than 60%
Passengers per rev hour	1.86	1.84	1.86	1.93	1.92	Greater than 1.6 passengers/hour
Rides by supplemental providers	6.38%	N/A	7.38%	N/A	N/A	No more than 25%
Vendor cost per ride	\$24.52	N/A	\$23.51	N/A	N/A	
Rides < 10 miles	64.70%	65.30%	63.67%	63.92%	64.35%	
Rides > 10 miles	35.40%	34.70%	36.33%	36.08%	35.65%	
Denied Rides	0	0	0	0	0	Zero
Missed Trips	11	7	94	159	29	N/A
Excessively Long Trips	5	1	13	12	N/A	New Stat Jan 2017
# Trips Base Fare	3,604	3,493	23,547	23,171		
# Trips > Base Fare	1,061	1,053	7,310	7,233		



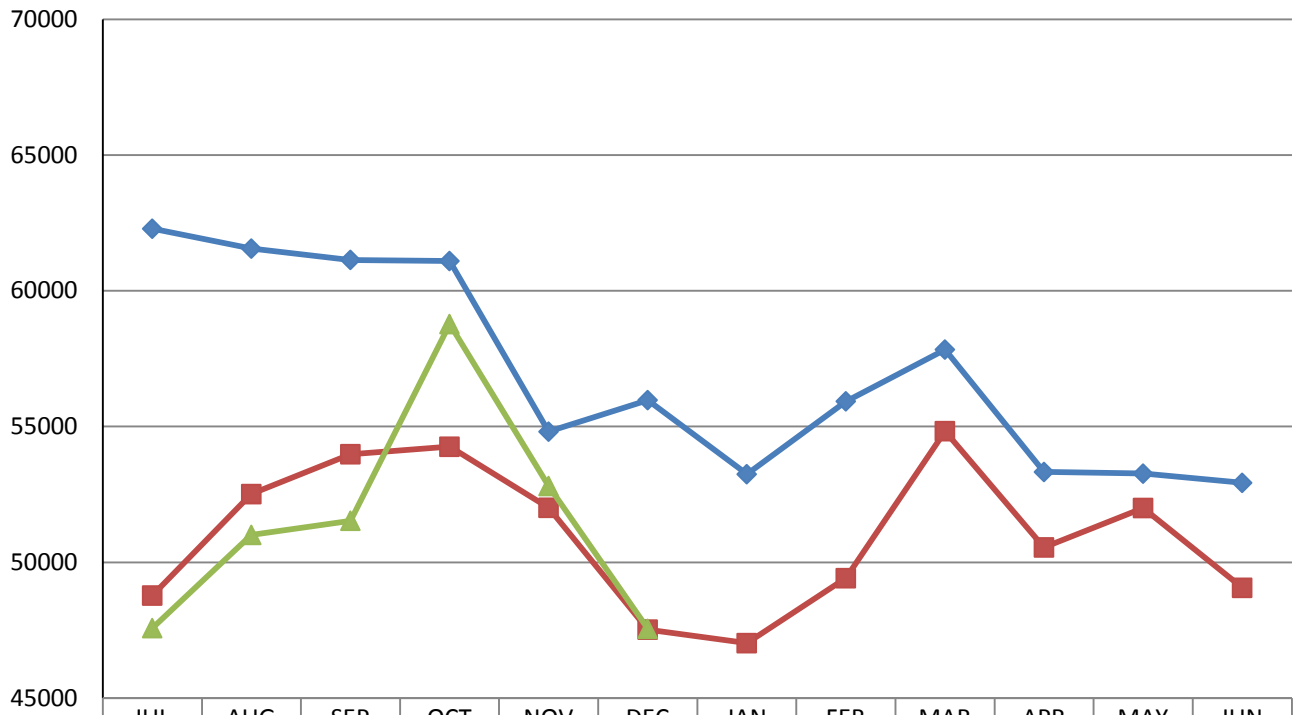
Total Ride vs. Shared Ride Count



Total Rides	5651	5918	6541	6996	6301	5458						
Shared Rides	3129	3105	3752	2532	2307	1832						

◆ Total Rides
■ Shared Rides

Annual Miles Comparison



Monthly Assessments

	UNRESTRICTED	RESTRICTED CONDITIONAL	RESTRICTED TRIP BY TRIP	TEMPORARY	DENIED	TOTAL
JANUARY 2017	50	0	1	1	0	52
FEBRUARY 2017	27	0	0	2	0	29
MARCH 2017	50	0	0	1	0	51
APRIL 2017	22	0	0	3	0	25
MAY 2017	22	0	0	2	1	25
JUNE 2017	36	0	1	1	0	38
JULY 2017	37	0	0	3	0	40
AUGUST 2017	37	0	0	2	0	39
SEPTEMBER 2017	42	0	1	1	0	44
OCTOBER 2017	30	0	2	2	0	34
NOVEMBER 2017	21	0	0	0	0	21
DECEMBER 2017	29	0	0	1	0	30

Number of Eligible Riders for the month of October 2017 = 3,629

Number of Eligible Riders for the month of November 2017 = 3,646

Number of Eligible Riders for the month of December 2017 = 3,704

TO: Elderly and Disabled Transportation Advisory Committee (E&D TAC)
FROM: Grace Blakeslee, Transportation Planner
RE: Elect Committee Chair and Vice Chair

RECOMMENDATIONS

Staff recommends that the E&D TAC solicit nominations, then elect a chair and vice chair for the committee for a period of one or two years.

BACKGROUND

Below is an excerpt from the RTC/Committee's rules and regulations:

A Chairperson and Vice Chairperson for each Committee shall be elected to serve for a term of one year. The Committee shall elect its officers at the first meeting following the March SCCRTC meeting of every year. Election shall be by a roll call vote. The Chairperson shall preside at all meetings of the Committee. The Chairperson shall maintain order and decorum at the meetings, decide all questions of order, and announce the Committee's decisions. The Vice Chairperson shall perform the duties of the Chairperson in his or her absence. In the event both officers are absent from the Committee, the majority of quorum may appoint a presiding officer for that meeting. All officers shall continue in their respective offices until their successors have been elected and have assumed office.

DISCUSSION

At the April 10 meeting, nominations for chair and vice chair will be solicited. Members may self nominate. An election will be held, and the chair will begin presiding immediately.

Staff recommends that the E&D TAC solicit nominations, then elect a chair and vice chair for the committee for a period of one or two years.

TO: Elderly and Disabled Transportation Advisory Committee (E&D TAC)
FROM: Grace Blakeslee, Transportation Planner
RE: The Village Santa Cruz

RECOMMENDATIONS

For Information Only.

BACKGROUND

A Guide to Specialized Transportation Services for Seniors and People with Disabilities in Santa Cruz County is published by the RTC. Copies are available in English and Spanish. Larger print versions are also available. The Guide lists all known accessible transportation services available in Santa Cruz County. At the February 13, 2018 meeting, the E&D TAC discussed updates to the Guide for Specialized Transportation, including adding information about transportation services for seniors provided by the Village Santa Cruz program volunteers.

DISCUSSION

The Village Santa Cruz is a non-profit, grassroots membership organization made up of a network of Santa Cruz city and county residents with a vision of aging as an active, empowering time of growing and learning, as important and meaningful as any other time of our life. Jessica Bukowski, Village Outreach Coordinator, will provide an overview of the Village Santa Cruz program and their transportation services.

I:\E&DTAC\2018\2018-April-10\14_Presentationfrom the Village.docx

TO: Elderly & Disabled Transportation Advisory Committee
FROM: Grace Blakeslee, Transportation Planner
RE: Draft 2018 Unmet Paratransit and Transit Needs List

RECOMMENDATION

Staff recommends that the Elderly & Disabled Transportation Advisory Committee review the *Draft 2018 Unmet Paratransit and Transit Needs List* ([Attachment 1](#)), provide amendment as necessary and forward the list to the RTC for their consideration at an advertised public hearing on May 3, 2018.

BACKGROUND

Local sales taxes in the amount of ¼ cent per dollar are collected by the State and allocated to the region according to the Transportation Development Act (TDA). The Regional Transportation Commission (RTC) allocates these funds according to formula as adopted in its Rules and Regulations. The majority of TDA funding is apportioned to the Santa Cruz Metropolitan Transit District. Other amounts are apportioned to Community Bridges, the Volunteer Center and to local jurisdictions for bicycle and pedestrian projects.

TDA statutes require transportation planning agencies allocating TDA funds to local streets and roads, to implement a public process, including a public hearing, to identify unmet transit needs of transit dependent or disadvantaged persons, and determine if unmet transit needs can be reasonably met. TDA statutes also require transportation planning agencies to consult with their designated social services transportation advisory councils to annually identify transit needs. Although the RTC does not allocate TDA funds to local streets and roads, and therefore is not required to perform this analysis, the RTC endeavors to solicit regular input on unmet transit and paratransit needs to provide a useful tool to assess and prioritize needs in the region. The *Unmet Needs List* related to paratransit and transit needs is used to prioritize projects as funds become available.

DISCUSSION

Serving as the social services transportation advisory council, the E&D TAC regularly hears and considers unmet paratransit and transit needs in Santa Cruz County. Unmet paratransit and transit needs are those transportation requests which are not being met by the current public transit system, a transportation request that has community support, and transportation request that does not duplicate transit services provided publically or privately.

The E&D TAC considered the *Preliminary Draft 2018 Unmet Paratransit and Transit Needs List* at the February 13, 2018 meeting. The *Preliminary Draft 2018 Unmet Paratransit and Transit Needs* list reflects the adopted *Unmet Needs List* completed in 2017.

The *Draft 2018 Unmet Paratransit and Transit Needs List* is included as Attachment 1. Revisions from the *Preliminary Draft* to the *Draft* are shown using underline and strikeout and reflect recommendations made by the E&D TAC at their December 10 and February 13, 2018 meetings, comments from Santa Cruz Metro and Community Bridges staff, and input from members of the public, and RTC staff.

Staff recommends that the Elderly & Disabled Transportation Advisory Committee (E&D TAC) provide input on the *Draft 2018 Unmet Paratransit and Transit Needs List (Attachment 1)* and recommends the Regional Transportation Commission adopt the *Final 2018 Unmet Paratransit and Transit Needs* list following a public hearing on May 3, 2018. RTC staff also recommends that the E&D TAC identify one or two areas to focus on addressing in 2018.

SUMMARY

TDA statutes require transportation planning agencies to consult with their designated social services transportation advisory councils to annually identify transit needs. Although the RTC does not allocate TDA funds to local streets and roads, and therefore is not required to perform an analysis of unmet transit needs, the RTC endeavors to solicit regular input on unmet paratransit and transit needs to provide a useful tool to prioritize needs in the region. RTC staff recommends that the E&D TAC provide input on the *Draft 2018 Unmet Paratransit and Transit Needs List*, and recommends the Regional Transportation Commission adopt the *Final 2018 Unmet Paratransit and Transit Needs* list following a public hearing on May 3, 2018.

Attachment 1: *Draft 2018 Unmet Paratransit and Transit Needs List*

Draft

2018 Unmet Paratransit and Transit Needs

Prioritization of Need:

H - High priority items are those items that fill a gap or absence of ongoing of service.

M - Medium priority items that supplement existing service.

L - Low priority items should become more specific and then be planned for, as funds are available.

1-3 Graduated scale indicates to what extent the need, if addressed, would: increase the number of individuals who are within a 30 minute transit trip to key destinations; improve safety; support economic vitality by way of decreasing transportation costs; or, improve cost-effectiveness of transportation services.

Strategies:

- Proposals and suggestions to address need, including programs and projects.

General

1. **H1** - Safe travel paths between senior and/or disabled living areas, medical facilities, educational facilities, employment locations, retail centers, entertainment venues, and/or bus stops, and/or railroad crossings.
 - Improve accessibility at and to bus stops - such as, but not limited to, sidewalk and crosswalk improvements connecting destinations frequented by senior and disabled individuals and transit stops such as, but not limited to, those identified in the RTC Safe Paths of Travel Final Report.
 - Secure funding assistance to make Safe Paths of Travel improvements.
 - Expand publicity regarding sidewalk maintenance.
2. **H1** -Transportation services to areas with high concentrations of seniors, disabled and low income individuals, particularly in south county.
 - Support alternative transportation programs, such as vanpool programs, serving low income and senior housing areas outside of the transit service area in south county.
 - Explore pilot projects, such as regularly scheduled paratransit trips two-three times per week, to serve residents.
 - Secure funding for taxi voucher programs for senior and low income individuals.
 - Provide affordable and desirable housing for seniors and low income individuals within transit service area.

- Provide incentives for senior and social services to be located in transit service areas.
 - Seek volunteer drivers to provide transportation services.
 - Evaluate on-demand transit services.
3. **H3** - Transportation services for low-income families with children, including transportation for people transitioning from welfare to work.
- Support welfare to work programs and training programs.
 - Support transportation programs dedicated to serving low-income families with children.
 - Seek volunteer drivers for transportation family members to visits at detention facilities.
 - Provide taxi vouchers to low income families.
 - Reinstate ride to work programs.
 - Provide youth bus passes to low income households
4. **H13** - Transportation services for caregivers of senior and disabled clients.
- Support programs providing transportation for caregivers to clients.
 - Provide taxi voucher to caregivers.
 - Reinstate ride to work programs.

Paratransit/Specialized Transportation Services

5. **H1** - Coordinated and seamless-to-the-public system of specialized transportation with a Mobility Management Center (central information point, one stop shop).
- Assess feasibility and seek funds for development/start-up of the center, and assess entities already providing information and referral services).
 - Utilize information technology solutions to provide transit information that is accessible to all users.
6. **H1** - Paratransit service for the people who lost paratransit service due to changes in Santa Cruz Metro ParaCruz program in 2015.
- Support policies that expand ADA mandated paratransit service area.
 - Support programs providing specialized transportation to areas outside the ADA-mandated paratransit service area for a fee or at no cost.
 - Expand taxi voucher program.
7. **MH1** – Access to paratransit services on all holidays.
- Extend existing paratransit services to holidays.
 - Support taxi voucher programs.

8. **H2**- Specialized transportation for areas outside the ADA-mandated paratransit service area for medical, non-medical trips.
 - Secure funding for taxi voucher programs.
 - Provide affordable and desirable housing for seniors and disabled individuals within ADA paratransit service area.
 - Provide incentives for senior and social services to be located in transit service areas.
 - Support programs providing specialized transportation to areas outside the ADA-mandated paratransit service area for a fee or at no cost.
 - Support continuous funding for transportation to medical services.
 - Seek volunteer drivers to provide transportation services from areas not served by transit or ADA paratransit service.
 - Identify priority origins and destinations outside the ADA service area.
9. **H12**-Free or low cost paratransit options.
 - Provide funding for programs that provide discounted and free paratransit rides.
10. **H2** - Direct paratransit and accessible transit connections with neighboring counties- including Monterey (Pajaro), San Benito, Santa Clara and other points north.
 - Establish direct inter-regional fixed route accessible transit service.
 - Provide inter-regional specialized transportation.
 - Develop plan to coordinate between agencies providing specialized transportation services in neighboring counties.
 - Support programs providing inter-regional specialized transportation for a fee or at no cost.
 - Support continuous funding for specialized transportation services to out-of-county medical appointments.
 - Establish feeder services to inter-regional accessible transit services.
11. **MH13** - Affordable transportation for dialysis and other medical appointments, including 'same day' specialized transportation services for medical trips, on a continuous basis.
 - Support continuous funding for 'same day' transportation to medical services.
 - Support continuous funding for no or low-cost specialized transportation to medical appointments.
 - Increase capacity of existing programs providing transportation to dialysis and other medical appointments.
 - Secure funding for taxi voucher programs.

12. **M2** - Transportation for programs that promote senior and disabled individuals health, safety and independence including, but not limited to, all senior meal sites in the county, the stroke centers and senior activity centers
- Support continuous funding for transportation services to meal sites.
 - Support continuous funding for paratransit services to medical service centers.
 - Support volunteer drivers to provide transportation services.
 - Support transportation services to senior activity centers such as Elderday.

13. **M2** –Conduct targeted outreach to seniors to provide information about transportation options and safety.

- Provide safe driving and transit information at locations with concentrations of seniors.
- Support field trips to events by bus ("Bus by Choice" model)

- ~~13.~~14. **M2** - Publicity about existing specialized transportation services including ADA paratransit, non-ADA paratransit, taxi services, Medi-Cal rides and mobility training for people to use regular fixed route buses.
- Streamline communication activities by establishing a central point of contact within health providers to disseminate information about specialized transportation services.
 - Support continuous funding for communication and outreach activities.

- ~~14.~~15. **HM2** - Volunteer drivers in Santa Cruz County particularly in south-county.
- Expand outreach efforts to recruit drivers and promote services.
 - Support for the Volunteer Center Transportation Program.

- ~~15.~~16. **M2** - Affordable special care trips and gurney vehicle for medically fragile individuals and those needing "bed to bed" transportation.
- Provide vouchers for specialized care trips.
 - Identify a service provider for gurney trips and assist in procurement of a vehicle for services.
 - Partner with assisted living and hospice care to provide services.
 - Publicize availability of services, if available.

- ~~16.~~17. **M3** - Ongoing provision of ADA Paratransit certification, provided by Santa Cruz Metro, at group facilities.
- Provide on-site services to reach a greater number of individuals.

~~17.18.~~ **M3**- Specialized transportation services for people living with a cognitive impairments, dementia or mental health diagnosis.

- Provide on demand transportation services for people living with a mental health diagnosis.
- Provide services designated to assisting people with mental illness navigate transit and paratransit eligibility requirements.

~~18.19.~~ **L2** - Specialized transportation for 'same day' low cost non-medical trips.

- Expand taxi voucher program.
- Support "on-call" volunteer drive programs.

~~19.20.~~ **L3** - Anticipate growing demand for services by projecting funding needs for specialized transportation (including fixed route, ADA and non-ADA Paratransit) to provide transportation services to the senior population expected to increase over the next 15 to 30 years.

- Identify funding needs for paratransit over a 15-30 year horizon.
- Designated funding source for paratransit service.

Paratransit/Specialized Transportation Capital

~~20.21.~~ **H2**- ParaCruz operating facilities.

- Acquire and develop permanent operation and maintenance facility for ParaCruz to accommodate increased fleet size and growth in future service.
- Increase funding opportunities for paratransit capital projects.

~~21.22.~~ **H2** - Consolidated Transportation Services Agency operating facilities.

- Acquire and develop permanent operation and maintenance facilities for Consolidated Transportation Services Agency.
- Increase funding opportunities for paratransit capital projects.

~~22.23.~~ **H2** - Paratransit vehicle replacements.

- Increase funding opportunities for paratransit capital projects

Transit Services

~~23.24.~~ **H1** – Greater frequency and span of transit service in densely populated areas with a mix of land uses land uses.

- Increase Live Oak Service-Enhance service in Capitola.
- Enhance service on Mission Street.

- Extend transit service hours later in the evening and early in the morning serving commercial centers of Santa Cruz/Live Oak/Cabrillo/Watsonville.

| ~~24.25.~~ **M1** –More transit service to UCSC.

- Increase weekend and weekday UCSC service.

| ~~25.26.~~ **M1** - More interregional and cross county transit services.

- Increase Hwy 17 weekend service frequency.
- Provide transit service from Santa Cruz County to Los Gatos.
- Provide direct transit service to San Jose Airport.
- Enhance Monterey County to Santa Cruz County service.

| ~~26.27.~~ **M1** – Free and Low-cost transit options.

- Support programs that provide transportation services, including, but not limited to bus services, for a reduced or no fee.
- Seek volunteer drivers to provide transportation services.
- Support programs that allow seniors and disabled individuals to ride free during designated time periods.

| ~~27.28.~~ **M2** – More transit service between primary destinations in Santa Cruz County.

- Provide service between Capitola Mall and Cabrillo.
- Expand transit service to new residential and commercial areas in Watsonville.
- Improve north - south transit connections (ex. Bay/Porter).

| ~~28.29.~~ **M2**- Access to transportation services on all holidays.

- Provide regular Santa Cruz Metro on holidays.
- Support taxi voucher programs.
- Support volunteer transportation services.

| ~~29.30.~~ **M2**- Easier and faster transit trips system wide.

- Enhance connections through increasing the span and frequency of service.

| ~~30.31.~~ **M2**- Faster run times on transit routes.

- Investigate opportunities for transit priority.
- Consider direct services between more locations, reducing need for transfers.

| ~~31.32.~~ **M2** -Intra-community service in Santa Cruz County communities.

- Develop San Lorenzo Valley circular.
- Develop Scotts Valley circular.

- Investigate need for intra-community and neighborhood transit services

~~32.33.~~ **L2-** Transit service to major tourists destinations.

- Provide transit service to Waddell Creek and North Coast and Highway 17 direct service to Boardwalk on weekends.

~~33.34.~~ **L2** - Commuter transit service.

- Extend Highway 17 service to Watsonville, or improve connections between Watsonville-Santa Cruz service and Highway 17 service.
- Provide commute option for transit riders between SLV and Santa Cruz faster.

~~34.35.~~ **L3-** Special event services.

- Establish program to coordinate with Santa Cruz Visitor Center and partner agencies to provide special event services.

Transit Capital

~~35.36.~~ **H2** – ADA accessible bus stops.

- Provide ADA compliant bus stops.
- Prioritize bus stop improvements and shelter replacement based on high usage by seniors and people with disabilities.
- Install braille and raised numbers on bus signage at bus stops indicating which bus routes are being offered at each stop (or a technology-based way finding alternative).

~~36.37.~~ **H1** –Maintenance of existing transit facilities.

- Support funding for maintenance of bus stops, parking lots, transit centers, buildings.

~~37.38.~~ **H1** –Bus replacement: Replace buses beyond useful life as needed including buses, including buses providing rural service.

- Support funding for transit capital improvements.

~~38.39.~~ **M1** - Transit station improvements.

- Investigate options for renovation or redevelopment of Santa Cruz Metro Center.
- Complete Watsonville Transit Center Improvements.
- Coordinate improvements to Capitola Transit Center with Capitola Mall

~~39.40.~~ **H2** - Faster transit travel times.

- Installation of transponders on all buses for signal priority on major corridors improving traffic flow, reducing travel time, and improving on-time performance.

~~40.41.~~ **H3** - New equipment to assist with real-time operations, security, scheduling and planning.

- Automated Vehicle Location (AVL) System to provide better monitoring of on-time performance and more accurate data reporting.
- Automatic Passenger Counting system to make mandatory reporting more efficient and improve data for service planning.
- Install audio and video surveillance system for all buses

~~41.42.~~ **M3** – More multimodal connections to transit.

- Construct park and ride lots in strategic locations along inter-city routes that lack adequate feeder service.
- Consider partnerships with ride-hail services for first/last mile connections.
- Bike lockers and/or bike share stations at key locations to facilitate first/last mile of travel.

~~42.43.~~ **M3** - Wifi expansion on buses.

- Install wifi equipment at all facilities and on all buses.
- Partner with private companies to provide wifi

43. **M1**- Automated phone-based trip planning providing Metro route information and or trip planning coordination via telephone and voice activated menu.

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AGENDA: April 10, 2018

TO: Elderly & Disabled Transportation Advisory Committee

FROM: Grace Blakeslee, Transportation Planner

RE: FY 2018-19 Transportation Development Act Funds for Volunteer Center

RECOMMENDATION

Staff recommends that the Elderly & Disabled Transportation Advisory Committee review the FY 2018-19 claim from the Volunteer Center in the amount of \$82,747 and recommend approval by the Regional Transportation Commission, contingent upon approval by the City of Santa Cruz to act as their claimant.

BACKGROUND

The Regional Transportation Commission (RTC) allocates Transportation Development Act (TDA) funds from the region's ¼ cent share of the state's 7.5 cent sales tax according to state law and established formulas in the Commission's Rules and Regulations. The RTC's FY 2018-19 draft budget was considered by the RTC Budget and Administration Personnel Committee (B&A/P) in March 2018 and includes TDA allocations based on the Santa Cruz County Auditor's estimates. The B&A/P recommends that the RTC adopt the RTC FY 2018-19 budget at the April 5, 2018 RTC meeting.

DISCUSSION

The Regional Transportation Commission (RTC) drafted a FY 2018-19 budget including Transportation Development Act (TDA) allocations for the Volunteer Center in the amount of \$82,747.

The Volunteer Center's TDA Claim Form, scope of work and budget based on the RTC's approved budget are attached ([Attachment 1](#)). The Volunteer Center has a goal to use TDA funds to provide approximately 4,600 one-way trips to eligible clients in FY 2018-19. The Volunteer Center prioritizes trips based on type and income. Because this program uses volunteer drivers, it is a highly cost effective method of providing rides with an average cost per ride of \$8.12. Volunteer Center staff will provide an overview of their TDA funded transportation services at the meeting and will be available to answer questions. The Volunteer Center will request that the City of Santa Cruz, as a local jurisdiction, act as the claimant.

Staff recommends that the E&D TAC approve the TDA claim for the Volunteer Center, and recommend RTC approval at their May 3, 2018, contingent upon approval by the City of Santa Cruz to act as the claimant meeting.

SUMMARY

The E&D TAC annually reviews Transportation Development claims for the Volunteer Center, Community Bridges and the Santa Cruz Metro, to ensure that these funds are allocated in accordance with TDA requirements and community needs, and makes recommendations regarding approval of the claims to the Regional Transportation Commission.

Attachment 1: FY 2018-19 Volunteer Center TDA Claim and operation/budget pages

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Transportation Development Act (TDA) – Local Transportation Funds CLAIM FORM

Submit a separate form for each project.

This form has been developed in an effort to standardize information required from TDA recipients, based on TDA Statute, RTC Rules and Regulations, and/or RTC board requests.

If you have any questions about this claim form or would like an electronic copy of the form, please contact the Santa Cruz County Regional Transportation Commission at 460-3200.

Project Information

1. Project Title: Transportation Program
2. Implementing Agency: Volunteer Center of Santa Cruz
3. Sponsoring Agency (if different) Must be a TDA Eligible Claimant:
4. Funding requested this claim: TDA \$0
 STA (transit only) \$ 82,747
5. Fiscal Year (FY) for which funds are claimed: FY 2018-2019
6. General purpose for which the claim is made, identified by the article and section of the Act which authorizes such claims:

<input type="checkbox"/> Article 8 Bicycle and/or Pedestrian Facility	<input checked="" type="checkbox"/> Article 8 Specialized Transportation
<input type="checkbox"/> Article 4 Public Transportation	<input type="checkbox"/> Article 3 & 8 TDA Admin or Planning
7. Contact Person/Project Manager
Name: Tara Ireland
Telephone Number: 831-427-5070 E-mail: rsvpvol@scvolunteercenter.org
Secondary Contact (in event primary not available) Alicia Dayton
Telephone Number: 831-427-5070 E-mail: scruez@scvolunteercenter.org
8. Project/Program Description/Scope (use additional pages, if needed, to provide details such as work elements/tasks. See attached scope of work
9. Project Location/Limits (attach a map and/or photos if available/applicable, include street names):
All of Santa Cruz County
10. Justification for the project. (Why is this project needed? Primary goal/purpose of the project; problem to be addressed; project benefits; importance to the community)

The Volunteer Center offers the only program in Santa Cruz County with no cost rides to seniors and disabled persons. We provide these services at no cost to the clients by mobilizing community volunteers that use their own vehicles to transport clients to needed services. Our priority service destinations are medical appointments, grocery shopping and "other rides", which are based on needs and availability of drivers. The program offers volunteers additional insurance and a small mileage allowance. The Service covers all of Santa Cruz County including some of the remote areas in San Lorenzo Valley and South County.

Our services are available to elderly and disabled persons outside of fixed bus routes, who cannot use public transit because of mobility issues or do not qualify or cannot afford services from Lifeline

or taxis. The services we provide fall within the high and medium priorities of the 2017 Unmet Para transit and Transit Needs, Adopted by the Santa Cruz County Regional Transportation Commission.

Clients and volunteer drivers are actively recruited in several ways. Through our website, brochures placed at various doctors office and areas where senior congregate, ads placed in local news, presentations to local service clubs and senior centers. In addition, our relationships with other agencies such as Visiting Nurses, Dominican Rehab and our own programs, Retired Senior Volunteer Program and Helping Hands, provide us with clients as well as volunteers.

11. Project Productivity Goals for this fiscal year:

a. Measures of performance, success or completion to be used to evaluate project/program (ex. increase use of facility/service, decrease collisions, etc.): The number of rides provided and the number of clients served will measure performance. Clients register with the program and individual records are kept on each client with their personal information, emergency contacts and rides given. The number of rides is evaluated through ride reports compiled on each ride that details client, date and time of ride, destination of ride and driver providing ride. These records are entered into a computerized data file.

b. Number of people to be served/anticipated number of users of project/program (ex. number of new or maintained bike miles; number of people served/rides provided): Our goal is to provide 4,600 one-way trips to eligible clients. Clients are limited to two rides per week due to the availability and number of drivers. Once all essential rides are filled clients may have additional rides. Clients are asked to give advance notice of one week for rides requests. To be able to expand these goals more volunteer drivers are needed. Our priority for filling requests is as follows:

- 1st Priority - Medical trips for low-income persons
- 2nd Priority - Medical trips for other persons
- 3rd Priority - Shopping for low-income persons
- 4th Priority - Shopping for other persons
- 5th Priority - "Other" eligible destinations (include banking, doctor prescribed therapy)

These trips will be targeted for geographic distribution as follows:

<u>Service Area</u>	<u>Rides</u>	<u>% of Ride</u>	<u>#Clients</u>
Santa Cruz/Mid-County/Aptos/Capitola	2668	58%	110
San Lorenzo/Scotts Valley	920	20%	40
Watsonville/ Freedom	1012	25%	60

These figures are based on population data derived from the latest census and available transit services for each area of operations. In considering geographic distribution of services, our goal is to provide extra support in those areas outside or in limited public transit services.

12. Consistency and relationship with the Regional Transportation Plan (RTP) - Is program/project listed in the RTP and/or consistent with a specific RTP Goal/Policy?

The Volunteer Center of Santa Cruz County has been receiving TDA funds for over 35 years and are active members of the Elderly & Disabled Transportation Advisory Committee. The program is listed in the Specialized Transportation Guide and is included in the draft Coordinated Public Transit-Human Services Transportation Plan providing all services listed in the plan.

13. Impact(s) of project on other modes of travel, if any (ex. parking to be removed): This project will have little or no impact on other modes of travel.

14. Estimated Project Cost/Budget, including other funding sources, and Schedule: *(attach project budget). Specialized Transportation Claims require 10% local match. Local match can take the form of fares, donations, agency charges, grants, revenue sharing and other non-restricted sources. In kind services many NOT apply toward the local match.*

What is the total project cost? \$82,747

Is project fully funded? Yes

What will TDA (and STA) funds be used on (ex. administration, brochures, engineering, construction)? Funds are used for Personnel Cost, Audit fees, Supplies, Telephone, Occupancy, Printing, Postage, Volunteer mileage, Background Checks, Administration, Computer Software and Fees.

15. Preferred Method and Schedule for TDA fund distribution *(see RTC Rules and Regulations for details)*:

a. Bike/Ped: ☐ Up to 90% upon initiation of work OR ☐ 100% upon project completion

b. CTSA: ☐ Quarterly disbursement, with up to 35% in first quarter, and the remaining quarterly payments being one-third of the remaining claim amount;
OR ☐ Quarterly disbursement

c. Volunteer Center: ☒ Full approved claim amount in the first quarter

d. SCMTD: ☐ Quarterly disbursement

16. TDA Eligibility:

	YES?/NO?
A. Has the project/program been approved by the claimant's governing body? Form of approval <u>work plans and budget</u> (eg resolution, work program, budget, other document) If "NO," provide the approximate date approval is anticipated. _____	Yes
B. Has this project previously received TDA funding?	Yes
C. For capital projects, have provisions been made by the claimant to maintain the project or facility, or has the claimant arranged for such maintenance by another agency? (If an agency other than the Claimant is to maintain the facility provide its name: _____)	NA
D. Bike, Ped, and Specialized Transportation Claims: Has the project already been reviewed by the RTC Bicycle Committee and/or Elderly/Disabled Transportation Advisory Committee? (If "NO," project will be reviewed prior to RTC approval).	Yes
E. For "bikeways," does the project meet Caltrans minimum safety design criteria pursuant to Chapter 1000 of the California Highway Design Manual? (Available on the internet via: http://www.dot.ca.gov).	NA

SCMTD, CTSA, Bike to Work, CTSC Only – PLEASE KEEP ANSWERS BRIEF

17. Improving Program Efficiency/Productivity

- Describe any areas where special efforts have been made in the **last fiscal year** to reduce operating cost and/or increase ridership/program usage. Note any important trends. Our program mobilizes volunteers whenever possible to assist with marketing and outreach.

- Goals for next fiscal year (ex. identify opportunities to maximize economies of scale, planned productivity improvements). Describe any areas where special efforts will be made to improve efficiency and increase program usage/ridership: Our transportation program is working to computerize our dispatching system. We will also use Google Talk to be able to text drivers in order to set up rides and increase overall communication efficiency.

18. What is different from last year's program/claim? Our program will be utilizing productivity improvements.

19. Schedule of regular progress reports including an evaluation at the end of the year:

☐ SCMD – April each year

☒ Specialized Transportation: Quarterly to E/D TAC, RTC

☐ CTSA: Bicycle Committee _____ (Month, year); RTC _____ (Month, year)

☐ B2W: Bicycle Committee _____ (Month, year); RTC _____ (Month, year)

CTSA and Volunteer Center (Article 8) Only

20. Are these transportation services responding to transportation needs not otherwise being met within the community or jurisdiction of the claimant? Describe.

The Volunteer Center's Transportation Program is a volunteer program providing free rides and serves to people who, through age, physical limitations are unable to use other public or private transportation resources. Approximately 1/2 of our clients live in congregate areas such as mobile homes and low-income housing. We specialize in meeting the needs of those clients outside the ADA-mandated Para transit service area. The service is provided free of charge to clients. There are no other providers of this service in the community

Where appropriate, are these specialized transportation services coordinated with other transportation services? Describe. When possible, the Volunteer Center will refer those callers whose requests cannot be accommodated through our program to other transportation programs. We often refer to Lifeline or in some cases Para Cruz.

Provide performance information, as pertinent, such as: verification of the operating cost per passenger, operating cost per vehicle service hour, passengers per vehicle service hour, passengers per vehicle service mile, and vehicle service hours per employee for last fiscal year (definitions available in Section 99247 of TDA Guidelines). (99246)

The program has no owned service vehicles or employee drivers. Volunteer driver use private vehicles. It is estimated that each one-way trip is 9.5 miles, with approximately 4,600 one-way rides provided in the last fiscal year. This is about 43,700 projected service miles per year. Each one-way ride is an average of 2.5-hour average or a total of 9660 service hours. Volunteers have the option of being paid mileage at a cost of \$.31/ mile, although not all accept payment. Based on the FY 2017-18 TDA allocation of \$79,157

and the service estimates provided by volunteer drivers, the cost per one-way passenger ride and a cost per vehicle service hour of about \$8.12 and a cost per service mile of \$1.80 making this a very cost efficient and effective program.

Discuss the needs and types of the passengers being served and the employment of part-time drivers and the contracting with common carriers of persons operating under a franchise or license to provide services during peak hours. The Transportation Program works in conjunction with the Santa Cruz County Regional Transportation Commission's Elderly & Disabled Transportation Advisory Committee/Social Service Transportation Advisory Council to help assure that transportation needs for the elderly and disabled are represented. We know from needs assessments that low or free transportation to elderly and disabled persons out side of the fixed routes or those unable to use fixed routes are in desperate need. Many of our clients live in rural areas, have little or no family to assist and are living on fixed incomes. The Volunteer Centers Transportation Program providing transportation to doctor's appointment, grocery shopping and other necessary appointment. Volunteer drivers provide the service free of charge to clients through out the county.

SCMTD, CTSC, Volunteer Center & RTC Only

21. List the recommendations provided in the last TDA Triennial Performance Audit and your progress toward meeting them.

- Describe the work your agency has undertaken to implement each performance audit recommendation and the steps it will take to fully implement the recommendation.
- For any recommendations that have not been implemented, explain why the recommendation has not been implemented and describe the work your agency will undertake to implement each performance audit recommendation.

Describe any problems encountered in implementing individual recommendations.

- Our independent Auditors review costs and revenues that are not aggregated in our accounts. TDA finances are audited as one of over 60 separate fund accounts. It would be too cumbersome to include all 60 plus accounts that are audited in the published financials. We have our auditors include a TDA finance page in the audit.
- Currently we have been putting our extra resources towards driver recruitment as our top priority. We have increased our volunteer driver pool in mid-county and in south county. Now we are refocusing our efforts in the San Lorenzo Valley.

SCMTD Only

22. Farebox Recovery Ratio: (split out=urbanized service vs. non-urban service farebox ratios for prior year and year-to-date)

<i>Funds</i>	<i>Urbanized Service</i>	<i>Rural/Non-Urban Service (Could use FTA 5311 application)</i>
Fare Revenue:	\$	\$
Local Support Revenues:	\$	\$
Operation costs:	\$	\$
Ratio Fare Rev ÷ Op Cost: (minimum required=15%)	____%	____%
Cost per ride being subsidized for different services/funds	\$	\$

Note: Exemptions for calculating operating costs – spell out in your operating budget summary.

- Service extensions are exempt until two years after the end of the fiscal year during which they were established (PUC Sec. 99268.8). This exemption applies only if the new service was not provided nor was funded by LTF/STA during any of the prior three fiscal years.
- The additional operating costs to a transit operator of providing comparable complementary paratransit

services, pursuant to the Americans with Disabilities Act, that exceed operator's prior year costs as adjusted by the CPI are excluded from operating cost.

23. Current fare & local support revenue to operating cost ratio versus FY1978-79 ratio (for services to the general public).

- Current ratio ((sum of fare revenues + local support) ÷ operating cost):
- FY1978-79 Ratio: _____

24. Did the SCMTD operating budget increase over 15% from the prior fiscal year?

If the answer is yes, please provide a statement identifying and substantiating the reason or need for the increase in the transit operating budget in excess of 15% above the preceding year, and identify substantial increases or decreases in the scope of operations or capital provisions for major new service - (transit claimants only, if applicable).

25. Operating statistics (compare current fiscal year to date to last three full fiscal years; *TDA required performance indicators), submit items from the following list.

- Annual passengers
 - Rides/passenger trips provided by type (student, senior, adult, pass holders, etc, or however stat's kept) and amount of TDA \$ used for each type of ride
- Annual service hours
- Passengers per vehicle service hour*
- Annual service miles
- # of fixed-route miles
- Service Area – square miles
- Service Area Population
- Passengers per vehicle service mile*
- Average passengers per weekday
- Total operating costs in budget
- Operating cost per vehicle service hour*
- Total operating cost per passenger*
- Average Farebox Revenue per passenger (describe what is included)
- # of FTE employees (all employees, not just drivers)
- Vehicle Service hours/Employee*
- # of routes
- Average route length
- Average travel times/rider
- # of bus stops
- # of vehicles in operation
- # of monthly bus passes in circulation
- Max vehicles in service at any time:
- Hours of service:
- Approximate # of unduplicated passengers
- Cost per unit of service plus text about long range plans to make/keep this low
- Funds and percentage spent on administration/overhead/grantee allocation/etc
- Actual financials compared with budget
- Actual number of rides provided compared with goal and text about whether goal was met and why/why not

- *Funds and percentage spent on administration/overhead/grantee allocation/etc*
- *Actual financials compared with budget*
- *Actual number of rides provided compared with goal and text about whether goal was met and why/why not*

Documentation to Include with Your Claim:

All Claims

- ☒ **A letter of transmittal** addressed to the SCCRTC Executive Director that attests to the accuracy of the claim and all its accompanying documentation.
- ☒ **Statement from the TDA Eligible Claimant** indicating its role and responsibilities.

Article 8 Bicycle/Pedestrian Claims

- ☐ Evidence of environmental review for capital projects

All Transit and Specialized Transportation Claims (SCMTD, CTSA, and Volunteer Center)

- ☒ **A copy of the operating and capital budgets for the coming fiscal year**
- ☒ **Description of capital projects**, including time frame over which project will be funded and implemented
- ☒ **Operating Plan** for current and upcoming activities – can be within project description

Article 4 Transit Claims

- ☐ **A certification from the California Highway Patrol** (completed within the last 13 months) indicating that the operator is in compliance with Section 1808.1 of the Vehicle Code.
- ☐ **Other Certifications**

Local Agency Certification:

This TDA Claim has been prepared in accordance with the SCCRTC's Budget, SCCRTC's Rules and Regulations, and Caltrans TDA Guidebook (<http://www.dot.ca.gov/hq/MassTrans/State-TDA.html>). I certify that the information provided in this form is accurate and correct. I understand that if the required information has not been provided this form may be returned and the funding allocation may be delayed.

Signature *Tara Chelmsford* Title: *Senior Programs Director* Date: *3/20/18*

Document 1

PROGRAM NAME:

Volunteer Center/ Transportation Progr

FISCAL YEAR:

2017-2018 2018-2019

REVENUES

Budget Unit Name			
Budget Unit Number			
4000	PUBLIC SUPPORT		
4007	Donations	800	1,000
4295	Transportation Commission	79,157	82,747
TOTAL CURRENT YEAR REVENUES		79,957	83,747
5001	Hourly Wages	56,038	58,279
	SUBTOTAL BENEFITS & TAXES	56,038	58,279
6012	Auditing Expense	500	500
6018	Copies	200	200
6032	Equipment		1,400
6038	Equipment, Repair	225	225
6039	Facility Maintenance	100	100
6040	Insurance, General	200	225
6042	Insurance, Volunteer	1,500	1,600
6050	Postage	150	150
6060	Rent	-	-
6061	Rent, Watsonville	5,000	4,500
6078	Office Supplies	150	169
6081	Computer Software & Fees	100	200
6098	Mileage, Volunteers	1,000	1,000
6100	Telecommunication	2,700	2,600
6125	Utilities	600	575
6150	Volunteer Recognition	300	300
6160	Admin Fees	11,194	11,724
TOTAL CURRENT EXPENSES		79,957	83,747

Exhibit A
VOLUNTEER CENTER OF SANTA CRUZ COUNTY
1740 17th Ave. Santa Cruz, CA 95062 427-5070

PROGRAM DESCRIPTION/SCOPE OF WORK
VOLUNTEER CENTER'S TRANSPORTATION PROGRAM
Fiscal Year 2018-19

A. TARGET POPULATION

The Volunteer Center's Transportation Program is a volunteer program providing rides and serves to people whom, through age, physical limitations or geographic location, are unable to use other public or private transportation resources. Volunteer drivers using their own vehicles provide rides. Our program is limited to ambulatory persons. Our service area is all of Santa Cruz County.

B. SERVICE GOALS

Our goal is to provide 4,600 one-way trips to eligible clients. Clients will be limited to a maximum of two rides per week. Our priority for filling requests is as follows:

1st Priority	Medical trips for low-income persons
2nd Priority	Medical trips for other persons
3rd Priority	Shopping for low-income persons
4th Priority	Shopping for other persons
5th Priority	Other eligible destinations

These trips will be targeted for geographic distribution as follows:

	<u>Rides</u>	<u>% of Rides</u>	<u>#Clients</u>
Santa Cruz/Mid-County/Aptos/Capitola	2668	58%	110
San Lorenzo/Scotts Valley	920	20%	40
Watsonville/ Freedom	1012	25%	60

These figures are based on population data derived from the latest census and available transit services for each area of operations. In considering geographic distribution of services, our goal is to provide extra support in those areas which are outside the boundaries of Lifeline services, or which receive limited Lifeline service and have limited public transit services.

C. PROGRAM ACTIVITIES

1. The Volunteer Center will maintain volunteer dispatchers Monday- Friday 10:00 a.m. to 2:00 p.m. in Santa Cruz (includes San Lorenzo and Scotts Valley) and Monday-Thursday from 10:00 a.m. to 1:00 p.m. in the Watsonville office.
2. When possible, the Volunteer Center will refer those callers whose requests cannot be accommodated through our program to other transportation programs.
3. The Volunteer Center will continue its intensive campaign to recruit new drivers and dispatchers for all offices.

4. Volunteer Center staff will attend all meetings of the Elderly and Disabled Transportation Advisory Committee of the Santa Cruz County Regional Transportation Commission.

D. QUARTERLY REPORTS

Volunteer Center of Santa Cruz Transportation Program TDA Funding Quarterly Reports and Final Activities Report are due to the Transportation Commission and the City of Santa Cruz according to this schedule:

Prior Year Annual Report:	September 7, 2018
Quarterly Activities Report 1:	October 26, 2018
Quarterly Activities Report 2:	February 8, 2019
Quarterly Activities Report 3:	April 26, 2019
Quarterly Activities Report 4:	July 26, 2019

The reports will contain the following information for each center and total:

1. Number of rides provided
2. Trip destinations
3. Mileage claimed
4. Estimated total mileage
5. Average length of trip
6. Number of unduplicated passengers
7. Number of requests for service
8. Number of turndowns
9. Reason for turndowns
10. Number of active volunteers
11. Geographic distribution of clients

E. INSURANCE

Comprehensive auto and general liability insurance over and above that held by the driver will be maintained by the Volunteer Center in the amount of \$1,000,000 per occurrence.

F. CLAIMS

One claim will be submitted for advance payment for the year:

Annual Advance - July, 2018 \$82,747

AGENDA: April 10, 2018

TO: Elderly & Disabled Transportation Advisory Committee

FROM: Grace Blakeslee, Transportation Planner

RE: FY 2018-19 Transportation Development Act Funds for Community Bridges

RECOMMENDATION

Staff recommends that the Elderly & Disabled Transportation Advisory Committee review the FY 2018-19 Transportation Development Act claim from Community Bridges in the amount of \$695,074 and recommend approval by the Regional Transportation Commission, contingent upon approval by the City of Santa Cruz to act as their claimant.

BACKGROUND

The Regional Transportation Commission (RTC) allocates Transportation Development Act (TDA) funds from the region's ¼ cent share of the state's 7.5 cent sales tax according to state law and established formulas in the Commission's Rules and Regulations. The RTC's FY 2018-19 draft budget was considered by the RTC Budget and Administration Personnel Committee (B&A/P) in March 2018 and includes TDA allocations based on the Santa Cruz County Auditor's estimates. The B&A/P recommends that the RTC adopt the RTC FY 2018-19 budget at the April 5, 2018 RTC meeting.

DISCUSSION

The Regional Transportation Commission (RTC) drafted a FY 2018-19 budget including Transportation Development Act (TDA) allocations for Community Bridges in the amount of \$695,074. Community Bridge's TDA Claim Form, scope of work and budget based on the RTC's approved budget is included as Attachment 1. Community Bridges has a goal to use TDA funds to provide approximately 21,584 one-way trips using their Taxi Scrip, Medical TDA, Meals on Wheels, and Elderday programs to eligible clients over FY 2018-19. Community Bridges staff will provide an overview of their TDA funded transportation services at the meeting and will be available to answer questions. Community Bridges will request that the City of Santa Cruz, as a local jurisdiction, act as the claimant.

Staff recommends that the E&D TAC approve the TDA claim for Community Bridges, and recommend RTC approval at their May 3, 2018 meeting, contingent upon approval by the City of Santa Cruz to act as the claimant.

SUMMARY

The E&D TAC annually reviews Transportation Development Act claims for Community Bridges, the Volunteer Center and Santa Cruz Metro, to ensure that these funds are allocated in accordance with TDA requirements and community needs, and makes recommendations regarding their approval to the Regional Transportation Commission.

Attachment 1: FY 2018-19 Community Bridges TDA Claim and operation/budget pages

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CLAIM FORM

This form has been developed in an effort to standardize information required from TDA recipients, based on TDA Statute, RTC Rules and Regulations, and/or RTC board requests.

Project Information

- 80

of social service transportation. As the Consolidated Transportation Service Agency, Lift Line coordinates transportation services with other transportation providers and human service agencies in order to provide the most efficient transportation possible. These agencies include Human Services Department of the County of Santa Cruz, County Office of Education, Veterans Service Offices in Santa Cruz and Palo Alto, and other hospitals and medical facilities.

Lift Line also works closely with several other non-profit organizations and other counties to continue to identify unmet needs and define effective responses to meet those needs. The ultimate goal of these efforts is to mobilize disabled, low-income and senior residents of Santa Cruz County. Lift Line also maintains a vital lifeline for eligible participants to access healthcare providers throughout the region, including destinations in Monterey County and the San Francisco Bay Area. This is consistent with the Association of Monterey Bay Area Governments (AMBAG) Coordinated Public Transit Plan.

The benefits to having CTSA coordination is to improve and identify the need for specialized transportation equipment, if the equipment is funded through Caltrans 5310 and isn't reaching its proposed requirements, as the CTSA, the equipment can be coordinated for use through other identified paratransit services.

Pursuant to the CTSA designation for Santa Cruz County, Community Bridges operates the Lift Line transportation program, which works in identifying unmet transportation needs, coordinates and provides social service transportation services to low-income seniors, disabled residents, underserved populations and other persons in Santa Cruz County. Lift Line directly addresses the issues identified through the unmet needs process by providing rides to medical appointments (including dialysis), alternative care, mental health, drug rehabilitation centers, dental appointments, pharmacies, and various therapy appointments.

11. Project Productivity Goals for this fiscal year:

- a. Measures of performance, success or completion to be used to evaluate project/program (ex. increase use of facility/service, decrease collisions, etc.):

The majority of our dispatching/scheduling is automated with Mobile Data Computers and Automatic Vehicle Locaters (AVL) that integrate with Trapeze, making changes if needed and track rides as they occur. As rides are completed, the MDTs tag completed rides with real pickup and drop-off times and highlights these times in blue, making it easier for our dispatchers to monitor all rides. Likewise, uncompleted or unassigned rides (such as will-call returns) are highlighted in red to inform the dispatcher of the priority of pending trips. The addition of the AVLs in the fleet allows Lift Line to monitor and track vehicles at any moment. These systems allow Lift Line to provide accurate monthly encounter data to satisfy data requirements.

We will continue to provide our quarterly TDA reports, with the RTC reporting requirements, which are generated directly from the actual rides performed and documented through these systems. Lift Line's dispatch system still has some manual components, to be used in the case of a power loss or technical difficulties. Since we cannot determine in advance when a power or technical problem should arise, we give all drivers a paper manifest to work from daily so as to not lose any information. Daily drivers fill out paper work to let us know if they have any incidents, accidents or mechanical failures. In order to track turndowns and referrals, staff who answer the phones keep track daily on a specified phone log.

Performance Measures to be included in Quarterly Reports

The quarterly reports are to include the following:

1.	Unduplicated passengers per month
2.	Total passenger trips (units of service) per month
3.	Incidents per month
4.	Accidents per month
5.	Mechanical failures* (including lift failure) per month
6.	No-shows per month
7.	Turndowns or referrals per month

8.	Cancels per month
9.	Donations per month
10.	Total operating cost per passenger
11.	Total operating cost per vehicle service hour
12.	Total passengers per vehicle service hour
13.	Total passengers per vehicle service mile
14.	Van mileage per program

*Mechanical failure means any problem which results in a delay of one hour or longer, or cancellation of service.

- b. Number of people to be served/anticipated number of users of project/program (ex. number of new or maintained bike miles; number of people served/rides provided):

Lift Line is projecting to provide service to nearly 700 Santa Cruz County residents who will need specialized wheel-chair accessible vans. We are projecting to provide and coordinate 50,000 rides in the 2018/2019 fiscal year. *Please see Exhibit C-1 and C-2 Operating Plan for details.*

Lift Line will continue to provide responsive, non-emergency health and medical paratransit services for low-income seniors and disabled residents of Santa Cruz County. Trips are provided to health and medical destinations such as hospitals, medical centers and clinics, doctors' offices, dental offices, pharmacies, dialysis centers, human services, and various mental health and physical therapy appointments. In partnership with Central Coast Alliance for Health, rides to medical destinations will be provided for qualified members. Lift Line continues to work closely with Satellite Dialysis in Santa Cruz County to provide flexible services for its clients who are unable to use transit or METRO ParaCruz services.

12. Consistency and relationship with the Regional Transportation Plan (RTP) - Is program/project listed in the RTP and/or consistent with a specific RTP Goal/Policy?

The Lift Line programs are consistent with 2014 RTP goals 1 and 3 and advance:

- Target #3c of the 2014 RTP: Reduce travel times and increase travel options for people who are transportation disadvantaged due to income, age, race, disability or limited English proficiency by increasing the percentage that are within a 30-minute walk, bike or transit trip to key destinations (Lift Line included as transit in this instance) and Target #3d: Ensure transportation services (and impacts) are equitably distributed to all segments of the population.

The Lift Line program also support the following RTP policies:

- Improve multimodal access to and within key destinations.
- Ensure network connectivity by closing gaps in the bicycle, pedestrian and transit networks.
- Support projects that provide access to emergency services.
- Improve coordination between agencies in a manner improves efficiencies, and reduces duplication.
- Demonstrate that planned investments will reduce disparities in safety and access for transportation-disadvantaged populations.

13. Impact(s) of project on other modes of travel, if any (ex. parking to be removed):

Lift Line is a complementary service to the ADA-mandated METRO ParaCruz service. In addition, Lift Line provides a flexible specialized transportation service for ongoing identified unmet immediate service needs. Due to the diverse nature of our services, Lift Line is able to group riders in various service categories, which ultimately reduces the number of vehicles needed to perform rides and in turn cuts down on traffic and emissions. Lift Line continues to optimize our service by scheduling rides in the most efficient manner and ultimately reducing the duplication of rides by grouping ride types for long distance, cross county rides.

Furthermore, Lift Line provides residents with specialized transportation needs who do not qualify for ParaCruz rides because they live outside the service area (more than ¾ mile from fixed transit route), don't

have family or friends to assist them, and/or they may need same day service. For people who are low-income or who face health/physical challenges, these services are crucial.

Lift Line was also awarded Section 5310 grant for operating funds in 2018-2021 to support same day and out of county medical transportation service, as identified in the AMBAG unmet needs plan. This new service was implemented in 2013 and we have been awarded 5310 funds to continue the project through February 2021. Most likely these funds will be used up during the 2020 calendar year because we were funded at 80% of our request.

14. Estimated Project Cost/Budget, including other funding sources, and Schedule: *(attach project budget). Specialized Transportation Claims require 10% local match. Local match can take the form of fares, donations, agency charges, grants, revenue sharing and other non-restricted sources. In kind services many NOT apply toward the local match.*

What is the total project cost? Total CTSA Transportation Budget = \$2,177,775 (TDA only \$695,074)
Is project fully funded? YES

What will TDA (and STA) funds be used on (ex. administration, brochures, engineering, construction)?
These funds will be used for administration, all cost related to provision of paratransit rides.

This is clearly identified in our Operating Plan Exhibit C-2. *Please see TDA Operating Plan, Exhibit C-2.*

15. Preferred Method and Schedule for TDA fund distribution *(see RTC Rules and Regulations for details):*

CTSA: ☒ Quarterly disbursement, with up to 35% in first quarter, and the remaining quarterly payments being one-third of the remaining claim amount;
OR ☐ Quarterly disbursement

16. TDA Eligibility:

	YES?/NO?
A. Has the project/program been approved by the claimant's governing body? Form of approval <u>Community Bridges Board Resolution</u> . (eg resolution, work program, budget, other document) If "NO," provide the approximate date approval is anticipated. _____	YES
B. Has this project previously received TDA funding?	YES
C. For capital projects, have provisions been made by the claimant to maintain the project or facility, or has the claimant arranged for such maintenance by another agency? (If an agency other than the Claimant is to maintain the facility provide its name: _____)	N/A
D. Bike, Ped, and Specialized Transportation Claims: Has the project already been reviewed by the RTC Bicycle Committee and/or Elderly/Disabled Transportation Advisory Committee? (If "NO," project will be reviewed prior to RTC approval). <u>April 10, 2018 E&D TAC meeting</u>	YES
E. For "bikeways," does the project meet Caltrans minimum safety design criteria pursuant to Chapter 1000 of the California Highway Design Manual? (Available on the internet via: http://www.dot.ca.gov).	N/A

SCMTD, CTSA, Bike to Work, CTSC Only – PLEASE KEEP ANSWERS BRIEF

17. Improving Program Efficiency/Productivity

- Describe any areas where special efforts have been made in the **last fiscal year** to reduce operating cost and/or increase ridership/program usage. Note any important trends.

Lift Line routes are continually assessed and re-structured to increase productivity, we group rides when possible so that vehicles and staff time are serving at capacity. This keeps the cost of operating down and helps keep the cost per service unit as low as possible. Failing to re-structure and maximized productivity would lead to increased cost per service unit. In the case of taxi subcontractors, we have paid special attention to maximizing the benefit of working with these outside partners only when we have reached our internal

existing capacity and there is a cost benefit to calling in a taxi ride. We continue to work with physicians and participants to improve efficiency through group rides. Our experienced drivers and dispatch staff, with the use of computerized scheduling equipment, continue to serve as valuable assets toward achieving these goals.

Community Bridges Lift Line continues to work with the UTU to address ways to lower the economical issues impacting the operations of the budget. We also continue to work on reducing our workers compensation costs and exposures in order to reduce our premiums. Lift Line also maintained optimum fleet size for the services provided, and we continually seek to update our vehicles and equipment through grants.

The County Health Services Department's programs, such as In Home Health Services, as well as local medical facilities and the Senior Network Services, are assisting their clients to help fill out the TDA Medical Transportation Application and fax them with the required supporting documents to our office daily. We also work closely with the Central Coast Alliance to coordinate Medi-Cal eligible participants with medical rides.

Lift Line has participated in several outreach forums in the community that are addressing the transportation needs of the local senior and disabled population, including veterans, as well as conducted presentations to local service organizations and senior living facilities. Lift Line participates annually in local business and health fairs to increase community awareness about local transportation service.

So far this FY Lift Line has increased its outreach efforts by 400% which was made possible with Measure D funds. We will continue to build our outreach program and get information out about our service and help enroll new clients into our program.

- Goals for next fiscal year (ex. identify opportunities to maximize economies of scale, planned productivity improvements). Describe any areas where special efforts will be made to improve efficiency and increase program usage/ridership:

Lift Line will continue to assess the cost and demand for our services on a regular basis, and structure our routes and staffing accordingly. Lift Line staff will continue to participate in outreach efforts to identify emerging needs in the community, and we will coordinate with service providers to meet the transportation needs of low-income elderly and disabled residents, including our area veterans. Our outreach program is also working to build our client base and educate clients about all of our services.

A driver trainer will work to get drivers trained and Class B certified in a quick and efficient manner. The driver trainer can work as a backup driver when needed, which will help fill in the gaps as well as help put drivers on the road sooner. This will increase productivity and help meet the ride demands without having to start denying rides or asking clients to schedule for a different day.

With the onboarding of our driver trainer this fiscal year, there is a plan to start working on a new and updated driver training module. Part of this plan is to increase efficiencies and identify areas for improvement. The plan will also educate drivers more on our clients' needs and awareness of how to better serve our clients.

The driver trainer has been working with drivers and helping them get their Commercial Drivers Licenses. This will help the overall driver base and help make the services more efficient and productive. This has already proven to be working. An example is where we use to have two drivers do a route in separate vehicles, we can use one Commercial Driver that is licensed to drive a higher capacity bus.

18. What is different from last year's program/claim?

Community Bridges Lift Line/CTSA is requesting TDA funds to assist with the same types of rides as last year, with the exception of funding for the Winter Shelter Program. We are requesting funding for: Medical TDA Rides, Meals on Wheels, Elderday, and the Taxi Scrip programs.

19. Schedule of regular progress reports including an evaluation at the end of the year:

☒ CTSA: Specialized Transportation: Quarterly to E/D TAC, RTC: Nov 2017, Jan 2018, Apr 2018, Jul 2018 and year end report 17/18

CTSA and Volunteer Center (Article 8) Only

20. Are these transportation services responding to transportation needs not otherwise being met within the community or jurisdiction of the claimant? Describe.

Yes. We provide transportation that is otherwise not available to our target population.

Lift Line paratransit services are offered to low income seniors and people with disabilities that cannot drive or are not able or eligible to use METRO or METRO ParaCruz services (do not have the financial resources, have origins/destinations outside the service area, or need same-day service.)

Our out of county Medical ride service is used by residents who have no other resources, particularly due to financial restraints, to get to critical care treatment. The veterans we are currently providing paratransit services for are funded through the FTA Section 5310 Grants Program. This grant has been awarded through February 2021, and we very proud to be able to maintain this service for as long as possible, as demand for service for this specific population has continued to grow. Even though the 5317 funds for this service came to an end, Lift Line/CTSA continues to seek other funding sources to support this service, which was an unmet need in the coordinated plan.

21. Where appropriate, are these specialized transportation services coordinated with other transportation services? Describe.

Lift Line, as the CTSA, acts as the safety net transportation service for low-income seniors and disabled individuals unable to secure mobility through other programs. We coordinate and refer people daily to other services more suited to their specialized transportation requirements, such as: METRO bus or METRO ParaCruz; local taxi services through the taxi scrip program; the Volunteer Center; Veterans Services and our in house "Out of County" Medical ride service.

We work closely with Watsonville, Capitola, and Santa Cruz Satellite Dialysis to provide flexible service for the clients. We help identify an individual's specific need for specialized transportation service and coordinate not only services in our County, but also for rides to neighboring counties of San Benito, Monterey and Santa Clara. In addition, Lift Line assists those who call from other parts of California, as well as from out of the state, looking for other public and specialized transportation.

Lift Line's staff will continue to participate with local and statewide transportation groups to develop coordinated processes and keep current on transportation systems for seniors and disabled residents.

22. Provide performance information, as pertinent, such as: verification of the operating cost per passenger, operating cost per vehicle service hour, passengers per vehicle service hour, passengers per vehicle service mile, and vehicle service hours per employee for last fiscal year (definitions available in Section 99247 of TDA Guidelines). (99246) (99246d, per 2010 Performance Audit)

All TDA reports, quarterly and annual are sent directly to the RTPA within the scheduled time schedules. These reports are included in the above listed performance measures.

23. Discuss the needs and types of the passengers being served and the employment of part-time drivers and the contracting with common carriers of persons operating under a franchise or license to provide services during peak hours, as defined in subdivision (a) of Section 99260.2. (99246d, per 2010 Performance Audit)

There are times during the day when it is more cost effective or necessary to use taxi to provide some of the TDA Medical rides, especially when they are short rides and more on an individual need basis, while Lift

Line buses provided more of the grouped rides. Lift Line has two on-call drivers to assist with paratransit services as needed.

24. **SCMTD, CTSC, Volunteer Center & RTC Only** List the recommendations provided in the last TDA Triennial Performance Audit and your progress toward meeting them.
- Describe the work your agency has undertaken to implement each performance audit recommendation and the steps it will take to fully implement the recommendation.
 - For any recommendations that have not been implemented, explain why the recommendation has not been implemented and describe the work your agency will undertake to implement each performance audit recommendation.
 - Describe any problems encountered in implementing individual recommendations.

TDA Triennial Performance Audit Recommendations:

The last TDA Triennial Performance Audit covers FYs 2013-2016.

There was one recommendation noted which states the following,

“Community Bridges Lift Line should continue to pursue funding for a driver trainer/supervisor position.

The driver trainer/supervisor position is key to maintaining a solid core of drivers qualified to operate the vehicles and provide customer service.”

Lift Line has met the last performance audit recommendation by hiring a full time driver trainer. This position was filled and started at the beginning of the FY 17/18

Documentation to Include with Your Claim:

All Claims

- ☒ **A letter of transmittal** addressed to the SCCRTC Executive Director that attests to the accuracy of the claim and all its accompanying documentation.
- ☒ **Statement from the TDA Eligible Claimant** indicating its role and responsibilities.

Article 8 Bicycle/Pedestrian Claims

- ☐ Evidence of environmental review for capital projects

All Transit and Specialized Transportation Claims (SCMTD, CTSA, and Volunteer Center)


- ☒ **A copy of the operating and capital budgets for the coming fiscal year**
- ☐ **Description of capital projects**, including time frame over which project will be funded and implemented
- ☒ **Operating Plan** for current and upcoming activities – can be within project description

Article 4 Transit Claims

- ☒ **A certification from the California Highway Patrol** (completed within the last 13 months) indicating that the operator is in compliance with Section 1808.1 of the Vehicle Code.
- ☐ **Other Certifications**
- ☒ **Written report** of current and upcoming activities. (*per RTC Rules and Regulations*)

Local Agency Certification:

This TDA Claim has been prepared in accordance with the SCCRTC’s Budget, SCCRTC’s Rules and Regulations, and Caltrans TDA Guidebook (<http://www.dot.ca.gov/hq/MassTrans/State-TDA.html>). I certify that the information provided in this form is accurate and correct. I understand that if the required information has not been provided this form may be returned and the funding allocation may be delayed.

Signature  Title: Chief Executive Officer Date: April 4, 2018

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Lift Line 2017-18 TDA Claim Form Article 4 Written Report of Current and Upcoming Activities

Community Bridges Lift Line is designated as the Consolidated Transportation Services Agency (CTSA) of Santa Cruz County. Community Bridges has operated transportation under this designation since 1982.

Lift Line provides and coordinates the most accessible, reliable and safe transportation possible. We provided more than 72,000 rides in the past fiscal year to frail, elderly, and disabled county residents at no cost to the passengers. Lift Line now operates daily from 8:00 a.m. until 4:00 p.m. Hours of operation are extended in the case of emergencies, special occasion, and special requests. Lift Line also coordinates and schedules taxi rides that are provided outside of business hours.

With a current fleet of 19 vehicles, Lift Line provides a variety of services to assist seniors and people with disabilities in getting to where they need to go.

Current Services Offered Include:

Medi-Cal: In partnership with the Central Coast Alliance for Health, rides to medical destinations are fully covered for qualified members who have been determined to need above ADA METRO Para Cruz services.

TDA Medical Transportation: Transportation Development Act funds are used to provide medical rides (two round-trips per week) to persons qualified as low-income disabled or elderly.

Senior Dining Centers: Lift Line provides transportation to four senior dining centers throughout the County five days per week.

Taxi Scrip: Taxi Scrip is available for persons who are disabled and/or age 60 and over. Depending on income \$30 of Scrip can be purchased for \$16 or \$30 worth of Scrip for \$8 (limited amounts of Scrip available). In FY17/18, we have made efforts to increase the amount of Scrip that can be purchased, with goal of providing 1,000 passenger trips during this period.

Elderday Adult Day Health Care Transportation: Transportation is provided to the Elderday program that provides outpatient day health care to seniors and community residents who need constant care, and/or are diagnosed with dementia or Alzheimer's type of dementia.

Outside Contracts: Lift Line is available for community events for groups needing specialized transportation accessible for the elderly and disabled.

Non-Emergency Medical Transportation: Available within Santa Cruz County for private pay.

Lift Line was able to secure FTA Section 5310 funding to continue the following services through February 2021. Lift Line will continue to provide these services:

Out of County Medical rides: Lift Line provides door-to-door specialized transportation to low income residents who have no other way to get to medical facilities for appointments that are in Santa Clara, San Mateo, and San Francisco Counties.

Veterans' Transportation: Lift Line coordinates and provides transportation for local veterans to out of county VA outpatient medical facilities in Monterey and Palo Alto.

Veterans' Shuttle Watsonville: Lift Line coordinates and provides transportation for local veterans from CVS located at 490 Rodriguez Street Watsonville on Wednesdays at 9:15am to Veterans Memorial Building located at 846 Front St. Santa Cruz. The return to CVS is at 2:00pm.

Same Day Medical Transportation: First come, first serve same day rides for eligible riders to medical appointments including dentist, prescription drugs, and other medical related needs.

Upcoming Activities & Challenges

Community Bridges has purchased space for the Lift Line scheduling offices located at 519 Main Street in Watsonville. As of October 2017, we lease this space as an interagency tenant. While we plan to continue to lease this same location, finding a permanent location and funding to build or purchase a Lift Line Maintenance/Operations Facility has been identified as an unmet paratransit need by the Elderly and Disabled Transportation Advisory Committee, and is part of the proposed 2017 Unmet Paratransit and Transit Needs List.

With the passing of Santa Cruz County Sales Tax Measure D, Lift Line has added two additional drivers to provide expanded hours of paratransit service, up to seven days per week. We have implemented a Driver Trainer position to support safety and service for paratransit drivers, as well as an Administrative Assistant/Dispatcher to support additional paratransit rides. Measure D funds have also supported outreach and publicity materials to promote paratransit ride availability and service expansion, and operating funds to support vehicle and equipment maintenance and acquisition, financial solvency, occupancy and overhead expenses.

COMMUNITY BRIDGES - LIFT LINE / CTSA

EXHIBIT A, Page 1 of 3

TDA 2018-19 BUDGET

	695,074			300-71.0		
	TDA	Non-TDA	CTSA	TDA	Non-TDA	CTSA
	2018-19	2018-19	2018-19	2017-18	2017-18	2017-18
ACCOUNT TITLE	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET
PERSONNEL:						
Salaries & Wages	314,254	538,461	852,715	287,124	493,928	781,052
Fringe Benefits: Unemployment	2,357	4,038	6,395	2,153	3,489	5,642
Workers Comp	18,855	32,308	51,163	11,916	20,519	32,435
Health Insurance	56,566	96,923	153,489	51,682	78,819	130,501
FICA	24,040	41,192	65,233	21,965	37,161	59,126
401K Plan	1,257	2,154	3,411	1,148	1,864	3,012
TOTAL PERSONNEL COSTS:	417,329	715,076	1,132,405	375,989	635,779	1,011,768
SERVICES & SUPPLIES:						
OPERATING:						
Vehicle Operations-Fuel	33,143	53,950	87,093	33,845	45,330	79,175
Vehicle Licenses	1,510	2,458	3,969	1,466	2,387	3,853
Vehicle Repair & Maintenance	14,116	22,979	37,095	13,705	22,310	36,015
Vehicle Insurance	35,035	57,031	92,066	33,484	54,505	87,989
Communications-Radio	6,273	10,211	16,483	6,090	9,913	16,003
TOTAL VEH. OPERATING COSTS:	90,077	146,629	236,706	88,590	134,445	223,035
OTHER OPERATING & ADMINISTRATION COSTS:						
Professional Services	5,987	9,745	15,732	8,526	24,400	32,926
Janitorial Services/Supplies	1,018	1,657	2,675	1,475	1,122	2,597
Publicity/Media	0	5,000	5,000	0	8,648	8,648
Special Events	0	1,166	1,166	0	1,132	1,132
Staff travel	899	0	899	899	0	899
Minor Equipment	0	10,524	10,524	5,810	8,407	14,217
Equip Maintenance/Repair-Trapeze	13,563	22,079	35,642	19,049	15,555	34,604
Office Supplies	339	552	891	467	398	865
Program Supplies	1,287	2,095	3,383	2,009	1,275	3,284
Vehicle Maintenance Supplies	285	465	750	0	472	472
Computer Supplies/Related	1,743	2,838	4,581	306	4,142	4,448
Postage	395	643	1,037	589	418	1,007
Space Rental	22,338	36,362	58,699	22,285	38,119	60,404
Utilities	6,181	10,062	16,244	2,526	12,241	14,767
Space Maintenance	1,332	2,168	3,500	1,125	239	1,364
Telephone	2,359	3,839	6,198	2,973	2,930	5,903
Misc Fees	1,770	2,881	4,651	955	3,561	4,516
Staff Training	1,338	2,178	3,516	2,828	586	3,414
Insurance-General Liability & Fidelity	1,409	2,294	3,703	3,220	0	3,220
Memberships/Subscriptions	423	688	1,110	115	963	1,078
Printing & Copying	493	802	1,295	610	647	1,257
Advertising (Recruitment)	0	4,883	4,883	0	4,741	4,741
Subsidized Taxi - Elderday Rides	0	2,599	2,599	0	2,599	2,599
Subsidized Taxi - MOW Rides	0	3,916	3,916	0	3,916	3,916
Subsidized Taxi - LL Rides	14,735	23,986	38,721	7,644	27,557	35,201
Subsidized Taxi - Scrip	8,987	14,630	23,617	23,617	0	23,617
Nonsubsidized Taxi-Health Proj Ctr Scrip	0	0	0	0	2,573	2,573
Nonsubsidized Taxi-Measure D Svcs	0	30,000	30,000	0	30,000	30,000
Trxfer to/from Equip Reserve	0	25,000	25,000	0	24,106	24,106
300 Facility Reserve	0	285,592	285,592	0	392,016	392,016
Major Equipment - 5310	0	0	0	0	402,927	402,927
Major Equipment - Non-5310	0	0	0	0	279,951	279,951
Leasehold Improvements	0	0	0	0	19,142	19,142
Agency Overhead	100,786	112,353	213,139	96,939	121,398	218,337
TOTAL ADMINISTRATION COSTS:	187,668	620,996	808,664	203,966	1,436,182	1,640,148
TOTAL EXPENDITURES	695,074	1,482,701	2,177,775	668,545	2,206,406	2,874,951
TOTAL REVENUES	695,074	1,482,701	2,177,775	668,545	2,196,019	2,864,564
NET GAIN (LOSS)	0	0	0	0	(10,387)	(10,387)

**COMMUNITY BRIDGES - LIFT LINE / CTSA
TDA 2018-19 BUDGET**

EXHIBIT A, Page 2 of 3

ACCOUNT TITLE	TDA 2018-19 BUDGET	Non-TDA 2018-19 BUDGET	CTSA 2018-19 BUDGET	TDA 2017-18 BUDGET	Non-TDA 2017-18 BUDGET	CTSA 2017-18 BUDGET
REVENUE:						
TDA	695,074	0	695,074	668,545	0	668,545
City of Santa Cruz		0	0		0	0
City of Capitola		30,000	30,000		47,934	47,934
City of Scotts Valley		3,144	3,144		3,144	3,144
City of Watsonville		2,500	2,500		2,500	2,500
County of Santa Cruz		15,000	15,000		15,000	15,000
County of SC-Measure D Sales Tax		766,156	766,156		766,156	766,156
Area Agency on Aging-Title IIIB		38,448	38,448		38,448	38,448
FTA Section 5310-Traditional		0	0		402,927	402,927
FTA Section 5310-Expanded		105,600	105,600		109,832	109,832
Monterey Peninsula Foundation		40,000	40,000		40,000	40,000
Community Foundation-SC Co		0	0		6,667	6,667
Calif Air Resources Board (CARB)		0	0		268,219	268,219
Medi-Cal (Central Coast Alliance for Health)		50,694	50,694		50,694	50,694
Outside Contracts-Winter Shelter		0	0		6,118	6,118
Outside Contracts-Other		31,704	31,704		31,704	31,704
Scrip - Client Payments		9,194	9,194		9,194	9,194
Scrip - Health Project Center		0	0		3,394	3,394
MOW Intra-Program Charges		42,500	42,500		42,500	42,500
Elderday Intra-Program Charges		312,572	312,572		307,865	307,865
Donations		6,000	6,000		5,890	5,890
Fundraising-Van Sponsorships		13,500	13,500		13,710	13,710
Program Income-Other		3,500	3,500		3,726	3,726
Vehicle Maintenance Intra-Program Charges		12,189	12,189		11,834	11,834
Misc Intra-Program Charges		0	0		563	563
Vehicle Sales		0	0		8,000	8,000
TOTAL REVENUES	695,074	1,482,701	2,177,775	668,545	2,196,019	2,864,564

**COMMUNITY BRIDGES - LIFT LINE / CTSA
TDA 2018-19 BUDGET**

EXHIBIT A, Page 3 of 3

OPERATING FUND SOURCES	CTSA FINAL FY 16-17	CTSA BUDGET FY 17-18	CTSA BUDGET FY 18-19
TDA	668,545	668,545	695,074
City of Santa Cruz	14,500	0	0
City of Capitola	47,934	47,934	30,000
City of Scotts Valley	3,041	3,144	3,144
City of Watsonville	1,890	2,500	2,500
County of Santa Cruz	9,020	15,000	15,000
County of SC-Measure D Sales Tax	0	766,156	766,156
CARB	0	268,219	0
Area Agency on Aging-Title IIIB	39,280	38,448	38,448
FTA Section 5310-Expanded	67,526	109,832	105,600
Monterey Peninsula Foundation	40,000	40,000	40,000
Community Fdn of SC	0	6,667	0
Medi-Cal (Central Coast Alliance for Health	78,339	50,694	50,694
Outside Contracts-Winter Shelter	47,474	6,118	0
Outside Contracts-Other	30,556	31,704	31,704
Scrip - Client Payments	8,430	9,194	9,194
Scrip - Health Project Center	9,576	3,394	0
MOW Intra-Program Charges	42,500	42,500	42,500
Elderday Intra-Program Charges	312,572	307,865	312,572
Fundraising-Van Sponsorships	13,710	13,710	13,500
Donations	9,871	5,890	6,000
Vehicle Maintenance Intra-Program Charge	9,069	12,397	12,189
Vehicle Sales	0	8,000	0
Misc Income	3,652	3,726	3,500
SUBTOTAL REVENUES	1,457,485	2,461,637	2,177,775
SECTION 5310 - PASS THRU	39,978	402,927	0
TOTAL REVENUES	1,497,463	2,864,564	2,177,775

EXHIBIT B

CTSA FIVE YEAR CAPITAL IMPROVEMENT PLAN 18/19 FISCAL YEARS: 17/18 THROUGH 21/22

CAPITAL REVENUE					
	Projected 2017-2018	Projected 2018-2019	Projected 2019-2020	Projected 2020-2021	Projected 2021-2022
Fund Balance	\$15,163	\$15,168	\$15,173	\$15,178	\$15,183
FTA Section 5310	\$402,926	\$0	\$0	\$755,000	\$0
Addition to Fund	\$0	\$0	\$0	\$0	\$0
Fund Interest	\$5	\$5	\$5	\$5	\$5
Total	\$418,094	\$15,173	\$15,178	\$770,183	\$15,188
CAPITAL EXPENDITURES					
	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022
Equipment Purchase	\$402,926	\$0	\$0	\$755,000	\$0
Major Maintenance	\$0	\$0	\$0	\$0	\$0
Total	\$402,926	\$0	\$0	\$755,000	\$0
Year-End Balance	\$15,168	\$15,173	\$15,178	\$15,183	\$15,188

Notes:

1. As capital equipment grant periods and arrival dates vary, projected figures may require adjustment.
2. Equipment Purchase in FY17/18 is 5 Buses, 10 MDT's, 4 2-Way Radios, and 8 Computer Workstations
3. Equip Purchase FY20/2: 3 Minivans, 3 Med Buses, 5 Large Buses, Computer Server, Communic. Equip

EXHIBIT C-1
Lift Line / CTSA
FY18/19 OPERATING PLAN

1. Operating Plan

The Lift Line program provides demand-responsive, specialized non-emergency health and medical transportation for low-income seniors and disabled residents of Santa Cruz County. Riders are not charged a fare for the service. Service is generally provided from 8:00 AM to 4:00 PM, seven days a week (with the exception of published holidays), while Lift Line also coordinates additional services on behalf of its clients outside these hours.

Service is focused on individuals that live outside the METRO ParaCruz service area, those who are unable to afford the METRO ParaCruz fare, those that do not meet the ADA complementary paratransit eligibility requirements, those needing same day service, and those that need a higher level of service than can be provided by METRO ParaCruz. Lift Line operates a fleet of 19 wheelchair accessible vans. Transportation is provided to destinations such as doctors' offices, pharmacies, Elderday Adult Day Health Care, Senior Dining Centers, out of county medical destinations, dialysis sites, and various medical therapy appointments. Clients are generally ask to book their medical rides between 8:30am and 3:30pm.

Lift Line is seeking to continue TDA Medical Rides service and ensure this service reaches those with the most need. Lift Line projecting 5,345 TDA Medical Rides for FY 18/19,

The TDA Medical Rides program serves as a safety net service for medical rides outside the ADA-mandated METRO paratransit service areas. Eligible individuals may schedule rides to medical destinations as late as one day in advance, with no fares collected. Currently all of the residents that receive medical rides are low income and below the federal 200% poverty level. Lift Line staff continue to update participant applications to reflect the new Federal Government poverty level guidelines to ensure income and disability eligibility is maintained by participants.

Lift Line also coordinates with the local taxi companies to offer the Taxi Scrip (TS) program. Lift Line is projecting 3,457 Taxi Scrip rides in FY 18/19.

The Taxi Scrip program serves as a safety net service for medical rides and non-medical rides needed outside the ADA-mandated METRO paratransit service areas. Individuals may purchase subsidized taxi scrip so that they can directly schedule taxi rides. Taxi companies own and operate vehicles that are fully accessible for mobility devices such as wheelchairs. Currently all residents that receive Taxi Scrip at a discount are low income and below the federal 200% poverty level. Lift Line staff continue to update the TDA applications to reflect the new Federal Government poverty level guidelines. Area taxi service providers include: Courtesy Cab, and Santa Cruz Cab. Lift Line provides ongoing monitoring and assessment of the program to ensure that eligibility criteria are met, safety criteria are met by subcontractors, and to ensure there is no abuse of this vital program. Currently clients can purchase three \$10.00 books, for a total of \$30.00 worth of scrip, for \$8.00 which would give them approximately one (1) or two (2) rides per book. There is currently a limit to purchase three books per person per quarter.

Lift Line is projecting 11,243 Meals on Wheels rides for FY 18/19, 4,658 of which will be funded with TDA funds.

We are on track to meet our projected goal for the current fiscal year. Lift Line will continue to coordinate with the Meals on Wheels program to increase attendance at all of the senior dining centers, as Lift Line continues to meet with the Meals on Wheels Program Director and site managers to review unmet transportation service needs.

Lift Line is projecting 21,190 Elderday rides in FY 18/19, of which 8,124 are funded by TDA.

The Elderday program provides outpatient adult day health care to seniors and community residents who need constant care, and/or are diagnosed with dementia or Alzheimer's disease. Almost all of these participants use wheelchairs or walkers, and require vans with lifts. Generally, these clients are very frail and need personal, door-to-door assistance. Elderday rides are reflective of the level of client service that Lift Line drivers provide to patients with critical needs.

Lift Line is not projecting any rides for the Winter Shelter program (WS) in FY 18/19 due to the Salvation Army taking over the program and then transportation mid FY 17/18.

The Salvation Army took over the operation of the Winter Shelter program in mid fiscal year 2017/18 and contacted Lift Line notifying us of their intention to purchase two buses and start providing their own transportation. Due to this change Lift Line fell short on our ride projections for FY 17/18. We provided transportation for five weeks of the program performing 1,432 rides of the 18,602 projected. Lift Line used \$3,955 in TDA funds for this five week period. This has left \$23,455 TDA funds remaining which Lift Line has applied to Medical TDA transportation. This added an additional 394 rides for FY 17/18, bringing the total Medical TDA rides projections from 4,632 to 5,026. The additional rides were calculated by taking the cost of a Medical TDA ride at \$59.54 and dividing it into the remaining \$23,455 funds. With the loss of this program Lift Line's FY 18/19 total annual ride projections were dramatically reduced, as Winter Shelter accounted for 26% of the total annual ride projections for FY17/18.

Lift Line staff will continue to work with the Santa Cruz County Regional Transportation Commission's Elderly and Disabled Transportation Advisory Committee (E&D TAC) in identifying and addressing unmet needs.

Lift Line continues to work with the E&D TAC in meeting the Unmet Transit and Paratransit Needs as well as the recommendations of the Paratransit Coordination Task Force. For those who don't qualify for METRO ParaCruz or Medical assistance, we will continue to help them complete the required paperwork to make it easier for them to use the current TDA programs that meet their specific needs. In our role as the Consolidated Transportation Service Agency, Lift Line will continue working with other transportation providers to ensure maximum efficiency and coordination of rides for all residents.

Lift Line will continue to focus its resources on transportation needs that are not being met by other paratransit services, such as ADA-mandated METRO ParaCruz.

Through TDA funding, Lift Line will continue to serve those not eligible for METRO ParaCruz service, specifically low-income individuals who cannot afford the \$8.00 to \$12.00 round-trip METRO ParaCruz fare, those who don't meet the strict ADA qualifications, and those with origins/destinations outside of the METRO ParaCruz service area. Lift Line has seen an increase in demand for its services resulting from fare increases and reduced services from METRO ParaCruz. Also, because Lift Line provides safety net services to those ineligible or unable to use other services, its goal is to provide flexible programs, scheduling, and dispatching that can respond to the changing needs of all participants.

Community Bridges maintains comprehensive auto and general liability coverage, including the City of Santa Cruz and SCCRTC as additional insured parties. A copy of each insurance certificate shall be filed with the City and with SCCRTC.

OPERATION PLAN SERVICE OF UNITS
EXHIBIT C-2
2018 / 2019

TABLE 1 - TDA PROPOSED SERVICE UNITS

	TAXI SCRIP	MEDICAL TDA	MEALS ON WHEELS	ELDERDAY	WINTER SHELTER PROGRAM	TOTAL UNITS	TOTAL
FUNDS ALLOCATED	\$71,820	\$353,377	\$66,202	\$203,675	\$0	21,584	\$695,074
OPERATING COST	\$12.70	\$40.96	\$9.38	\$15.17	\$0.00		
A. PROGRAM MANAGEMENT i.e., Mgmt Personnel: Director, Fleet Mgr, Admin Asst, Info Mgr, Rent, Liability Insur., Phone, Supplies, etc.	\$5.07	\$15.56	\$3.87	\$6.26	\$0.00		
B. ADMINISTRATION 14.5% of total cost per unit.	\$3.01	\$9.59	\$0.96	\$3.64	\$0.00		
TOTAL COST PER SERVICE UNIT	\$20.78	\$66.11	\$14.21	\$25.07	\$0.00		
18/19 PROJECTED TDA UNITS OF SERVICE	3,457	5,345	4,658	8,124	0	21,584	
EQUIPMENT PURCHASE MATCH						0	
TOTAL TDA CLAIM REQUEST							\$695,074

NON-TDA SUPPORTED

TABLE 2 - OTHER CTSA SERVICE UNITS

	Meals on Wheels	Elderday Services	Section 5310 Medical	Measure D Paratransit	Dialysis	Total Units	Total
Funds Allocated	\$93,592	\$327,572	\$105,600	\$455,561	\$50,694		\$1,033,019
Revenue per Service Unit	\$14.21	\$25.07	\$100.41	\$66.11	\$66.11		
18/19 Projected Units of Service	6,585	13,066	1,052	6,891	767	28,360	
Other Income							\$139,090
Total Operating Income							\$1,172,109
Measure D Facility/Equip Reserves							\$310,592
FTA Section 5310-Capital Equipment							\$0
TDA Claim							\$695,074
Grand Total							\$2,177,775

ROLLUP OF ALL RIDES

TABLE 3 - ALL SERVICE UNITS TOTALED (Total tables 1 and 2, units of service, to equal table 3 totals)

	Taxi Scrip	TDA Medical	Meals on Wheels	Elderday Services	Section 5310 Medical	Measure D Paratransit	Dialysis	Total Units
18/19 Total Ride Projections	3,457	5,345	11,243	21,190	1,052	6,891	767	49,944

Exhibit D

Schedule of Payments FY: 2018-2019 TDA Claim Life Line CTSA

July 15, 2018	\$243,276
October 15, 2018	150,599
January 15, 2019	150,599
April 15, 2019	150,599
Total	\$695,074

Preferred Method and Schedule for TDA fund distribution: Quarterly disbursement, with up to 35% in first quarter, and the remaining quarterly payments being one-third of the remaining claim amount.

EXHIBIT E
Lift Line / CTSA
18/19 Statement of Role and Responsibility

Community Bridges has been the designated Consolidated Transportation Services Agency (CTSA) since 1982. CTSA's are authorized under California Government Code Sections 15975 and 15950-15952 which were enacted pursuant to the Social Service Transportation Improvement Act. The purpose of the CTSA is to improve transportation required by social service recipients by promoting the consolidation and coordinating of social service transportation. As the Consolidated Transportation Service Agency, Community Bridges Lift Line will continue to coordinate and consolidate transportation services with other transportation and human service agencies in order to provide the most efficient transportation possible. Lift Line will continue to work with Santa Cruz County School Districts, Human Services Department of the County of Santa Cruz, County Office of Education, Veterans Service Offices in Santa Cruz and Palo Alto, Hospice of Santa Cruz County, as well as hospitals and other medical facilities. Community Bridges Lift Line will also continue working closely with the RTPA and to help with the unmet needs identified in the Tri-County AMBAG Coordinated Plan. Community Bridges Lift Line will also continue working with local non-profit organizations and other human service and medical facilities in neighboring counties to continue to define and create an effective mobility management center to help mobilize resident with various disabilities, low income and senior populations to travel easily throughout our County as well as to travel seamlessly throughout our tri-county Monterey Bay region and the San Francisco Bay Area.

As the CTSA, Community Bridges Lift Line will continue coordination to improve and identify the need for specialized transportation equipment. If the equipment funded through Caltrans 5310 isn't reaching its proposed requirements through their contract, the equipment can be recaptured and its use coordinated through other identified paratransit service needs. We will continue to offer training to ensure that not only Lift Line staff operates in a safe and sensitive manner, but will continue to offer expertise and training for other transportation providers in the County.

Pursuant to the CTSA designation for Santa Cruz County, Community Bridges operates the Lift Line transportation program, which will continue to take a lead, and work closely with the RTPA, to continue to help identify unmet transportation needs, coordinate and provide social service transportation services to low-income seniors, disabled residents, underserved populations and other identified individuals in Santa Cruz County. Lift Line will continue to directly address the issues identified through the unmet needs process by providing rides to medical appointments (including dialysis), alternative care, mental health and various medical transportation needs.

Exhibit F
Reporting Period and Performance Measures
FY: 2018-2019 TDA Claim
Community Bridges' Life Line CTSA

	Reporting Period	Due
1.	Fiscal Year: 2018/19	11/15/18
2.	1 st Quarter, 7/1/18 through 9/30/19	01/15/19
3.	2 nd Quarter, 10/1/18 through 12/31/18	04/15/19
4.	3 rd Quarter, 1/1/19 through 3/31/19	07/15/19
5.	4 th Quarter, 4/1/19 through 6/30/19	11/15/19
6.	Annual Evaluation, Fiscal Year 2018/2019	11/15/19

Performance Measures to be included in Quarterly Reports

The quarterly reports are to include the following:

1.	Unduplicated passengers per month
2.	Total passenger trips (units of service) per month
3.	Incidents per month
4.	Accidents per month
5.	Mechanical failures* (including lift failure) per month
6.	No-shows per month
7.	Turndowns or referrals per month
8.	Cancels per month
9.	Donations per month
10.	Total operating cost per passenger
11.	Total operating cost per vehicle service hour
12.	Total passengers per vehicle service hour
13.	Total passengers per vehicle service mile
14.	Van mileage per program

*Mechanical failure means any problem which results in a delay of one hour or longer, or cancellation of service.

AGENDA: April 10, 2018

TO: Elderly & Disabled Transportation Advisory Committee

FROM: Grace Blakeslee, Transportation Planner

RE: FY 2018-19 Transportation Development Act Funds for the Santa Cruz Metropolitan Transit District

RECOMMENDATION

Staff recommends that the Elderly & Disabled Transportation Advisory Committee:

1. Review the FY 2018-19 claim for TDA funds from the Santa Cruz Metropolitan Transit District in the amount of \$7,074,858 and recommend approval by the Regional Transportation Commission; and,
 2. Review the FY 2018-19 claim for State Transit Assistance Funds (STA) funds from the Santa Cruz Metropolitan Transit District in the amount of \$4,211,983.
-

BACKGROUND

The Regional Transportation Commission (RTC) allocates Transportation Development Act (TDA) funds from the region's ¼ cent share of the state's 7.5 cent sales tax according to state law and established formulas in the Commission's Rules and Regulations. State Transit Assistance (STA) funds are generated from the sales tax on diesel fuel and the amount of funds available varies from year to year with the change in diesel fuel prices. Annually the State Controller's Office (SCO) provides an estimate of STA funds for all counties and transit agencies in the state. The RTC's FY 2017-18 draft budget was considered by the RTC Budget and Administration Personnel Committee (B&A/P) in March 2018 and includes TDA and STA apportionments based on the Santa Cruz County Auditor's and State Controller's Office estimates. The B&A/P Committee recommends that the RTC adopt the RTC FY 2018-19 budget at the April 5, 2018 RTC meeting.

DISCUSSION

Transportation Development Act (TDA)

The Regional Transportation Commission (RTC) drafted a FY 2018-19 budget including Transportation Development Act (TDA) allocations for the Santa Cruz Metropolitan Transit District (Metro) in the amount of \$7,074,858. Metro will use FY 2018-19 TDA funding and State Transit Assistance (STA) funding to support Metro's fixed-route public transit operations which requires 80 vehicles and serves 35 routes throughout Santa Cruz County. Metro projects 5,149,811 fixed-route passenger trips in FY 2018-19. Metro will also use TDA funds to provide ParaCruz services, Metro's complementary paratransit service, which operates 38 accessible

vans. Metro projects 86,000 paratransit one way trips in FY 2018-19.

State Transit Assistance Funds (STA)

State Transit Assistance (STA) funds are generated from the sales tax on diesel fuel and the amount of funds available statewide varies from year to year with the change in diesel fuel prices. Annually the State Controller's Office (SCO) provides an estimate of STA funds for all counties and transit agencies in the state. This includes RTC's population-based formula funds (PUC Section 99313) and Santa Cruz Metropolitan Transit District's (METRO) estimated revenue-based formula share (PUC Section 99314). Both the METRO and the RTC-formula allocations of STA funds pass through the RTC budget. METRO's STA Claim is typically combined with its TDA Claim. A total of \$4,211,983 in STA funds are estimated to be available in FY18-19 including: \$1,938,651 in RTC's population-based formula funds, \$1,602,253 in METRO's revenue-based formula share, \$368,417 in State of Good Repair (SGR) program funds allocated to RTC and \$303,622 in SGR program funds allocated to METRO.

Although community transit services, or specialized providers, are not eligible to receive allocations of STA revenue-based (PUC 99314) allocations, through the two-year statewide discussion over what entities can qualify to receive STA funds, RTC staff received clarification that community transportation services (which meet requirements set forth in PUC 99275) are eligible for STA funds as sub-recipients at the discretion of the RTPA (RTC) for the population share (PUC 99313) or at the discretion of an STA-eligible operator for the revenue-based shares (PUC 99314). Because RTC staff previously understood that only Santa Cruz METRO qualified to receive STA funds available in Santa Cruz County, the RTC has historically provided all of the region's STA funds to Santa Cruz Metro. In the fall of 2017, the RTC established an ad-hoc committee to discuss RTC's population-based formula funds (PUC Section 99313) STA allocations for Santa Cruz METRO. At the RTC December 2017 meeting, the ad-hoc committee recommended and the RTC approved that the RTC designate 100% of the region's shares of FY17/18 and FY18/19 STA and SGR funding to Santa Cruz METRO; and then partial reduction of the region's population shares (PUC 99313) of STA and SGR funds to METRO starting in FY19/20 to 85%, FY20/21 - 80%, and FY21/22 - 75% to METRO.

As shown in METRO's draft TDA/STA claim ([Attachment 1](#)), METRO proposes to use most of the \$4,211,983. STA funds on operations, with about \$444,000 designated for capital projects, including facility repairs and improvements, construction projects, vehicle replacements, and ticket vending machines.

Staff recommends that the E&D TAC review the FY 2018-19 claim for TDA funds from the Santa Cruz Metropolitan Transit District and recommend approval by the Regional Transportation Commission; and, review the FY 2018-19 claim for State Transit Assistance funds from the Santa Cruz Metropolitan Transit District.

SUMMARY

The E&D TAC annually reviews Transportation Development Act (TDA) claims for the Santa Cruz Metro, as well as Community Bridges and the Volunteer Center, to ensure that these funds are allocated in accordance with TDA requirements and community needs, and makes recommendations regarding approval of the claims to the Regional Transportation Commission. The Santa Cruz Metro TDA claim also serves as the Santa Cruz Metro State Transit Assistance (STA) fund claim.

Attachment 1: FY 18-19 Santa Cruz Metro TDA and STA Claim

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FY 19 TDA/STA Claim

Santa Cruz Metropolitan Transit District



**Transportation Development Act (TDA) – Local Transportation Funds and
State Transit Assistance (STA)
FY19 AMENDED CLAIM FORM**

Project Information

1. Project Title: FY19 Santa Cruz METRO Operating and Capital Assistance
2. Implementing Agency: Santa Cruz Metropolitan Transit District (METRO)
3. Sponsoring Agency (if different) – must be a TDA Eligible Claimant:

Funding requested this claim:

TDA-LTF (FY17/18)	\$ 7,074,858.00
TDA-STA 99313	\$ 1,938,651
TDA-STA 99314	\$ 1,602,253
SGR 99313	\$ 367,417
SGR 99314	\$ 303,662

4. Fiscal Year (FY) for which funds are claimed: FY19
5. General purpose for which the claim is made, identified by the article and section of the Act which authorizes such claims:
 - ☐ Article 8 Bicycle and/or Pedestrian Facility
 - ☒ Article 4 Public Transportation
 - ☐ Article 8 Specialized Transportation
 - ☐ Article 3 & 8 TDA Admin or Planning
6. Contact Person/Project Manager
Name: Alex Clifford, CEO/General Manager
Telephone Number: (831) 426-6080 E-mail: aclifford@scmtd.com

Secondary Contact (in event primary not available): Thomas Hiltner, Grants/Legislative Analyst
Telephone Number: (831) 420-2580 E-mail: thiltner@scmtd.com
7. Project/Program Description/Scope (use additional pages, if needed, to provide details such as work elements/tasks).

This project provides \$10,323,092 for fixed-route public transit and ADA complementary paratransit operations in Santa Cruz County and \$963,749.00 for capital improvements. Fixed-route public transit operations require a maximum fleet of 75 buses serving 35 routes throughout Santa Cruz County, including the Highway 17 Express AMTRAK feeder service between Santa Cruz and San Jose (Diridon Station). ParaCruz, METRO's complementary paratransit service, operates 36 accessible vans in demand-response service for persons who, due to disability, cannot access the fixed-route system.

FY19 SGR Capital funds (\$671,079) combined with \$292,670 in STA funding transferred into the capital budget to replace and/or refurbish buses beyond their useful lifespan.

8. Project Location/Limits (attach a map and/or photos if available/applicable, include street names):

METRO Service Area



9. Justification for the project: (Why is this project needed? Primary goal/purpose of the project; problem to be addressed; project benefits; importance to the community)

This project provides financial support for fixed-route public transit and paratransit service in Santa Cruz County and critical capital improvement funds to replace and/or refurbish buses which are beyond their useful lifespan. Public transit is lifeline transportation for residents who do not have access to a privately owned vehicle and offers an alternative transportation mode choice for others. Increasing public transit ridership is a goal of the 2040 RTP, and TDA/STA financial assistance is required to sustain current levels of transit service, which will support ridership growth in subsequent years.

While METRO has been successful in obtaining capital grants to replace some of its aging fleet, it still needs additional capital funds to replace the backlog of old buses which need to be replaced. METRO continues to operate buses which are beyond their useful life and is purchasing new, low and no-emission buses to transition to a 100% zero-emission fleet by 2040.

Project Productivity Goals for this fiscal year:

- a. Measures of performance, success or completion to be used to evaluate project/program (ex. increase use of facility/service, decrease collisions, etc.):

Total Annual passenger trips

Operating Cost/Hour

Farebox Recovery Ratio

- b. Number of people to be served/anticipated number of users of project/program (ex. number of new or maintained bike miles; number of people served/rides provided):

For FY19, METRO projects 5,040,480 fixed-route passenger trips based upon a nationwide, declining ridership trend and its full-year FY17 ridership which included the impact of the fall 2016 service reduction. The FY19 ParaCruz ridership estimate is 75,000 one-way trips, slightly lower than the 75,116 carried in FY17.

10. Consistency and relationship with the Regional Transportation Plan (RTP) - Is program/project listed in the RTP and/or consistent with a specific RTP Goal/Policy?

Yes, METRO's FY19 TDA/STA project conforms to these goals and targets in the *2040 RTP, Draft Transportation Goals, Policies and Targets*:

Goal 1: Improve people's ability to meet most of their daily needs without having to drive. Improve access and proximity to employment centers (Attachment 3, p. 1).

Targets:

1A. Increase the percentage of people that can travel to key destinations within a 30-minute walk, bike or transit trip by 20 percent by 2020 and 47 percent by 2040 (Attachment 3, p. 1).

1B. Reduce per capita fuel consumption and greenhouse gas emissions by 1 percent by 2020 and 5 percent by 2035 and 6 percent by 2040. (Attachment 3, p. 1).

1E. Increase the number of active transportation trips by 5 percent of total trips by 2020 and 1 by 20% of all trips by 2040. (Attachment 3, p. 2).

Goal 3: Deliver access and safety improvements cost effectively, within available revenues, equitably and responsive to the needs of all users of the transportation system, and beneficially for the natural environment.

Targets:

3C. Reduce travel times and increase travel options for people who are transportation disadvantaged due to income, age, race, disability or of limited English proficiency by increasing the percentage that are within a 30-minute walk, bike or transit trip to key destinations by 20% by 2020 and 47% by 2040.

11. Impact(s) of project on other modes of travel, if any (ex. parking to be removed):

- Reduce congestion on local streets and roads by providing alternatives to the private automobile.
- Increase range of travel for bicycles by accommodating bikes on buses.
- Provide feeder service to intercity bus, rail and airline network at San Jose.

12. Estimated Project Cost/Budget, including other funding sources, and Schedule: (*attach project budget*). *Specialized Transportation Claims require 10% local match. Local match can take the form of fares, donations, agency charges, grants, revenue sharing and other non-restricted sources. In kind services may NOT apply toward the local match. METRO will contribute \$9,783,049 in farebox revenue, Advertising, rental and interest income to meet the 50% match for operating funds.*

What is the total project cost?

\$49,778,966 for FY19 as published in the adopted *Santa Cruz Metropolitan Transit District FY19 & FY20 Preliminary Operating Budget and FY19 Preliminary Capital Budget*, Attachment A.

Is project fully funded? Yes.

What will TDA (and STA) funds be used on (ex. administration, brochures, engineering, construction)?
Public transit operations; administration; capital improvements.

13. Preferred Method and Schedule for TDA fund distribution (*see RTC Rules and Regulations for details*):

SCMTD: ☒ Quarterly disbursement

14. TDA Eligibility:

	YES?/ NO ?
A. Has the project/program been approved by the claimant's governing body? Form of approval (e.g. resolution, work program, budget, other document) <u>On 3/23/18, the METRO Board adopted the FY19 & FY20 Preliminary Operating Budget for the purpose of submitting the TDA claim in the amounts requested with this claim.</u> If "NO," provide the approximate date approval is anticipated. _____	Yes
B. Has this project previously received TDA funding? (This Project is defined as FY19 operations.)	No
C. For capital projects, have provisions been made by the claimant to maintain the project or facility, or has the claimant arranged for such maintenance by another agency? (If an agency other than the Claimant is to maintain the facility provide its name: _____)	Yes
D. Bike, Ped, and Specialized Transportation Claims: Has the project already been reviewed by the RTC Bicycle Committee and/or Elderly/Disabled Transportation Advisory Committee? (If "NO," project will be reviewed prior to RTC approval).	NA
E. For "bikeways," does the project meet Caltrans minimum safety design criteria pursuant to Chapter 1000 of the California Highway Design Manual? (Available on the internet via: http://www.dot.ca.gov).	NA

SCMTD, CTSA, Bike to Work, CTSC Only – PLEASE KEEP ANSWERS BRIEF

15. Improving Program Efficiency/Productivity

- Describe any areas where special efforts have been made in the **last fiscal year** to reduce operating cost and/or increase ridership/program usage. Note any important trends.
 - METRO established new and expanded contractual services with Cabrillo College and the University of California Santa Cruz to support transit operations serving their campuses. In return, all Cabrillo students can ride METRO's local fixed-route service with no out-of-pocket costs, a significant incentive to increase countywide transit ridership.
 - METRO completed site remediation of the temporary operations yard used while the Judy K. Souza Operations Building was under construction. Eliminating lease payments and completing environmental remediation brings cost savings to the FY19 operation.
 - The FTA awarded METRO \$1.2 million from its FY17 Bus and Bus Infrastructure facilities program to purchase 4 near-zero emission CNG replacement buses.
 - Funds from the State Low Carbon Transit Operations program will fund a fifth, 40' battery-electric bus in METRO's Fleet. Battery-electric buses have demonstrated lower lifecycle costs than diesel or CNG buses due to lower maintenance costs.

- Goals for next fiscal year (ex. identify opportunities to maximize economies of scale, planned productivity improvements). Describe any areas where special efforts will be made to improve efficiency and increase program usage/ridership:
 - Purchase two electric buses to implement the FY16, FY17 and FY18 Low Carbon Transit Operations Program for expanded Watsonville service.
 - Begin rebuilding service from the FY17 service restructuring.
 - Improve on-time performance.
 - Continue pursuit of discretionary grants in state and federal programs.
 - Deploy Automatic Vehicle Locators to provide real-time travel information to customers and improve vehicle dispatch response.

16. What is different from last year's program/claim?

- a. This year's TDA claim is greater than last year's amended claim, \$7,074,858 vs. \$6,767,933. In addition, METRO is claiming new STA-SGR funds to be disbursed quarterly beginning with the first quarter of FY19.

17. Schedule of regular progress reports including an evaluation at the end of the year:

- ☒ SCMD – April each year

SDMTS & RTC Only

18. List the recommendations provided in your last Triennial Performance Audit and your progress toward meeting them.

- *Describe the work your agency has undertaken to implement each performance audit recommendation and the steps it will take to fully implement the recommendation.*
- *For any recommendations that have not been implemented, explain why the recommendation has not been implemented and describe the work your agency will undertake to implement each performance audit recommendation.*
- *Describe any problems encountered in implementing individual recommendations.*

1. **Santa Cruz METRO should prioritize the addition of on-board cameras.**

METRO is currently installing on-board cameras under a contract with Apollo Video, Inc. for approximately \$1 million. Testing and acceptance is scheduled for spring, 2018.

2. **Santa Cruz METRO should prioritize technology investment to continuously track on-time performance.**

METRO is preparing technical specifications for an Automatic Vehicle Locator system, which is funded in part with \$1,400,000 in the FY18 STIP, funds from which will be available by August or September. This system will be deployed in FY19. AVL will enable continuous collection of bus stop arrival and departure times to monitor and correct on-time performance problems.

3. **Santa Cruz METRO should strengthen its marketing program.**

METRO understands the need to "brand" its services and establish a continuous media presence to promote transit ridership; however, METRO has not been able to add a new staff position due to funding constraints. Currently, the Planning and Development Department is leading public outreach, some marketing and media presence with assistance from the Customer Service Department.

SCMTD Only

19. Farebox Recovery Ratio: (split out=urbanized service vs. non-urban service farebox ratios for prior year and year-to-date)

Note: Exemptions for calculating operating costs – spell out in your operating budget summary.

- *Service extensions are exempt until two years after the end of the fiscal year during which they were established (PUC Sec. 99268.8). This exemption applies only if the new service was not provided nor was funded by LTF/STA during any of the prior three fiscal years.*
- *The additional operating costs to a transit operator of providing comparable complementary paratransit services, pursuant to the Americans with Disabilities Act, that exceed operator's prior year costs as adjusted by the CPI are excluded from operating cost.*

The following table shows the project Urban vs. Rural Farebox recovery ratio for FY19. The allocation of fare revenue between rural and urban service is calculated from the estimated FY18 fare revenue/total revenue ratio and budgeted FY19 fare revenue. Costs are allocated by the FY17 ratio of rural operating hours/total operating hours and the FY19 budgeted total cost less ParaCruz operating costs.

Farebox Recovery Ratio: Urban vs. Rural FY18			
Funds	Urbanized		Rural ¹
Fare Revenue	\$	9,498,190	\$ 284,859
Local support Revenues ²	\$	32,947,487	\$ 1,683,044
Operation Costs		43,090,028	2,201,151
Fare Ratio		22.0%	12.9%
Passengers/Year ³		4,930,266	110,214
Cost/Ride	\$	8.74	\$ 19.97

Highway 17 performance factors included in all calculations

¹ FY19 Preliminary Budget fixed-route fares* FY17
rural fares/total fares

² Support Revenue Allocated Rural/Urban by FY17
rural operating hours/total hours

³ FY17 Actual Ridership less 1%

The projected FY19 cost per ride in the urbanized area is \$8.74 and \$19.97 in the rural area. These differences reflect the much lower ridership per hour in the rural areas vs. the urban areas. Highway 17 Express performance measures are included in the urban portion of all calculations

20. FY19 budgeted fare & local support revenue to operating cost ratio versus FY1978-79 ratio (for services to the general public):

- Current ratio ((sum of fare revenues + local support) ÷ operating cost): 69.6%
- FY1978-79 Ratio: 56.9%

21. Did the SCMTD operating budget increase over 15% from the prior fiscal year? NO, the FY19 preliminary operating budget shows an increase of 4.1% over the final FY17 budget.

If the answer is yes, please provide a statement identifying and substantiating the reason or need for the increase in the transit operating budget in excess of 15% above the preceding year, and identify substantial increases or decreases in the scope of operations or capital provisions for major new service - (transit claimants only, if applicable).

22. Operating statistics (compare current fiscal year to date to last three full fiscal years; *TDA required performance indicators), submit items from the following list.

Please see METRO Performance Indicators FY13– FY17 Following

- Annual passengers
 - Rides/passenger trips provided by type (student, senior, adult, pass holders, etc, or however stat's kept) and amount of TDA \$ used for each type of ride.

For FY19, TDA funds will contribute an estimated \$1.28 per fixed-route passenger trip and \$8.50 per ParaCruz passenger trip.

- Annual service hours- Please see Transit Fact Sheet, attached
- Passengers per vehicle service hour*- Please see Transit Fact Sheet, attached
- Annual service miles- Please see Transit Fact Sheet, attached
- # of fixed-route miles- Please see Transit Fact Sheet, attached
- Passengers per vehicle service mile*- Please see Transit Fact Sheet, attached
- Average passengers per weekday
- Total operating costs in budget- Please see Transit Fact Sheet, attached
- Operating cost per vehicle service hour*- Please see Transit Fact Sheet, attached
- Total operating cost per passenger*- Please see Transit Fact Sheet, attached
- Average Farebox Revenue per passenger (describe what is included)- Please see Transit Fact Sheet, attached
- # of FTE employees (all employees, not just drivers) Please see Transit Fact Sheet, attached
- Vehicle Service hours/Employee*- Please see Transit Fact Sheet, attached
- # of routes- Please see Transit Fact Sheet, attached
- Average route length-
- Average travel times/rider
- # of bus stops- Please see Transit Fact Sheet, attached
- # of vehicles in operation- Please see Transit Fact Sheet, attached
- # of monthly bus passes in circulation
- Max vehicles in service at any time: Please see Transit Fact Sheet, attached
- Hours of service: Please see Transit Fact Sheet, attached
- Approximate # of unduplicated passengers
- Cost per unit of service plus text about long range plans to make/keep this low- Please see Transit Fact Sheet, attached.
METRO will continue to provide transit service that balances the needs of the community in a cost efficient manner, including high ridership corridors, geographic coverage, and equitability.
- Funds and percentage spent on administration/overhead/grantee allocation/etc
- Actual financials compared with budget

Santa Cruz METRO Operating Financials					
Operating Expenses	FY13	FY14	FY15	FY16	FY17
Local Fixed-Route Expenses	\$ 32,169,191	\$ 35,141,998	\$ 35,413,642	\$ 36,313,495	\$35,789,455
Highway 17	3,491,147	4,197,527	4,198,933	4,898,213	\$4,415,938
Paratransit	\$ 5,140,727	\$ 5,446,729	\$ 5,515,934	\$ 5,495,018	\$4,904,633
TOTAL Operating Expenses*	\$40,801,065	\$44,786,254	\$45,128,509	\$46,706,726	\$45,110,026
Operating Revenue	FY13	FY14	FY15	FY16	FY17
Fixed-Route Fares	\$ 3,849,089	\$ 3,850,237	\$ 3,759,724	\$ 3,641,890	\$2,849,064
Fares-Contracts	3,249,049	3,336,122	3,647,730	3,726,200	\$4,424,951
Highway 17 Fares	1,471,122	1,500,202	1,547,791	1,816,162	\$1,644,388
Highway 17 Payments	330,265	497,552	511,729	411,842	\$503,961
ParaCruz Fares	304,536	327,498	329,050	327,768	\$298,506
Sales Tax	17,250,072	15,685,172	16,405,582	18,871,648	\$20,869,028
Federal Transit Administration (FTA)	4,909,385	5,719,483	5,690,364	5,626,562	\$6,454,874
Transit Development Act (TDA)	5,507,038	6,244,316	6,444,515	6,377,491	\$6,804,838
State Transit Assistance (STA)	-	5,565,844	5,075,779	2,636,432	\$1,671,333
Misc. Revenue	1,521,788	982,986	1,207,514	1,593,273	\$903,923
Transfers From/(To) Reserves	\$ 2,408,721	\$ 1,076,842	\$ 508,731	\$ 1,677,458	(\$1,314,840)
TOTAL Operating Revenue	\$40,801,065	\$44,786,254	\$45,128,509	\$46,706,726	\$45,110,026
Santa Cruz METRO Operating Statistics					
System Information	FY13	FY14	FY15	FY16	FY17
Directional Route Miles	479.3	479.3	430.59	479	398.37
Number of Bus Stops	957	935	936	936	931
Number of Routes	34	35	36	35	25
Total Active Fleet	111	109	108	98	98
Maximum Bus In-Svc	80	78	83	82	75
Total METRO Employees	320	329	318	329	311
Revenue Hour Per Employee	674	680	709	687	671
Local Fixed-Route Performance	FY13	FY14	FY15	FY16	FY17
Ridership	5,179,457	5,145,862	5,274,631	5,164,160	4,787,727
Revenue Hours	194,512	199,953	201,462	202,112	186,066
Revenue Miles	2,561,028	2,639,606	2,642,511	2,650,889	2,283,490
Passengers Per Hour	26.63	25.74	26.18	25.55	25.73
Passengers Per Mile	2.02	1.95	2.00	1.95	2.10
Passengers Per Capita	21.83	21.69	22.23	21.77	20.18
Revenue Hours Per Capita	0.82	0.84	0.85	0.85	0.78
Revenue Miles Per Capita	10.80	11.13	11.14	11.17	9.63
Total Cost Per Passenger	\$6.21	\$6.83	\$6.71	\$7.03	\$7.48
Revenue Per Passenger	\$1.37	\$1.40	\$1.40	\$1.43	\$1.52
Farebox Recovery	22.07%	20.45%	20.92%	20.29%	20.32%
Highway 17 Performance	FY13	FY14	FY15	FY16	FY17
Ridership	352,824	368,338	379,181	336,809	303,667
Revenue Hours	21,101	23,902	23,893	24,021	22,731
Revenue Miles	610,983	685,566	683,260	686,891	611,805
Passengers Per Hour	16.72	15.41	15.87	14.02	13.36
Passengers Per Mile	0.58	0.54	0.55	0.49	0.50
Passengers Per Capita	1.49	1.55	1.60	1.42	1.28
Revenue Hours Per Capita	0.09	0.10	0.10	0.10	0.10
Revenue Miles Per Capita	2.58	2.89	2.88	2.90	2.58
Total Cost Per Passenger	\$9.89	\$11.40	\$11.07	\$14.54	\$14.54
Revenue Per Passenger	\$5.11	\$5.42	\$5.43	\$6.62	\$7.07
Farebox Recovery	51.6% **	47.59% **	49.05% **	37.08%	37.24%
Fixed-Route Total Performance	FY13	FY14	FY15	FY16	FY17
Ridership	5,532,281	5,514,200	5,653,812	5,500,969	5,091,394
Revenue Hours	215,613	223,855	225,355	226,135	208,797
Revenue Miles	3,172,011	3,325,172	3,325,771	3,337,779	2,895,295
Passengers Per Hour	25.66	24.63	25.09	24.33	24.38
Passengers Per Mile	1.74	1.66	1.70	1.65	1.76
Passengers Per Capita	24.81	24.80	25.43	24.61	22.74
Revenue Hours Per Capita	1.00	1.04	1.05	1.05	0.98
Revenue Miles Per Capita	13.37	14.02	14.02	14.07	12.20
Total Cost Per Passenger	\$ 6.45	\$ 7.13	\$ 7.01	\$ 7.49	\$ 7.90
Revenue Per Passenger	\$ 1.61	\$ 1.67	\$ 1.67	\$ 1.74	\$ 1.85
Farebox Recovery	24.96%	23.35%	23.90%	23.28%	23.44%
Subsidy Per Passenger	\$ 4.84	\$ 5.47	\$ 5.33	\$ 5.75	\$ 6.05
Cost Per Revenue Hour	\$ 165.39	\$ 175.74	\$ 175.78	\$ 182.24	\$ 192.56
ParaCruz Performance	FY13	FY14	FY15	FY16	FY17
Ridership	90,492	96,868	98,096	85,768	75,116
Revenue Hours	45,678	48,714	48,995	44,918	39,474
Revenue Miles	418,781	481,345	531,250	488,017	456,208
Passengers Per Hour	1.98	1.99	2.00	1.91	1.90
Passengers Per Mile	0.22	0.20	0.18	0.18	0.16
Passengers Per Capita	0.38	0.41	0.41	0.36	0.32
Revenue Hours Per Capita	0.19	0.21	0.21	0.19	0.17
Revenue Miles Per Capita	1.77	2.03	2.24	2.06	1.92
Total Cost Per Passenger	\$ 56.81	\$ 56.23	\$ 56.23	\$ 64.07	\$ 65.29
Revenue Per Passenger	\$ 3.37	\$ 3.38	\$ 3.35	\$ 3.82	\$ 3.97
Farebox Recovery	5.92%	6.01%	5.97%	5.96%	6.09%
Subsidy Per Passenger	\$ 53.44	\$ 52.85	\$ 52.88	\$ 60.25	\$ 61.32
Cost Per Revenue Hour	\$ 112.54	\$ 111.81	\$ 112.58	\$ 122.33	\$ 124.25

* Expenses do not include year-end Depreciation, W/C IBNR, GASB 45 OPEB adjustments, or GASB 68 Pension adjustments

** Highway 17 Farebox Recovery including Highway 17 Payments

Documentation to Include with your Claim:

All Claims

- ☐ **A letter of transmittal** addressed to the SCCRTC Executive Director that attests to the accuracy of the claim and all its accompanying documentation.
- ☐ **Statement from the TDA Eligible Claimant** indicating its role and responsibilities.

Article 8 Bicycle/Pedestrian Claims

- ☐ Evidence of environmental review for capital projects

All Transit and Specialized Transportation Claims (*SCMTD, CTSA, and Volunteer Center*)

- ☐ **A copy of the operating and capital budgets for the coming fiscal year**
- ☐ **Description of capital projects**, including time frame over which project will be funded and implemented
- ☐ **Operating Plan** for current and upcoming activities – can be within project description

Article 4 Transit Claims

- ☐ **A certification from the California Highway Patrol** (completed within the last 13 months) indicating that the operator is in compliance with Section 1808.1 of the Vehicle Code.
- ☐ **Other Certifications**

Local Agency Certification:

This TDA Claim has been prepared in accordance with the SCCRTC's Budget, SCCRTC's Rules and Regulations, and Caltrans TDA Guidebook (<http://www.dot.ca.gov/hq/MassTrans/State-TDA.html>). I certify that the information provided in this form is accurate and correct. I understand that if the required information has not been provided this form may be returned and the funding allocation may be delayed.

Signature _____

Title: CEO/General Manager

Date: April 6, 2018



FY 19 TDA/STA Claim

Santa Cruz Metropolitan Transit District

FY 19 & FY20 Preliminary Operating Budget

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FY18 & FY19 PRELIMINARY OPERATING BUDGET
REVENUE SOURCES**

	REVENUE SOURCE	Jun-16 BUDGET FY17	Mar-17 BUDGET FY18	% CHANGE BUDG FY17 BUDG FY18	\$ CHANGE BUDG FY17 BUDG FY18	Mar-17 BUDGET FY19	% CHANGE BUDG FY18 BUDG FY19	\$ CHANGE BUDG FY18 BUDG FY19
1	Passenger Fares	3,681,471	2,791,893	-24.2%	(889,578)	2,791,893	0.0%	-
2	Special Transit Fares	5,418,017	5,044,644	-6.9%	(373,373)	5,044,644	0.0%	-
3	Paratransit Fares	339,141	339,141	0.0%	-	339,141	0.0%	-
4	Highway 17 Fares	1,826,000	1,758,751	-3.7%	(67,249)	1,758,751	0.0%	-
5	Highway 17 Payments	525,000	525,000	0.0%	-	525,000	0.0%	-
6	<i>Estimated Reduction in Fares due to Service Cuts</i>	(500,000)	-	-100.0%	500,000	-	0.0%	-
7	Commissions	2,000	1,500	-25.0%	(500)	1,500	0.0%	-
8	Advertising Income	275,000	225,000	-18.2%	(50,000)	225,000	0.0%	-
9	Rent Income	150,000	154,301	2.9%	4,301	158,644	2.8%	4,343
10	Interest Income	80,000	90,000	12.5%	10,000	90,000	0.0%	-
11	Other Non-Transp Revenue	13,000	20,592	58.4%	7,592	20,592	0.0%	-
12	1979 Gross Sales Tax (1/2 cent)	19,572,494	20,061,806	2.5%	489,312	20,563,351	2.5%	501,545
13	2016 Net Sales Tax (Measure D)	6,701,163	6,974,959	4.1%	273,796	3,053,369	2.5%	74,472
14**	Transp Dev Act (TDA - LTF) Funds	4,246,793	4,131,857	-2.7%	(114,936)	7,149,333	2.5%	174,374
15	FTA Sec 5307 - Op Assistance	166,738	172,322	3.3%	5,584	4,222,345	2.2%	90,488
16	FTA Sec 5311 - Rural Op Asst	73,000	10,000	-86.3%	(63,000)	175,941	2.1%	3,619
17	AMBAG/Misc. Grant Funding	2,125,425	2,210,167	4.0%	84,742	10,000	0.0%	-
18	STIC	-	(884,067)	100.0%	(884,067)	2,220,000	0.4%	9,833
19	STIC (Transfer to Capital Budget)	-	-	0.0%	-	(1,332,000)	50.7%	(447,933)
20	STA - SLPP Backfill for Metro Base	1,995,540	1,973,568	-1.1%	(21,972)	-	0.0%	-
21	TDA - STA - Operating (Current Year)	(370,000)	(789,427)	113.4%	(419,427)	1,973,568	0.0%	-
22	TDA - STA - Operating (Current Year) (Transfer to Capital Budget)	-	-	0.0%	-	(1,184,141)	50.0%	(394,714)
23	Low Carbon Transit Operations Program (LCTOP)	638,208	657,354	3.0%	19,146	677,075	3.0%	19,721
24	Fuel Tax Credit	(638,208)	(657,354)	3.0%	(19,146)	(677,075)	3.0%	(19,721)
25	Fuel Tax Credit (Transfer to Reserves)	-	-	0.0%	-	-	0.0%	-
26	Medicare Subsidy	358,207	(164,346)	-145.9%	(522,553)	922,627	-661.4%	1,086,973
27	Transfer (to)/from Operations Sustainability Reserve	-	-	-	-	-	-	-
TOTAL REVENUE		46,678,989	47,626,559	2.0%	947,570	48,729,559	2.3%	1,103,000

** FTA funding is used solely to fund labor expense

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FY18 & FY19 PRELIMINARY OPERATING BUDGET**

Consolidated Expenses

ACCOUNT	Jun-16 BUDGET FY17	Mar-17 BUDGET FY18	% CHANGE BUDG FY17 BUDG FY18	\$ CHANGE BUDG FY17 BUDG FY18	Mar-17 BUDGET FY19	% CHANGE BUDG FY18 BUDG FY19	\$ CHANGE BUDG FY18 BUDG FY19
LABOR							
501011 Bus Operator Pay	8,501,290	8,535,556	0.4%	34,266	8,764,248	2.7%	228,692
501013 Bus Operator OT	1,187,022	1,225,000	3.2%	37,978	1,257,806	2.7%	32,806
501021 Other Salaries	7,716,615	7,694,455	-0.3%	(22,160)	7,825,592	1.7%	131,137
501023 Other OT	443,279	425,010	-4.1%	(18,269)	433,294	1.9%	8,284
Totals	17,848,206	17,880,021	0.2%	31,815	18,280,940	2.2%	400,919
FRINGE BENEFITS							
502011 Medicare/Soc. Sec.	309,888	313,521	1.2%	3,633	319,991	2.1%	6,470
502021 Retirement	4,461,531	4,737,369	6.2%	275,838	5,095,212	7.6%	357,843
502031 Medical Ins	10,165,186	10,445,543	2.8%	280,357	10,910,517	4.5%	464,975
502041 Dental Ins	491,596	501,057	1.9%	9,461	516,089	3.0%	15,032
502045 Vision Ins	120,401	129,454	7.5%	9,053	133,338	3.0%	3,884
502051 Life Ins/AD&D	49,374	44,808	-9.2%	(4,566)	46,082	2.8%	1,274
502060 State Disability Ins (SDI)	200,439	191,122	-4.6%	(9,317)	201,207	5.3%	10,085
502061 Long Term Disability Ins	142,485	148,953	4.5%	6,469	155,659	4.5%	6,706
502071 State Unemployment Ins (SUI)	73,786	55,125	-25.3%	(18,661)	58,389	5.9%	3,264
502081 Worker's Comp Ins	850,000	875,500	3.0%	25,500	901,766	3.0%	26,266
502101 Holiday Pay	602,251	610,721	1.4%	8,470	623,187	2.0%	12,466
502103 Floating Holiday	93,689	93,442	-0.3%	(247)	94,707	1.4%	1,265
502109 Sick Leave	924,456	936,909	1.3%	12,453	956,062	2.0%	19,153
502111 Annual Leave	1,934,900	1,840,795	-4.9%	(94,104)	1,886,394	2.5%	45,598
502121 Other Paid Absence	177,085	179,233	1.2%	2,148	146,059	-18.5%	(33,174)
502251 Phys. Exams	14,110	14,280	1.2%	170	14,280	0.0%	-
502253 Driver Lic Renewal	4,656	4,956	6.4%	300	4,956	0.0%	-
502999 Other Fringe Benefits	58,542	57,315	-2.1%	(1,227)	57,890	1.0%	576
Totals	20,674,374	21,180,103	2.4%	505,729	22,121,787	4.4%	941,683

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FY18 & FY19 PRELIMINARY OPERATING BUDGET**

Consolidated Expenses

ACCOUNT	Jun-16 BUDGET FY17	Mar-17 BUDGET FY18	% CHANGE BUDG FY17 BUDG FY18	\$ CHANGE BUDG FY17 BUDG FY18	Mar-17 BUDGET FY19	% CHANGE BUDG FY18 BUDG FY19	\$ CHANGE BUDG FY18 BUDG FY19
SERVICES							
503011 Acting/Audit Fees	95,250	95,250	0.0%	-	95,250	0.0%	-
503012 Admin/Bank Fees	372,880	380,500	2.0%	7,620	389,640	2.4%	9,140
503031 Prof/Technical Fees	447,560	803,179	79.5%	355,619	486,100	-39.5%	(317,079)
503032 Legislative Services	101,000	101,000	0.0%	-	101,000	0.0%	-
503033 Legal Services	106,396	350,000	229.0%	243,604	350,000	0.0%	-
503034 Pre-Employment Exams	5,800	6,600	13.8%	800	6,600	0.0%	-
503041 Temp Help	-	-	0.0%	-	-	0.0%	-
503161 Custodial Services	6,468	8,300	28.3%	1,832	8,300	0.0%	-
503162 Uniforms/Laundry	24,280	24,150	-0.5%	(130)	24,150	0.0%	-
503171 Security Services	505,323	515,600	2.0%	10,277	525,600	1.9%	10,000
503221 Classified/Legal Ads	12,200	13,200	8.2%	1,000	13,200	0.0%	-
503222 Legal Ads	-	-	0.0%	-	-	0.0%	-
503225 Graphic Services	5,500	-	100.0%	(5,500)	-	0.0%	-
503351 Repair - Bldg & Impr	48,590	50,000	2.9%	1,410	50,000	0.0%	-
503352 Repair - Equipment	651,768	622,800	-4.4%	(28,968)	633,100	1.7%	10,300
503353 Repair - Rev Vehicle	652,000	326,500	-49.9%	(325,500)	326,500	0.0%	-
503354 Repair - Non Rev Vehicle	30,000	30,000	0.0%	-	30,000	0.0%	-
503363 Haz Mat Disposal	40,452	48,400	19.6%	7,948	48,400	0.0%	-
Totals	3,105,467	3,375,479	8.7%	270,012	3,087,840	-8.5%	(287,639)
MOBILE MATERIALS & SUPPLIES							
504011 Fuels & Lubricants - Non Rev Veh	90,000	60,000	-33.3%	(30,000)	60,000	0.0%	-
504012 Fuels & Lubricants - Rev Veh	1,798,656	1,800,000	0.1%	1,344	1,800,000	0.0%	-
504021 Tires & Tubes	300,000	300,000	0.0%	-	300,000	0.0%	-
504161 Other Mobile Supplies	-	-	0.0%	-	-	0.0%	-
504191 Rev Vehicle Parts	621,886	733,500	17.9%	111,614	733,500	0.0%	-
Totals	2,810,542	2,893,500	3.0%	82,958	2,893,500	0.0%	-

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FY18 & FY19 PRELIMINARY OPERATING BUDGET**

Consolidated Expenses

ACCOUNT	Jun-16 BUDGET FY17	Mar-17 BUDGET FY18	% CHANGE BUDG FY17 BUDG FY18	\$ CHANGE BUDG FY17 BUDG FY18	Mar-17 BUDGET FY19	% CHANGE BUDG FY18 BUDG FY19	\$ CHANGE BUDG FY18 BUDG FY19
OTHER MATERIALS & SUPPLIES							
504205 Freight Out	136	2,500	1738.2%	2,364	2,500	0.0%	-
504211 Postage & Mailing	13,550	12,300	-9.2%	(1,250)	12,300	0.0%	-
504214 Promotional Items	1,400	7,200	414.3%	5,800	7,200	0.0%	-
504215 Printing	50,805	48,850	-3.8%	(1,955)	50,750	3.9%	1,900
504217 Photo Supp/Process	2,500	1,500	-40.0%	(1,000)	1,500	0.0%	-
504311 Office Supplies	71,062	71,800	1.0%	738	69,800	-2.8%	(2,000)
504315 Safety Supplies	16,860	11,320	-32.9%	(5,540)	11,320	0.0%	-
504317 Cleaning Supplies	53,830	48,600	-9.7%	(5,230)	48,600	0.0%	-
504409 Repair/Maint Supplies	114,983	110,500	-3.9%	(4,483)	110,500	0.0%	-
504417 Tenant Repairs	9,000	9,000	0.0%	-	9,000	0.0%	-
504421 Non-Inventory Parts	39,730	58,000	46.0%	18,270	58,000	0.0%	-
504511 Small Tools	7,736	9,500	22.8%	1,764	9,500	0.0%	-
504515 Employee Tool Replacement	2,180	3,000	37.6%	820	3,000	0.0%	-
Totals	383,772	394,070	2.7%	10,298	393,970	0.0%	(100)
UTILITIES							
505011 Gas & Electric	297,000	304,000	2.4%	7,000	304,000	0.0%	-
505021 Water & Garbage	147,240	147,400	0.1%	160	147,400	0.0%	-
505031 Telecommunications	160,434	157,600	-1.8%	(2,834)	157,600	0.0%	-
Totals	604,674	609,000	0.7%	4,326	609,000	0.0%	-
CASUALTY & LIABILITY							
506011 Insurance - Property	61,904	61,737	-0.3%	(167)	62,971	2.0%	1,234
506015 Insurance - PL/PD	314,929	417,144	32.5%	102,215	458,859	10.0%	41,715
506021 Insurance - Other	-	50,000	100.0%	50,000	50,000	0.0%	-
506123 Settlement Costs	150,000	150,000	0.0%	-	150,000	0.0%	-
506127 Repairs - District Prop	-	-	0.0%	-	-	0.0%	-
Totals	526,833	678,881	28.9%	152,048	721,830	6.3%	42,949

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FY18 & FY19 PRELIMINARY OPERATING BUDGET**

Consolidated Expenses

ACCOUNT	Jun-16 BUDGET FY17	Mar-17 BUDGET FY18	% CHANGE BUDG FY17 BUDG FY18	\$ CHANGE BUDG FY17 BUDG FY18	Mar-17 BUDGET FY19	% CHANGE BUDG FY18 BUDG FY19	\$ CHANGE BUDG FY18 BUDG FY19
TAXES							
507051 Fuel Tax	14,280	15,000	5.0%	720	15,000	0.0%	-
507201 Licenses & Permits	19,296	20,852	8.1%	1,556	21,140	1.4%	288
507999 Other Taxes	14,400	14,400	0.0%	-	14,400	0.0%	-
Totals	47,976	50,252	4.7%	2,276	50,540	0.6%	288
PURCHASED TRANS.							
503406 Contract/Paratransit	150,000	75,000	-50.0%	(75,000)	75,000	0.0%	-
Totals	150,000	75,000	-50.0%	(75,000)	75,000	0.0%	-
MISC EXPENSE							
509011 Dues/Subscriptions	93,985	80,080	-14.8%	(13,905)	80,080	0.0%	-
509081 Advertising - District Promo	30,500	-	-100.0%	(30,500)	-	0.0%	-
509101 Employee Incentive Program	15,200	19,100	25.7%	3,900	19,100	0.0%	-
509121 Employee Training	71,660	65,073	-9.2%	(6,587)	65,273	0.3%	200
509122 BOD Travel	3,000	8,000	166.7%	5,000	8,000	0.0%	-
509123 Travel	74,935	69,705	-7.0%	(5,230)	67,705	-2.9%	(2,000)
509125 Local Meeting Expense	6,520	10,300	58.0%	3,780	10,300	0.0%	-
509127 Board Director Fees	12,600	12,600	0.0%	-	12,600	0.0%	-
509150 Contributions	-	-	0.0%	-	-	0.0%	-
509198 Cash Over/Short	-	-	0.0%	-	-	0.0%	-
509999 Other Misc Expense	-	-	0.0%	-	-	0.0%	-
Totals	308,400	264,858	-14.1%	(43,542)	263,058	-0.7%	(1,800)
LEASES & RENTALS							
512011 Facility Lease	201,350	208,100	3.4%	6,750	214,800	3.2%	6,700
512061 Equipment Rental	17,394	17,294	-0.6%	(100)	17,294	0.0%	-
Totals	218,744	225,394	3.0%	6,650	232,094	3.0%	6,700
PERSONNEL TOTAL	38,522,581	39,060,125	1.4%	537,543	40,402,727	3.4%	1,342,602
NON-PERSONNEL TOTAL	8,156,408	8,566,434	5.0%	410,026	8,326,832	-2.8%	(239,602)
TOTAL OPERATING EXPENSES	46,678,989	47,626,559	2.0%	947,569	48,729,559	2.3%	1,103,000

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT
FY18 & FY19 PRELIMINARY OPERATING BUDGET**

Departmental Expenses

DEPARTMENT	Jun-16	Mar-17	% CHANGE	\$ CHANGE	Mar-17	% CHANGE	\$ CHANGE	% CHANGE	\$ CHANGE
	BUDGET FY17	BUDGET FY18	BUDG FY17 BUDG FY18	BUDG FY17 BUDG FY18	BUDGET FY19	BUDG FY18 BUDG FY19	BUDG FY18 BUDG FY19	BUDG FY18 BUDG FY19	BUDG FY18 BUDG FY19
1100 Administration	1,237,481	1,387,380	12.1%	149,899	1,303,319	-6.1%	(84,061)		
1200 Finance	1,790,079	2,170,226	21.2%	380,147	2,195,074	1.1%	24,848		
1300 Customer Service	900,222	1,189,225	32.1%	289,002	1,225,813	3.1%	36,588		
1400 Human Resources	688,988	850,822	23.5%	161,834	870,216	2.3%	19,394		
1500 Information Technology	1,106,484	1,146,885	3.7%	40,401	1,167,271	1.8%	20,386		
Planning, Grants,									
1600 Governmental Affairs	831,061	957,330	15.2%	126,269	874,879	-8.6%	(82,451)		
1700 District Counsel	619,225	568,280	-8.2%	(50,945)	575,742	1.3%	7,463		
1800 Risk Management	973,366	405,842	-58.3%	(567,524)	420,981	3.7%	15,139		
1900 Purchasing	894,698	925,219	3.4%	30,521	959,776	3.7%	34,557		
2200 Facilities Maintenance	2,801,428	2,786,946	-0.5%	(14,482)	2,842,615	2.0%	55,669		
3100 Paratransit Program	5,088,359	4,463,223	-12.3%	(625,136)	4,618,930	3.5%	155,707		
3200 Operations	2,076,115	2,649,916	27.6%	573,801	2,740,869	3.4%	90,953		
3300 Bus Operators	16,387,910	16,824,957	2.7%	437,047	17,402,524	3.4%	577,568		
4100 Fleet Maintenance	8,052,047	7,981,550	-0.9%	(70,497)	8,070,390	1.1%	88,840		
5100 Capital Funded Labor	-	-	0.0%	-	-	0.0%	-		
9001 Cobra Benefits	-	-	0.0%	-	-	0.0%	-		
9005 Retired Employee Benefits	3,231,276	3,318,508	2.7%	87,232	3,460,908	4.3%	142,400		
700 SCCIC	250	250	0.0%	-	250	0.0%	-		
TOTAL OPERATING EXPENSES	46,678,989	47,626,559	2.0%	947,569	48,729,559	2.3%	1,103,000		

SCMTD REVENUE RATIO FY18 budget

FARES:

Passenger Fares	\$	2,615,934
Special Transit Fares	\$	5,381,772
Paratransit Fares		305,597
Highway 17 Fares		1,479,746
<i>Total Fares</i>		9,783,049

TAXES

Sales Tax		
<i>Sales Tax</i>		21,636,231
<i>Measure D</i>		3,211,251
TOTAL LOCAL REVENUE	\$	34,630,531
OPERATING EXPENSE	\$	49,778,966
REVENUE RATIO FY18		69.6%

Farebox Recovery Ratio 19.7%

Farebox Recovery Ratio: Urban vs. Rural FY18

Funds	Urbanized	Rural ¹
Fare Revenue	\$ 9,498,190	\$ 284,859
Local support Revenues ²	\$ 32,947,487	\$ 1,683,044
Operation Costs	43,090,028	2,201,151
Fare Ratio	22.0%	12.9%
Passengers/Year ³	4,930,266	110,214
Cost/Ride	\$ 8.74	\$ 19.97

Highway 17 performance factors included in all calculations

¹ FY19 Preliminary Budget fixed-route fares* FY17 rural fares/total fares

² Support Revenue Allocated Rural/Urban by FY17 rural operating hours/total hours

³ FY17 Actual Ridership less 1%

	Fixed-route	ParaCruz
TDA Revenue	\$ 6,437,029.25	\$ 637,829
TDA Revenue/trip	\$ 1.28	\$ 8.50



FY 19 TDA Claim

Santa Cruz Metropolitan Transit District

FY19 Preliminary Capital Budget

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT													
FY18 PRELIMINARY CAPITAL BUDGET													
AS OF MARCH 24, 2017													
PROJECT/ACTIVITY	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	UNRESTRICTED	
	FEDERAL FUNDS	SAKATA/LAW SUIT PROCEEDS	PTMISEA (1B)	PTMISEA (1B) + INT-PAC STATION PLACEHOLDER	CAL-OES PROP 1B - TRANSIT SECURITY	STIP	LC TOP	CAPITAL RESTRICTED STA	STA XFRs FROM OPER BUDGET)	(ALT) FUEL TAX CREDIT (XFR FROM OPER BUDGET)	CASH RESERVES	TOTAL	
CAPITAL PROGRAM FUNDING													
Federal Sources of Funds:													
Federal Grants (FTA)	\$ 5,746,168											\$ 5,746,168	
Surface Transportation Block Grant (STBG)	\$ 500,000											\$ 500,000	
Sakata / Lawsuit Proceeds		\$ 120,000										\$ 120,000	
State Sources of Funds:													
PTMISEA (1B)			\$ 390,000	\$ 5,991,793								\$ 6,381,793	
Cal-OES Prop 1B Transit Security Grant Funds (CTSGP)					\$ 1,075,000							\$ 1,075,000	
Statewide Transportation Improvement Program (STIP)						\$ 247,950						\$ 247,950	
Low Carbon Transit Operations Program (LCTOP)							\$ 709,292					\$ 709,292	
Capital Restricted - State Transit Assistance (STA)								\$ 44,760				\$ 44,760	
State Transit Assistance (STA) - (1/5 of FY17 Allocation-Xfr from Oper. Budget)									\$ 399,682			\$ 399,682	
Local Sources of Funds:													
(Alternative) Fuel Tax Credit (Xfr from Oper.Budget)										\$ 549,167		\$ 549,167	
Operating and Capital Reserve Fund												\$ 16,277	\$ 16,277
TOTAL CAPITAL FUNDING BY FUNDING SOURCE	\$ 6,246,168	\$ 120,000	\$ 390,000	\$ 5,991,793	\$ 1,075,000	\$ 247,950	\$ 709,292	\$ 44,760	\$ 399,682	\$ 549,167	\$ 16,277	\$ 15,790,089	
Restricted Funds	\$ 6,246,168	\$ 120,000	\$ 390,000	\$ 5,991,793	\$ 1,075,000	\$ 247,950	\$ 709,292	\$ 44,760				\$ 14,824,963	
Unrestricted Funds									\$ 399,682	\$ 549,167	\$ 16,277	\$ 965,126	
TOTAL CAPITAL FUNDING	\$ 6,246,168	\$ 120,000	\$ 390,000	\$ 5,991,793	\$ 1,075,000	\$ 247,950	\$ 709,292	\$ 44,760	\$ 399,682	\$ 549,167	\$ 16,277	\$ 15,790,089	
* Using Toll Credits as the local match for the FTA 5339a (FY15/16) Formula Bus & Bus Facilities Grant = no cash contribution from METRO													

TO: Elderly and Disabled Transportation Advisory Committees

FROM: Grace Blakeslee, Transportation Planner

RE: Measure D: Community Bridges/Lift Line Five-Year Plan

RECOMMENDATIONS

Staff recommends that the Elderly and Disabled Transportation Advisory Committee (E&D TAC):

1. Review the Five-Year Plan for the Measure D: Transit Seniors and People Living with Disabilities investment category direct allocation to Community Bridges Lift-Line paratransit service.
-

BACKGROUND

Measure D, the transportation ballot measure passed by more than a 2/3 majority of Santa Cruz County voters on November 8, 2016, provides funding for five categories of projects: neighborhood projects (30% of net measure revenues), highway corridors (25%), transportation for seniors and people with disabilities (20%), active transportation (17%), and preservation and analysis of the rail corridor (8%).

Each agency receiving Measure D revenue is required to annually develop, update, and hold a public hearing to adopt a five-year program of projects, identifying how they will deliver Measure D projects in the upcoming five years. After the close of each fiscal year, agencies must submit an annual report describing actual expenditures, progress made to improve the transportation system, how maintenance of effort requirements have been met to ensure Measure D revenues are supplementing (not supplanting) other revenues, and the degree that Measure D funds were used to secure additional funding from other sources (leveraging other funds). The Measure D annual fiscal audit and Taxpayer Oversight Committee and will review the annual report of expenditures to ensure funds were expended consistent with the requirements of Measure D. The annual reports, including the program of projects approved by each agency, will be posted on the RTC's Measure D website.

DISCUSSION

Twenty percent of net Measure D revenues are designated for the Transit for Seniors and People Living with Disabilities category. Four percent of revenues are

allocated to the Consolidated Transportation Services Agency (CTSA) for Santa Cruz County for paratransit service. Community Bridges-Lift Line serves as the CTSA for Santa Cruz County. The remaining 16% of net Measure D revenues under the Transit for Seniors and People Living with Disabilities investment category are allocated to the Santa Cruz Metropolitan Transit District. As noted in the Expenditure Plan, paratransit services work with social service agencies to increase transportation options for seniors, individuals with disabilities, and persons with low incomes.

The Measure D five-year funding projection (FY18-FY23) for direct allocation to Community Bridges-Lift Line is estimated to be \$3,985,629 for the five-year period with an average annual distribution of \$797,125 ([Attachment 1](#)). The draft five-year plan covering the period FY18-19 through FY22-23 for the direct allocation of Measure D to Community Bridges-Lift Line paratransit services is attached ([Attachments 2-3](#)). The draft five-year plan distributes the direct allocation as follows:

- 30% for two driver positions to provide door-to-door service for elderly and/or physically or mentally limited and/or ill passengers. Drivers operate the vehicles, keep simple records, and maintain the van in a clean, safe, and orderly condition and perform other related work as required;
- 9% for a new van driver trainer who will supervise van drivers and provide all phases of training for drivers, including preparing van driver trainees for promotion to van driver and ongoing retraining;
- 7% for an administrative assistant and dispatcher to provide administrative support including clerical support, receiving and screening telephone calls, maintaining records, preparing statistics reports, correspondence and coordination of tasks and scheduling when needed to provide support to the van drivers;
- 1% for outreach and publicity to provide materials and videos to promote paratransit ride availability;
- 49% for operations and facility reserve to purchase property and construct an operations facility that will house the entire Lift Line operations in one location or for increases in facility leases, including relocation if needed ([Attachment 3](#)); and,
- 4% for vehicle and equipment reserve to purchase two new fleet vehicles, including on one 24-passenger replacement bus and one electric vehicle, and replace aging and worn shop improvement or upgrades to the maintenance and operations facility ([Attachment 3](#)).

Community Bridges-Lift Line is the only agency receiving a direct allocation of Measure D fund that is not a public agency. Review and approval of Community Bridges Lift Line Measure D five-year plan will be overseen by the Regional Transportation Commission (RTC) and included in the RTC's public review process. The Measure D annual update for the 2017 is included as [Attachment 4](#).

RTC staff recommends that the Elderly and Disabled Transportation Advisory Committee review and provide input on this plan. The RTC board is scheduled to review Community Bridges-Lift Line Measure D five-year plan at the

May 3, 2018 RTC meeting and then considered approval following a public hearing at its June 7, 2018 meeting. This plan will be adjusted annually based on updated project schedule and cost information, as well as information on any grants and other funds agencies are able to secure for the projects. Since annual revenues are sometimes insufficient for larger projects, agencies sometimes need to carry over or “bank” revenues to future years.

SUMMARY

Measure D requires recipient agencies to annually prepare and update a five-year program of projects, identifying how agencies plan to spend Measure D funds. Staff recommends that the Elderly and Disabled Transportation Advisory Committee (E&D TAC) review and provide input on the Five-Year Plan for the Measure D: Transit Seniors and People Living with Disabilities investment category direct allocation to Community Bridges Lift-Line paratransit service.

Attachments:

1. Measure D Transactions & Use Tax 30-year Revenue Projections for 2018
2. Community Bridges Lift Line Paratransit Service 5-year program of projects
3. Community Bridges Lift Line Major Project: Lift Line Operations Facility and Lift Line Vehicle and Equipment Acquisition 5-year plans
4. Community Bridges Lift Line Measure D Annual Update

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Measure D Transactions & Use Tax 30-year Revenue Projections for 2018

Fiscal Year	Annual Estimate	Implemt, Mgmt & Admin	Net for Allocation	Neighborhood Projects 30%	Distribution of Neighborhood Projects Bucket						Highway 25%	SC METRO 16%	Comm Bridges 4%	Trail 17%	Rail 8%
					Highways 9 & 17 \$15Mtotal	Capitola	Santa Cruz	Scotts Valley	Watsonville	County Unincorp					
2016-17	1,152,905	346,687	806,219	241,866	41,667	11,254	45,453	9,808	30,413	103,271	201,555	128,995	32,249	137,057	64,497
2017-18	19,842,749	560,000	19,282,749	5,784,825	500,000	297,076	1,199,872	258,914	802,828	2,726,135	4,820,687	3,085,240	771,310	3,278,067	1,542,620
2018-19	20,100,705	684,000	19,416,705	5,825,012	500,000	301,231	1,200,577	266,384	806,931	2,749,889	4,854,176	3,106,673	776,668	3,300,840	1,553,336
2019-20	20,362,014	692,892	19,669,122	5,900,737	500,000	305,514	1,217,650	270,172	818,406	2,788,994	4,917,281	3,147,060	786,765	3,343,751	1,573,530
2020-21	20,626,720	701,900	19,924,821	5,977,446	500,000	309,854	1,234,945	274,009	830,030	2,828,608	4,981,205	3,187,971	796,993	3,387,220	1,593,986
2021-22	20,894,868	711,024	20,183,843	6,055,153	500,000	314,249	1,252,465	277,897	841,806	2,868,737	5,045,961	3,229,415	807,354	3,431,253	1,614,707
2022-23	21,166,501	720,268	20,446,233	6,133,870	500,000	318,702	1,270,212	281,834	853,734	2,909,387	5,111,558	3,271,397	817,849	3,475,860	1,635,699
2023-24	21,441,666	729,631	20,712,034	6,213,610	500,000	323,213	1,288,191	285,823	865,818	2,950,566	5,178,009	3,313,926	828,481	3,521,046	1,656,963
2024-25	21,720,407	739,116	20,981,291	6,294,387	500,000	327,783	1,306,403	289,864	878,058	2,992,280	5,245,323	3,357,007	839,252	3,566,819	1,678,503
2025-26	22,002,772	748,725	21,254,048	6,376,214	500,000	332,412	1,324,851	293,958	890,458	3,034,536	5,313,512	3,400,648	850,162	3,613,188	1,700,324
2026-27	22,288,809	758,458	21,530,350	6,459,105	500,000	337,101	1,343,540	298,104	903,019	3,077,341	5,382,588	3,444,856	861,214	3,660,160	1,722,428
2027-28	22,578,563	768,318	21,810,245	6,543,073	500,000	341,851	1,362,471	302,305	915,743	3,120,704	5,452,561	3,489,639	872,410	3,707,742	1,744,820
2028-29	22,872,084	778,306	22,093,778	6,628,133	500,000	346,662	1,381,649	306,560	928,633	3,164,629	5,523,445	3,535,004	883,751	3,755,942	1,767,502
2029-30	23,169,421	788,424	22,380,997	6,714,299	500,000	351,537	1,401,076	310,870	941,690	3,209,126	5,595,249	3,580,960	895,240	3,804,770	1,790,480
2030-31	23,470,624	798,674	22,671,950	6,801,585	500,000	356,474	1,420,755	315,237	954,917	3,254,202	5,667,988	3,627,512	906,878	3,854,232	1,813,756
2031-32	23,775,742	809,057	22,966,685	6,890,006	500,000	361,476	1,440,691	319,660	968,316	3,299,863	5,741,671	3,674,670	918,667	3,904,337	1,837,335
2032-33	24,084,827	819,574	23,265,252	6,979,576	500,000	366,543	1,460,885	324,141	981,889	3,346,118	5,816,313	3,722,440	930,610	3,955,093	1,861,220
2033-34	24,397,929	830,229	23,567,701	7,070,310	500,000	371,676	1,481,342	328,680	995,639	3,392,974	5,891,925	3,770,832	942,708	4,006,509	1,885,416
2034-35	24,715,103	841,022	23,874,081	7,162,224	500,000	376,875	1,502,065	333,278	1,009,567	3,440,439	5,968,520	3,819,853	954,963	4,058,594	1,909,926
2035-36	25,036,399	851,955	24,184,444	7,255,333	500,000	382,142	1,523,057	337,936	1,023,676	3,488,522	6,046,111	3,869,511	967,378	4,111,355	1,934,756
2036-37	25,361,872	863,030	24,498,842	7,349,652	500,000	387,478	1,544,323	342,654	1,037,969	3,537,229	6,124,710	3,919,815	979,954	4,164,803	1,959,907
2037-38	25,691,576	874,250	24,817,327	7,445,198	500,000	392,883	1,565,864	347,434	1,052,448	3,586,570	6,204,332	3,970,772	992,693	4,218,946	1,985,386
2038-39	26,025,567	885,615	25,139,952	7,541,986	500,000	398,358	1,587,686	352,275	1,067,114	3,636,552	6,284,988	4,022,392	1,005,598	4,273,792	2,011,196
2039-40	26,363,899	897,128	25,466,771	7,640,031	500,000	403,904	1,609,791	357,180	1,081,972	3,687,184	6,366,693	4,074,683	1,018,671	4,329,351	2,037,342
2040-41	26,706,630	908,791	25,797,839	7,739,352	500,000	409,523	1,632,184	362,149	1,097,022	3,738,474	6,449,460	4,127,654	1,031,914	4,385,633	2,063,827
2041-42	27,053,816	920,605	26,133,211	7,839,963	500,000	415,214	1,654,868	367,182	1,112,269	3,790,430	6,533,303	4,181,314	1,045,328	4,442,646	2,090,657
2042-43	27,405,516	932,573	26,472,943	7,941,883	500,000	420,980	1,677,847	372,280	1,127,713	3,843,063	6,618,236	4,235,671	1,058,918	4,500,400	2,117,835
2043-44	27,761,787	944,696	26,817,091	8,045,127	500,000	426,820	1,701,124	377,445	1,143,358	3,896,379	6,704,273	4,290,735	1,072,684	4,558,905	2,145,367
2044-45	28,122,691	956,977	27,165,713	8,149,714	500,000	432,737	1,724,705	382,677	1,159,207	3,950,389	6,791,428	4,346,514	1,086,629	4,618,171	2,173,257
2045-46	28,488,286	969,418	27,518,868	8,255,660	500,000	438,730	1,748,591	387,977	1,175,262	4,005,101	6,879,717	4,403,019	1,100,755	4,678,207	2,201,509
2046-47	26,453,747	982,021	25,471,727	7,641,518	458,333	406,346	1,619,521	359,339	1,088,511	3,709,468	6,367,932	4,075,476	1,018,869	4,330,194	2,037,738
Total	721,136,196	24,813,364	696,322,832	208,896,850	15,000,000	10,966,598	43,724,656	9,694,024	29,384,415	100,127,157	174,080,708	111,411,653	27,852,913	118,374,881	55,705,827

Notes

1. Initial estimate is based on Auditor Controller's estimate of TDA revenues after applying a historical comparison of TDA revenues to SC METRO's transactions and use tax. As the RTC builds a history of actual transactions and use tax revenues it will be incorporated into future estimates. Adjustments will be made each year based on actual revenues.
2. A long-term growth of 1.3% is estimated based on the average historical growth of TDA revenues over the past 17 years, which have varied from -8.61% to 7.02%.
3. Implementation, management and administration costs are escalated by the assumed growth of the revenue of 1.3%.
4. The return to source variable is based on the existing transactions and use taxes for each of the cities and the library transactions and use tax to derive an estimate for the the unincorporated area . After the tax is collected and data is provided to the RTC by the Board of Equalization, adjustments can be made based on the actual transactions and use tax revenues generated by each jurisdiction.
5. Actual funds received and distributed and actual costs are shown in bolded italic text.
6. FY 2046-47 reduced to 11 revenue payments from the state since one payment was received in FY 2016-17.

Measure D: 5-Year Plan (FY18/19-FY22/23)

 Agency: **Community Bridges - Lift Line Measure D 5-Year Plan 18/19-22/23**

Project name	Description	Cost estimate 18/19	Cost estimate 19/20	Cost estimate 20/21	Cost estimate 21/22	Cost estimate 22/23	5-Year Measure D total	Total Cost	Other funds	Schedule (year)	
Driver 1 (see note below**)	Additional driver to provide expanded hours of paratransit service	\$ 115,000	\$ 119,025	\$ 123,191	\$ 127,503	\$ 131,965	\$ 616,684	Approx. \$125k/yr		Start 17/18	
Driver 2 (see note below**)	Additional driver to provide expanded hours of paratransit service	\$ 115,000	\$ 119,025	\$ 123,191	\$ 127,503	\$ 131,965	\$ 616,684	Approx. \$125k/yr		Start 17/18	
Driver Trainer	To support safety and service training for paratransit drivers	\$ 66,233	\$ 69,504	\$ 73,080	\$ 77,011	\$ 79,706	\$ 365,535	Approx. \$75k/yr		Start 17/18	
Admin. Assistant/Dispatcher	To support additional paratransit rides	\$ 57,377	\$ 60,373	\$ 63,661	\$ 67,274	\$ 69,628	\$ 318,313	Approx. \$65k/yr		Start 17/18	
Public Outreach	Materials and videos to promote paratransit ride availability	\$ 5,848	\$ 5,848	\$ 5,848	\$ 5,848	\$ 5,848	\$ 29,240	Approx. \$6k/yr		Ongoing	
Operations Facility - Pre-Construction	Facility project management architects, environ review, design	\$ -	\$ -	\$ 29,000	\$ 30,304	\$ 31,819	\$ 91,123	\$ 91,123	Grants, other, future Measure D	Start 2020	
Operational Facilities - Reserve	Reserve for projected purchase in 2025	\$ 376,698	\$ 362,381	\$ 318,185	\$ 300,714	\$ 285,224	\$ 1,643,202	\$ 5,863,838	Bank financing for 65% of purchase/ renov; capital campaign, grants, future Measure D	2025-2028	
Vehicle and Equipment Reserve	Two new paratransit vehicles / vehicle and equipment reserve (e.g. vehicle hoist)	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 150,000	\$30k/yr	Possibly 5310 grants or EPA California Air Resource Board	2018-2022	
	Total Measure D: FY2018/19-2022/23	\$ 766,156	\$ 766,156	\$ 766,156	\$ 766,156	\$ 766,156	\$ 3,830,780				

**Operating costs include driver support (Mechanic, IT Support, Fleet manager, Program Supervisor) salaries and fringes, vehicle operations such as vehicle maintenance and repair, fuel, vehicle Insurance, communications expenses, as well as taxes and licenses related to paratransit services. It also includes a prorated allocation of costs such as general liability insurance, staff training and other indirect costs.

Measure D: 5-Year Plan (FY18/19-FY22/23)

Project name:

Location:

Description:

Purpose/Need/Benefits:

Community Bridges - Lift Line Operations Facility	
To be determined	
Lift Line Administrative offices, maintenance facility, fleet parking	
<p>Purchase property and construct an operations facility that will house the entire CTSA Lift Line operations in one location. Funds could also be used for increases in facility leases to include relocating from our current location(s). Our maintenance facility in Watsonville is currently a month to month lease. If we had to relocate a new lease could more than double the current lease amount of \$3,600 per month. With five years of reserves and on the sixth year Lift Line plans on purchasing property to start the construction project of operations facility. We also plan on seeking additional funding for this project.</p> <p>New Facility to include the following but not limited to;</p> <ol style="list-style-type: none"> 1) Operational offices 2) Dispatch & Intake station 3) Driver holding area (extra board) and lockers. 4) Breakroom 5) Maintenance shop 6) Proper Vehicle Hoists (Large Bus & Mini Vans) 7) Fuel Station (time and money) 8) Wash Station 9) Shop Ventilation System 10) Hazardous Waste storage 	

Schedule

Total Cost by Phase

Measure D Funds

Fund - Capital Campaign/ Donations

Fund - Commercial Loan

Envir. Review	Design	Acquisition	Construction	Contingency/ Fees	Total
2025	2025	2025	2028	2028	
\$ 124,297	\$ 597,301	\$ 1,750,000	\$ 3,120,000	\$ 272,240	\$ 5,863,838
\$ 124,297	\$ 597,301	\$ 612,500	\$ 3,120,000		\$ 4,454,098
				\$ 272,240	\$ 272,240
		\$ 1,137,500			\$ 1,137,500

Other Info:

Personnel/Consultants:

Personnel	120,000
Legal	7,500
Bidding Expense	6,500

Pre-Development:

Architecture Design	554,101
Survey / Engineering	43,200
Permits, Inspections and Fees	16,524

Acquisition:

Land Costs	1,750,000
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Construction/Renovation:

Basic Construction / Renovation @ \$240 sq ft	3,120,000
Permits, Inspections and Fees	64,573
Equipment / Furnishings	75,000
Contingency / Utility Fees	106,440

Total Preliminary Cost **5,863,838**

Measure D: 5-Year Plan (FY18/19-FY22/23)

Project name:	Community Bridges - Lift Line Vehicle and Equipment Acquisition
Location:	N/A
Description:	Lift Line Paratransit Vehicles & Equipment
Purpose/Need/Benefits:	<p>Fund reserves that can be used for 2 new fleet vehicles that cannot be funded through 5310, replace ageing and or worn shop equipment, improvements and or upgrades to maintenance/operations facility. Provide 5310 match to leverage state funding.</p> <p>1) 24 passenger bus, the CTSA only has one 24 passenger bus. The bus is getting close to 200,000 miles and is not funded through 5310 due to no wheelchair lift.</p> <p>2) Electric vehicle, CTSA to experiment going green, alternative fuels, environmentally friendly vehicle program.</p> <p>3) 5310 vehicle match.</p> <p>4) Replace old and worn shop equipment such as vehicle hoist, rolling bridge jacks, tire mounting equipment. (Shop equipment is no longer funded through 5310).</p> <p>5) <i>Maintenance of current leased facility, with improvements such as install better lighting, new hot water heater, fix leaking roof, and make upgrades to building, bathrooms and offices.</i></p>

	24 Passenger	Electric Van	Vehicle Reserve		Total
Schedule (estimated)	2018-2019	2017-2018			
Total Cost by Phase	\$ 84,608	\$ 51,525	\$ 13,867		\$ 150,000
Measure D Funds	\$ 84,608	\$ 51,525			\$ 136,133
Matching Funds					
	Starcraft	Via Electric/ Nissan			

Other Info (e.g. map, photos, etc)

Measure D Update July 1, 2017 – December 31, 2017

Consolidated Transportation Services Agency - Community Bridges – Lift Line

Project Name	Description	Schedule Year & Estimated FY Cost	Project Status	Notes
Service Expansion: From 5 to 7 days per week	Driver 1: Additional driver to provide expanded hours of paratransit service	17/18 \$111,111	Complete Driver 1 Hired	Driver 1 fulling job duties, service has been expanded to 7days per week, additional rides being performed 715 to date about 38% goal of FY goal.
Service Expansion: From 5 to 7 days per week	Driver 2: Additional driver to provide expanded hours of paratransit service	17/18 \$111,111	Complete Driver 2 Hired	Driver 2 fulling job duties, service has been expanded to 7days per week, additional rides being performed 714 to date about 37% goal of FY goal.
Service Expansion: From 5 to 7 days per week	Driver Trainer: To support safety and service training for paratransit drivers	17/18 \$62,260	Complete Driver Trainer Hired	Trainer fulling job duties, providing training, additional support to drivers, and helping expansion efforts/needs.
Service Expansion: From 5 to 7 days per week	Admin. Assistant/Dispatcher: To support additional paratransit rides	17/18 \$53,804	Complete Admin Assistant Hired	Admin Asst. fulling job duties, additional support, scheduling, dispatching, office support, and public outreach. Please see Attachment A .
Public Outreach	Program publicity: Materials and videos to promote paratransit ride availability	17/18 \$5,848	Partially completed	At this point 40% of the funds spent on public outreach. An additional \$2,850 leveraged through the Community Foundation Santa Cruz. Attachment B
Capital Investment- Operations Facility	Operations Facility Acquisition: Purchase or lease a new operations facility that will house the entire Lift Line operation in one location. Reserve for projected purchase in 2025	2025 \$392,022	Scheduled for 2025	Funds placed in reserves for project purchase in 2025.
Capital Investment- Operational Facilities	Professional Services to Support Operations Facility Acquisition: Facility project management-architects, environ review, design	2020-21	Not Started	Project slated for 2020/2021
Capital Investment- Vehicle Equipment Reserve	Two new paratransit vehicles and equipment replacement (e.g. vehicle hoist)	17/18 \$30,000	Not completed	Plans for later in FY for this project

TO: Elderly and Disabled Transportation Advisory Committee

FROM: Grace Blakeslee, Transportation Planner

RE: Measure D: Regional Five-Year Programs of Projects

RECOMMENDATIONS

Staff recommends that the Elderly and Disabled Transportation Advisory Committee (E&D TAC):

1. Provide input on the "5-year Program of Projects" for the Measure D: Highway Corridors, Active Transportation and Rail Corridor investment categories and for the San Lorenzo Valley Highway 9 Corridor Improvements and the Highway 17 Wildlife Crossing.
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BACKGROUND

Measure D, the transportation ballot measure passed by more than a 2/3 majority of Santa Cruz County voters on November 8, 2016, provides funding for five categories of projects: neighborhood projects (30% of net measure revenues), highway corridors (25%), transportation for seniors and people with disabilities (20%), active transportation (17%), and the rail corridor (8%).

Each agency receiving Measure D revenue is required to annually develop, update, hold a public hearing on, and adopt a five-year program of projects. The five-year program of projects identifies how each agency plans to use Measure D funds in the upcoming 5 years. Agencies receiving direct formula allocations (cities, the County of Santa Cruz, Santa Cruz Metropolitan Transit District (METRO) and Community Bridges/Lift Line) are developing their five-year programs of projects, typically as part of their annual budget and/or capital improvement program development process. Community Bridges will provide their annual plan to the Elderly & Disabled Transportation Advisory Committee for their review and the RTC board for approval. The Regional Transportation Commission (RTC) is responsible for developing the five-year program of projects for regional projects, as described below.

DISCUSSION

The draft five-year plans for each of the regional transportation categories -- Highway Corridors, Active Transportation, and the Rail Corridor, as well as San Lorenzo Valley Highway 9 Corridor Improvements and the Highway 17 Wildlife

Crossing -- are prepared by the RTC and will be provided at the E&D TAC meeting. A summary of the Measure D regional programs is included as Attachment 1.

These five-year plans cover FY18/19 through FY23/24. These plans are adjusted annually based on updated project schedule and cost information, as well as information on any grants and other funds agencies are able to secure for the projects. Since annual revenues are sometimes insufficient for larger projects, agencies sometimes need to carry over, reserve, or "bank" revenues to future years.

After a presentation from RTC staff regarding these projects, RTC staff recommends that the Elderly and Disabled Transportation Advisory Committee provide input on the "5-year Program of Projects" for the Measure D: Highway Corridors, Active Transportation and Rail Corridor investment categories and for the San Lorenzo Valley Highway 9 Corridor Improvements and the Highway 17 Wildlife Crossing.

Next Steps

The RTC board is scheduled to review the Measure D five-year plans at the May 3, RTC meeting and consider these lists following a public hearing at its June 7, 2018 meeting.

While "pay-as-you-go" financing is the preferred method of financing Measure D projects, the RTC may determine bonding or other financing is cost-effective to accelerate regional project implementation. Use of bonding or short term loans will depend on project delivery schedules, funding needs, matching fund opportunities, and cash flow estimates. Direct recipients may not bond against Measure D revenues, but could access options such as cooperative fund agreements among agencies receiving Measure D funds, or other means to advance funding for ready projects. While the RTC is investigating options to advance delivery of storm damage repairs on county roads, projects on the Highway 1 corridor, the Highway 17 Wildlife Crossing, and other projects in the 5-year programs of projects do not currently propose any special financing.

SUMMARY

Measure D requires recipient agencies to annually prepare and update a five-year program of projects, identifying how agencies plan to spend Measure D funds. Staff is seeking input from RTC committees on the draft five-year program of projects for regional investment categories.

Attachment 1

Measure D- Regional Programs

Trail Program

17% of net Measure D revenues are designated for the "Active Transportation" category to fund the Monterey Bay Sanctuary Scenic Trail Network (MBSST), also known as the Coastal Rail Trail. As noted in the Expenditure Plan, this funding will be used for bicycle and pedestrian trail construction; maintenance, management and drainage for the rail and trail corridor; and possible installation of conduit for internet and electrical services.

Work tasks related to trail project implementation and program management include design, preliminary engineering, environmental permitting, as well as public outreach for projects currently under way and for development of the network as a whole. Specific tasks include coordination with local public works departments, stakeholders, State Parks, rail operators, California Public Utilities Commission, Environmental Health Services, consultants and technical experts; right-of-way surveying, encroachments and property rights certifications; grant applications for future projects and complete funding for current projects; studies related to trail implementation or corridor uses; management of all funding sources and contracts; partnership building; presentations to community organizations; event planning and participation. This Measure D allocation category also includes general rail right-of-way corridor encroachments & maintenance. Items such as vegetation abatement; tree, trash and graffiti removal; drainage issues; storm damage repairs, etc.

Highway Corridors

25% of net Measure D revenues are designated for the Highway Corridors category, which includes Highway 1 auxiliary lanes, bicycle and pedestrian over-crossings, traveler information and transportation demand management (TDM) programs, highway safety and congestion reduction programs. The RTC will also be seeking state and federal grant funds to supplement Measure D revenues allocated to these projects.

San Lorenzo Valley (SLV) Highway 9 Corridor Improvements

Measure D includes a total of \$10 million for transportation projects along the Highway 9 corridor through San Lorenzo Valley (approximately \$333,000 per year over 30 years). The RTC is working with a consultant team, Caltrans, County Public Works and Planning, Santa Cruz Metropolitan Transit District (METRO), and the public to develop a comprehensive plan for the Highway 9 corridor. The corridor plan will identify, evaluate and prioritize multimodal investments along the corridor.

Highway 17 Wildlife Crossing

Measure D includes a total of \$5 million for the Highway 17 Wildlife Crossing (approximately \$167,000 per year over 30 years). Caltrans and the Land Trust secured over \$3 million in State Highway Operation and Protection Program (SHOPP) funds from the California Transportation Commission (CTC) to initiate environmental review and design of a wildlife crossing on Highway 17 near Laurel Curve. Measure D revenues will not be able to fully fund the project by 2020. RTC staff is working with the Land Trust and Caltrans to investigate financing and other funding options.

Rail Corridor

8% of net Measure D revenues are designated for the Rail Corridor category for infrastructure preservation and analysis (including environmental and economic analysis) to answer community questions about possible future transit and other transportation uses of the rail corridor.

As stated in the Measure D Expenditure Plan, projects under this category include “maintaining and repairing the publicly-owned Santa Cruz Branch Rail Line.” Therefore, the 5-year program of projects includes storm damage repair and clean up, bridge analysis and rehabilitation to continue work began in 2012, drainage repair and improvements, and track maintenance and repairs. Measure D does not include funding for any new train or rail service.