

General Compliance Reporting:

Confirm completion of the following Measure D Agreement requirements during the reporting year. The RTC shall utilize information from Recipient on expenditures to prepare a comprehensive report to the public on the expenditure of Measure D revenues.

Recipient - Update all highlighted fields on 3 tabs. Reporting Requirements (Articles from the Master Fund Agreement are referenced as comments)

REPORTING YEAR: **FY18/19**

Recipient Agency **Santa Cruz Metropolitan Transit District**

Public Information/ Outreach	Date	Documentation (ex. copy of resolution, minutes, notices, articles, webpage, signage, etc.) - please attach.	Comments, additional info. If applicable, briefly explain why publicity requirement was not completed
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Date Initial 5-Year Plan Adopted	6/23/2017	Resolution	part of overall annual budget adoption
Date of 5-Year Plan Public Hearing	6/28/2018	Staff report	part of overall annual budget adoption
Date of annual audit of Measure D Expenditures	12/31/2019	audit	attached
News Article	6/12/2019	Public Hearing Notice	Notice of public hearing held on 6/28/2019 for the adoption of FY20 and FY21 budget, including Measure D funds.
Website with info on Meas. D projects	ongoing	Annual budget details use of Measure D funds	https://www.scmttd.com/images/department/finance/financials/finaloperatingbudgetfy18fy19.pdf
Map of Measure D-funded Projects	NA		Projects and drivers funded by Measure D cover entire service area
Photos (before/after)	ongoing	Document with photos, captions	Attached stickers are on buses and paratransit vehicles
Signage	ongoing	Stickers have been placed on buses and vans	
Describe any other public outreach conducted during the reporting year about Measure D	Measure D budget outreach was conducted as part of the annual budget public comment period, concluding with a public hearing on 6/28/18.		

Maintenance of Effort

FY18/19 LOCAL funds spent on multimodal local road repairs & maintenance (excludes formula state & fed funds, special grants)	\$ 37,842,339	Locally-generated funds
Maintenance of Effort BASELINE (should match MOE report submitted to RTC in 2017)	\$ 45,648,421	Pre-Measure D Baseline of average of locally-generated revenues and expenditures for transportation purposes in the three fiscal years prior to the start of Measure D allocations to recipient agencies (FY16/17, FY15/16, FY14/15).
FY19/20 LOCAL (exclude HUTA, formula state & fed funds) funds BUDGETED on multimodal local road repairs & maintenance	\$ 39,635,002	Locally-generated funds beyond HUTA or Measure D (ex. general funds, city tax, developer fees, etc.)
If FY17/18 local expenditures were lower than the baseline amount, explain why. (e.g. emergencies, extraordinary event - fires, etc.) Recipient agencies have up to three fiscal years to meet the adjusted minimum local revenue expenditure requirement.		
Does your agency have an indirect cost allocation plan?	No	If "no", Measure D funds cannot be used for indirect costs.
Cities/County Only: Does your agency have an adopted Complete Streets policy?	NA	

Contacts

Administrative officer or designated staff available to report on or answer any and all inquiries in regard to Recipient's receipt, usage, and/or compliance audit findings regarding Measure D funds before the RTC and/or the Independent Oversight Committee or RTC advisory committees, as applicable.

Name	Title/Measure D tasks	Phone/email
Jayne Ackerman	Projects	jackerman@scmttd.com
Debbie Kinslow	Revenue/Expenditures	dkinslow@scmttd.com

MEASURE D EXPENDITURE REPORT

Agency	FY 16/17-17/18 Measure D Received <i>(4/1/17-6/30/18)</i>	Beginning of Year Fund Balance <i>(per METRO audit)</i>	FY 18/19 Measure D Received <i>(7/1/18-6/30/19)</i>	Interest Earned on Measure D funds FY16/17- FY18/19	Measure D Expended <i>(7/1/18-6/30/19)</i>	End of Year Fund Balance/ Carryover to be Spent in Future Years
Santa Cruz Metropolitan Transit District	\$ 3,358,782.01	\$ 1,560,667.00	\$ 3,399,796.21	\$ 80,686.01	\$ 2,099,051.00	\$ 2,953,657.00

DETAILED SUMMARY OF EXPENDITURES AND ACCOMPLISHMENTS.						<i>(expenditures -FY16/17-18/19)</i>				
#	Project Name	Total Project Cost	Past year(s) Measure D Expenditures on this project	FY18/19 Measure D Expenditures	(Est) Future Year(s) Measure D Expenditures	<i>Measure D- funded Capital Costs</i>	<i>Measure D- funded Non-capital (non- infrastructure, outreach, admin, etc)</i>	<i>Measure D- funded indirect costs</i>	Leveraged Funds <i>(grants & other funds secured, which used Meas. D as match)</i>	Leveraged Fund Source Name(s)
1	Fixed route - 9 operators (average cost of Operator with benefits plus cost of mileage driven in year)	\$ 88,083,168	\$ 1,695,024	\$ 1,294,128	\$ 1,235,871	<i>see below</i>	\$ 2,989,152	N/A	\$ -	See MOE for all other Local Funds received
1	Sustaining of Paracruz service levels - 1 operator minus farebox recovery	\$ 7,705,682	\$ 105,203	\$ 74,848	\$ 76,387	<i>see below</i>	\$ 180,051	N/A	\$ -	See MOE for all other Local Funds received
2	Capital - new and replacement vehicles- can be used for equipment	\$25M	\$ -	\$ 730,075	\$ 2,046,031	\$ 532,332	<i>see above</i>	\$ -	\$ 18,485,675	FTA 5339(a), PTMISEA, STIP, LCTOP, LPP, STA-SGR
				\$ 2,099,051						

Agency

Santa Cruz Metropolitan Transit District

TAILED SUMMARY OF EXPENDITURES AND		Consistency with 5-year plan		Project Information Continued		
Project Name	Project in approved 5-year plan?	If not in 5-year plan or different amount or scope, why different?	Location/Limits	Description <i>(may include additional project components, ex. complete streets, traffic calming, crossing improvements, drainage upgrades, etc.)</i>	Project Category <i>(Drop-down Menu)</i>	Primary Project Type <i>(Drop-down Menu)</i>
Fixed route - 9 operators (average cost of Operator with benefits plus cost of mileage driven in year)	Yes	N/A	N/A	Fixed Route-frequency, span of service - Routes 35, 40, 41, 68, 69A, 71, 72, 75, 79, 91X, Route 71 weekend-17 addtl. trips to provide 30 minute frequency in/outbound for 8 hrs during the days	Public Transit	Staffing
Sustaining of Paracruz service levels - 1 operator minus farebox recovery	Yes	N/A	N/A	Paracruz - sustain service levels	Public Transit	Staffing
Capital - new and replacement vehicles- can be used for equipment	Yes	N/A	N/A	Capital - Vehicles new and replacements	Public Transit	Equipment and New Vehicles

Measure D Transportation for Seniors and People with Disabilities Program

Performance Measures

AGENCY: **Santa Cruz Metropolitan Transit District**

Direct Allocation recipients are to document the performance and benefits of the projects and programs funded with Measure D funds. The following performance measures are a selection of performance standards to

Submittal date: **12/31/2019**

Performance Measure	Performance Metric and Standard	Fixed Route - FY16/17 (Baseline)	Fixed Route Current Numbers - FY18/19	Corrective Action (If applicable)	Paratransit Baseline - FY16/17	Paratransit Current Numbers - FY18/19	Corrective Action (If applicable)
Ridership/Service Utilization	Change in annual ridership and passenger trips per revenue vehicle hour and mile and qualitative explanation for possible reasons.			<i>Provide information on why numbers went down</i>			<i>Provide information on why numbers went down</i>
▪ Annual Ridership		5,091,394	5,045,972	0.89% decrease. During this time-frame nation-wide bus ridership decreased 1.26%	75,116	73,497	Decrease of 2.16% as a result of the discontinuation of Demand-Response Taxi Service. Increase of 1.84% from last audit.
▪ Passenger trips per revenue vehicle service hour (Pax/VRH)		24.38	24.34	0.16% decrease due to 0.89% annual ridership decrease. Previously reported Pax/VRH decrease was 0.29%.	1.90	1.64	Decrease of 13.68%. VRH increased 15.54% due to increased congestions, while ridership decreased 2.16%
▪ Passenger trips per revenue vehicle service miles (Pax/VRM)		1.76	1.76	N/A	0.16	0.16	N/A
Cost Effectiveness	Maintain operating cost per passenger, per revenue vehicle hour, per revenue mile, or trip; percentage increase less than or equal to inflation as measured by CPI			<i>Any agency with significant increase in costs must provide an explanation</i>			<i>Any agency with significant increase in costs must provide an explanation</i>
▪ Operating Cost per Passenger (\$/Pax)		\$7.90	\$8.71	Operating cost per passenger increased 10.25%. FY17 to FY19: CPI increased 7.24%. <u>Operating costs increased while ridership decreased.</u>	\$65.29	\$70.08	Operating cost increased 7.34%. FY17 to FY19: CPI increased 7.24%.
▪ Operating Cost per Revenue Vehicle Hour (\$/VRH)		\$192.56	\$212.00	Operating cost per hour increased 10.10%. FY17 to FY19: CPI increased 7.24%. <u>Operating costs increased while VRH was stable.</u>	\$124.25	\$114.96	Operating cost per hour decreased 7.48%. FY17 to FY19: CPI increased 7.24%. <u>This was not an increase.</u>
▪ Operating Cost per Revenue Vehicle Mile (\$/VRM)		\$13.89	\$15.32	Fixed Route operating cost per mile increased 10.30%, FY17 to FY19: CPI increased 7.24%. <u>Peak service occurs during peak traffic congestion. Leads to greater costs per mile.</u>	\$10.75	\$11.08	Paracruz operating cost per mile increased 3.07%. FY17 to FY19: CPI increased 7.24%. <u>This was not a significant increase.</u>
Cost per Trip (\$/Trip)		\$226.16	\$249.43	Fixed Route operating cost per trip increased 10.29%. FY17 to FY19: CPI increased 7.24%. <u>Operating costs increased while ridership decreased.</u>	N/A	N/A	N/A

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State of Good Repair				<i>Provide information on plan to keep bus and paratransit vehicles in state of good repair.</i>			<i>Provide information on plan to keep bus and paratransit vehicles in state of good repair.</i>
▪ Average age of bus and paratransit vehicles	Reduce average age of fleet/number of vehicles beyond useful life	12.46	13.51	Transit Asset Management Performance Measure Targets, submitted to NTD in RY19 Report Package.	7.25	5.5	Transit Asset Management Performance Measure Targets, submitted to NTD in RY19 Report Package.
▪ Number of vehicles beyond useful life		49	30	Transit Asset Management Performance Measure Targets, submitted to NTD in RY19 Report Package.	33	15	Transit Asset Management Performance Measure Targets, submitted to NTD in RY19 Report Package.
Service Provision				<i>Any agency not meeting expected performance must provide an explanation and a description of how service provision will be met in the future.</i>			<i>Any agency not meeting expected performance must provide an explanation and a description of how service provision will be met in the future.</i>
▪ Service hours/span	Maintain or increase service span - goal is 7 days/week, 20 hours per day	Weekday (5 days) : 21.08 hours	Weekday (5 days): 21.08 hours	N/A	Weekday (5 days): 21.08 hours	Weekday (5 days): 21.08 hours	N/A
		Weekend (2 days) : 18.67 hours	Weekend (2 days): 18.67 hours		Weekend (2 days): 18.67 hours	Weekend (2 days): 18.67 hours	
▪ Frequency on major corridors or trunk lines	Maintain or increase frequencies, revenue hours, miles, routes, and service areas.	0.25	0.25	UCSC	N/A	N/A	There is no scheduled frequency on paratransit service as it is on-demand service.
		0.50	0.50	Cabrillo/South County			
		0.50	0.50	Scotts Valley/San Lorenzo Valley			
▪ Revenue hours		208,797	207,348	Revenue hours were reduced in FY18 due to service cut in September of FY16/17.	39,474	44,804	Revenue hours were reduced in FY17, due to discontinuation of Demand Response-Taxi Service in April 2017. Revenue hours of Demand-Response returned to previous levels.
▪ Revenue miles		2,895,295	2,868,513	Revenue miles were reduced in FY18 due to service cut in September of FY16/17.	456,208	464,816	Revenue miles were reduced in FY18 due to discontinuation of Demand Response-Taxi Service in April 2017.
▪ Service areas		UZA 204 (Santa Cruz) UZA 378 (Watsonville)	UZA 204 (Santa Cruz) UZA 378 (Watsonville)	N/A	UZA 204 (Santa Cruz) UZA 378 (Watsonville) 0-CA (Non-UZA within Santa Cruz County)	UZA 204 (Santa Cruz) UZA 378 (Watsonville) 0-CA (Non-UZA within Santa Cruz County)	N/A
▪ Number of routes		26	24	Route 33/34 were eliminated due to consistently low ridership. Trips were monitored for 2 years before elimination.	N/A	N/A	Paratransit service is on demand and operates within 0.75 miles of any operating bus route.

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Service Operations and Provisions	Track number of seniors or people with disabilities served by program. Service types: ADA mandated paratransit, door-to-door service, taxi programs, accessible van service, shuttle service, group trips, travel training, meal delivery, and fixed-route transit			<i>Report on ridership or service data. Explain reasons for ridership reductions.</i>			<i>Report on ridership or service data. Explain reasons for ridership reductions.</i>
Number of people served or trips provided to seniors or people with disabilities		659,799	636,533	Discounted Ridership decreased 3.53%. <u>Fixed Route ridership declined 0.84% following the 13% service cut in September of FY16/17.</u>	75,116	73,497	Demand Response-Taxi Service was discontinued in April FY17. Paratransit ridership decreased 3.90% in previous audit and only 2.16 this audit.
Percent of fixed route service used by seniors and people with disabilities		12.96%	12.61%	N/A	100.00%	100.00%	N/A
METRO: Budget Apportionment	Maintain paratransit operating budget and service.			<i>If other funds shifted from one program to another, provide explanation</i>			<i>If other funds shifted from one program to another, provide explanation</i>
Paratransit and Fixed Route % of Total Operating Expenses		89.12%	89.51%	N/A	10.87%	10.49%	N/A
Leveraged Funds	Report total grants and other funding secured using Measure D revenues as a match.			<i>Explain if Measure D funds fully funding projects.</i>			<i>Explain if Measure D funds fully funding projects.</i>
		N/A	\$18,485,675	N/A	N/A	\$642,038	N/A
Total Measure D Leveraged Funds divided by total passengers during period.		N/A	\$3.66	N/A	N/A	\$8.89	N/A