



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

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**AGENDA**

**1:30pm - 3:30pm**

**Tuesday, April 13, 2021**

**NOTE: TELECONFERENCE**

**Join the online meeting to see presentations:**

<https://us02web.zoom.us/j/86455931089>

**Online meeting ID: 864 5593 1089**

**Dial-in number (US): +1 669 900 9128**

**Members of the public may not attend this meeting in person.** Comments and questions may be shared with the Committee through teleconference audio in real time, or by prior written submission to [amarino@sccrtc.org](mailto:amarino@sccrtc.org).

This meeting is being held by teleconference in accordance with the Brown Act as currently in effect under the State Emergency Services Act, the Governor's Emergency Declaration related to COVID-19, and the Governor's Executive Order N-29-20, which allow local board and committee members and the public to participate and conduct meetings by teleconference, videoconference, or both. [View full executive order.](#)

- 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 February 9, 2021— pg. 5**
- 6. Receive RTC Meeting Highlights— pg. 11**
- 7. Receive Information Items— pg. 15**
  - a. Santa Cruz METRO Announces Free Fares County-Wide for COVID-19 Vaccination Appointments**
  - b. Walk S.F Wants Your Help on Three Key Safety Bills**

### **REGULAR AGENDA**

- 8. FY 2021-22 Transportation Development Act Funds for Community Bridges— pg. 21**
- 9. FY 2021-22 Transportation Development Act Funds for Volunteer Center— pg. 50**
- 10. FY 2021-22 Transportation Development Act Funds for the Santa Cruz Metropolitan Transit District— pg. 65**
- 11. Measure D: Community Bridges/Lift Line Five-Year Plan— pg. 90**
- 12. Final Draft 2021 Unmet Paratransit Needs List— pg. 95**
- 13. Oral update on Draft Business Plan for Electric Passenger Rail on the Santa Cruz Branch Rail Line— pg. 107**
- 14. Elect Committee Chair and Vice Chair— pg. 108**
- 15. AMBAG 2021 Title VI Plan Development Process— pg. 109**
- 16. Receive Program Updates— pg. 113**
  - a. Volunteer Center
  - b. Community Bridges
  - c. Santa Cruz Metro
  - d. SCCRTC
  - e. Pedestrian Ad-hoc Subcommittee



## **17. 3:30 pm — Adjourn**

**Next meeting: 1:30 pm, Tuesday, June 8<sup>th</sup>, 2021 via teleconference**

### **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](mailto:info@sccrtc.org) / website: [www.sccrtc.org](http://www.sccrtc.org)*

### **ACCOMMODATIONS FOR PEOPLE WITH DISABILITIES**

*The Santa Cruz County Regional Transportation Commission does not discriminate on the basis of disability and no person shall, by reason of a disability, be denied the benefits of its services, programs, or activities. This meeting location is an accessible facility. If you wish to attend this meeting and require special assistance in order to participate, please contact RTC staff at 460-3200 (CRS 800/735-2929) at least three working days in advance of this meeting to make arrangements. People with disabilities may request a copy of the agenda in an alternative format. As a courtesy to those person affected, please attend the meeting smoke and scent-free.*

### **SERVICIOS DE TRADUCCIÓN/TRANSLATION SERVICES**

*Si gusta estar presente o participar en esta junta de la Comisión Regional de Transporte del condado de Santa Cruz y necesita información o servicios de traducción al español por favor llame por lo menos con tres días laborables de anticipo al (831) 460-3200 para hacer los arreglos necesarios. (Spanish language translation is available on an as needed basis. Please make advance arrangements (at least three days in advance by calling (831) 460-3200.*

### **TITLE VI NOTICE**

*The RTC operates its programs and services without regard to race, color and national origin in accordance with Title VI of the Civil Rights Act. Any person believing to have been aggrieved by the RTC under Title VI may file a complaint with RTC by contacting the RTC at (831) 460-3212 or 1523 Pacific Avenue, Santa Cruz, CA, 95060 or online at [www.sccrtc.org](http://www.sccrtc.org). A complaint may also be filed directly with the Federal Transit Administration*



*to the Office of Civil Rights, Attention: Title VI Program Coordinator, East Building, 5th Floor-TCR, 1200 New Jersey Ave., SE, Washington, DC 20590.*

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

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**DRAFT MINUTES**  
**1:30pm - 3:30pm**  
**Tuesday, February 9, 2021**

**NOTE: TELECONFERENCE**

Members of the public may not attend this meeting in person. Comments and questions may be shared with the Committee through teleconference audio in real time, or by prior written submission to [amarino@sccrtc.org](mailto:amarino@sccrtc.org).

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1. Roll call

The meeting was called to order at 1:37 p.m.

**Members present:**

Kirk Ance, CTSA (Lift Line)  
Deborah Benham, 5th District  
Janet Edwards, 1st District  
Patty Talbot, Social Services Provider – Seniors  
Lisa Berkowitz, CTSA (Community Bridges)  
Veronica Elsea, 3<sup>rd</sup> District  
Tara Ireland, Social Service Provider – Persons of Limited Means  
Caroline Lamb, Potential Transit User (Disabled)  
Michael Pisano, Potential Transit User (60+)

**Unexcused absences:**

Martha Rubbo, 4<sup>th</sup> District  
Alex Weske, Social Service Provider – Disabled  
Paul Elerick, 2<sup>nd</sup> District  
Clay Kempf

**RTC staff present:**

Amanda Marino, Transportation Planner  
Luis Mendez, Deputy Director  
Amy Naranjo, Transportation Planner



Grace Blakeslee, Senior Transportation Planner  
Rachel Moriconi, Senior Transportation Planner

***Others present:***

Pete Rasmussen, Santa Cruz METRO  
Eileen Wagley, Santa Cruz METRO  
Rick Chace  
Ray Cancino, Community Bridges  
Douglas Underhill, Community Bridges  
Nathan Nguyen, City of Santa Cruz  
Dan Estranero, City of Santa Cruz

2. Introductions
3. Oral communications
4. Additions or deletions to consent and regular agendas

*Move Item 12. Pedestrian Hazard Report to Item 13e. Pedestrian Ad-hoc Subcommittee Program Items.*

*The Committee decided to add Item 16a. Public Outreach for COVID Vaccine Transportation Services to the regular agenda as an urgency item.*

**CONSENT AGENDA**

5. Approved minutes from November 17, 2020

*A motion (Berkowitz/Edwards) was made to approve the minutes. The motion passed unanimously, with members Kirk Ance, Deborah Benham, Janet Edwards, Patty Talbot, Lisa Berkowitz, Veronica Elsea, Tara Ireland, Caroline Lamb, Michael Pisano and voting in favor.*

6. Received RTC Meeting Highlights
7. Receive Transportation Development Act Revenues Report
8. Receive 2021 E&D TAC Meeting Schedule
9. Receive FY 21-22 TDA Claims Calendar
10. Received Information Items
  - a. Draft 2021 Long Range Development Plan and Draft Environmental Impact Report Announcement
  - b. "A Serious Injury Changed Cyclist Ian Mackay's Life. Trails Helped Him Rebuild It"



- c. UC Davis Development of an Innovation Corridor Testbed for Shared, Electric, Connected, and Automated Transportation Webinar

11. Committee Chair and Vice Chair Election Notice

12. Received Pedestrian Hazard Report – this item was moved to the regular agenda as Item 13e.

*A motion (Edwards/ Pisano) was made to approve the consent agenda. The motion passed unanimously, with members Kirk Ance, Deborah Benham, Janet Edwards, Patty Talbot, Lisa Berkowitz, Veronica Elsea, Tara Ireland, Caroline Lamb, Michael Pisano and voting in favor.*

### **REGULAR AGENDA**

13. Received Program Updates

- a. Volunteer Center – FY 20-21 Report

Committee member Tara Ireland communicated the impacts of COVID-19 on the Volunteer Center's transportation services and provided updates on the Grocery Shopper Program. The committee was also informed of the Volunteer Center's new "Stay Connected Program". This program is a remote connectivity program for local seniors designed to be an ongoing person-to-person engagement over the phone. More information can be found by visiting:

<https://scvolunteercenter.org/programs/stay-connected/>

- b. Community Bridges

Committee member Kirk Ance, Ray Cancino, and Douglas Underhill communicated the impacts of COVID-19 on Community Bridge's transportation services and the current status of Lift Line's new essential services programs.

- c. Santa Cruz Metro

- d. SCCRTC

Amanda Marino, Transportation Planner, communicated the status of the SCCRTC serving as the Access Fund Administrator for the TNC (Transportation Network Companies) Access for All Program created by the California Public Utilities Commission and announced the release of the Caltrans District 5 Draft Active Transportation Plan. The plan is available for comment on the District 5 website through March 9, 2021. For more



information please visit: [www.catplan.org](http://www.catplan.org)

e. Pedestrian Ad-hoc Subcommittee, Received Pedestrian Hazard Report

Committee members Veronica Elsea, Deborah Benham, and Janet Edwards provided an update and discussed next steps on the Safe Pedestrian Intersection Design Project and will be reviewing the Pedestrian Hazard Report process.

*No action taken.*

14. Preliminary Draft 2021 Unmet Needs

Chair Veronica Elsea and Amanda Marino, Transportation Planner, provided a background and importance of identifying Unmet Transit and Paratransit Needs. The Unmet Needs List is used to support recommendations for funding prioritization, and to provide input to service providers. The committee provided input on the 2021 Preliminary Draft Unmet Needs List.

*No action taken.*

15. E&D TAC Appointment Recommendations

Amanda Marino, Transportation Planner, introduced the four appointment applications received for the Elderly & Disabled Transportation Advisory Committee.

*A motion (Lamb/Edwards) was made to recommend that the RTC appointment new members and member alternate positions to fill vacancies on the E&D TAC. The motion passed unanimously, with members Kirk Ance, Deborah Benham, Janet Edwards, Patty Talbot, Lisa Berkowitz, Veronica Elsea, Tara Ireland, Caroline Lamb, Michael Pisano and voting in favor.*

16. Pedestrian Projects Ad-hoc Subcommittee Liaison Appointment

Chair Veronica Elsea communicated the roles and responsibilities to serve as a liaison to increase awareness of capital projects and communication with local jurisdictions. Five members of the committee volunteered to serve as liaisons for the following jurisdictions: Santa Cruz County, City of Santa Cruz, Capitola, Scotts Valley, Watsonville, and Caltrans.

*A motion (Lamb/Edwards) was made for approval to create liaison positions in order to increase awareness of capital projects and communication with local jurisdictions. The motion passed unanimously, with members Kirk Ance,*



*Deborah Benham, Janet Edwards, Patty Talbot, Lisa Berkowitz, Veronica Elsea, Tara Ireland, Caroline Lamb, Michael Pisano and voting in favor.*

16a. Public Outreach for COVID Vaccine Transportation Services

Chair Veronica Elsea communicated the need for public outreach to notify the community of existing transportation services to COVID vaccination centers. Committee Members discussed potential opportunities and funding to perform outreach efforts.

*No action taken.*

17. City of Santa Cruz Article 8 Transportation Development Act Allocation Request

Dan Estranero and Nathan Nguyen representing the City of Santa Cruz presented an overview of the Pacific Avenue Sidewalk Project. Committee Members discussed the need for handicap parking and wheelchair accommodations in the project area. The committee requests that the City of Santa Cruz will keep the RTC and E&D TAC apprised of their efforts to address the concerns of the lack of handicap parking and access.

*No action taken due to a loss of quorum.*

18. Draft Constrained Project List and Financial Element for 2045 Regional Transportation Plan

Amy Naranjo, Transportation Planner presented an overview the draft constrained project list and draft funding forecasts for inclusion in the 2045 Santa Cruz County Regional Transportation Plan (RTP) and Metropolitan Transportation Plan (MTP), and for evaluation in the program-level Environmental Impact Report (EIR). The committee was asked to email comments by Tuesday, February 16, 2021 to [2045rtp@sccrtc.org](mailto:2045rtp@sccrtc.org).

*No action taken.*

19. FY 20/21 Low Carbon Transit Operations Program (LCTOP)

Amanda Marino, Transportation Planner and Rachel Moriconi, Senior Transportation Planner communicated that RTC staff recommend that the RTC program 85.5% of RTC shares of FY 20/21 Low Carbon Transit Operations Program (LCTOP) and 100% of Santa Cruz METRO formula shares go to METRO for its Zero-Emission Watsonville Circulator Operating Project. Staff recommended that 14.5% of RTC shares go to Lift Line for Electric Vehicle (EV) chargers. Additionally, the E&D TAC is encouraged to identify any additional priority transit projects which could reduce greenhouse gas emissions and vehicle miles traveled for consideration in



future years through the 2021 Unmet Needs process.  
*No action taken.*

Meeting adjourned at approximately 4:09 pm.

The next E&D TAC meeting is scheduled for Tuesday, April 13<sup>th</sup>, 2021 at 1:30 p.m. at the RTC Office, Santa Cruz. NOTE: Teleconference may be necessary due to COVID-19.

Respectfully submitted, Amanda Marino, Staff





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*CONTACTS: Shannon Munz, Communications Specialist ([smunz@sccrtc.org](mailto:smunz@sccrtc.org))  
Guy Preston, Executive Director  
Luis Pavel Mendez, Deputy Director*

## **Santa Cruz County Regional Transportation Commission (RTC) March 4, 2021 Meeting Highlights**

### **Financially Constrained Project List for 2045 Transportation Plans**

The Regional Transportation Commission (RTC) approved the project list, identifying financially constrained projects for inclusion in the 2045 Santa Cruz County Regional Transportation Plan, Association of Monterey Bay Area Governments (AMBAG) Metropolitan Transportation Plan - Sustainable Communities Strategy (MTP-SCS) and evaluation in the program-level Environmental Impact Report (EIR). The RTP and MTP-SCS include goals, targets and policies that are used to prioritize projects for funding (Policy Element); identify the area's transportation needs (Action Element); and estimate the amount of state, federal and local funds that is reasonably expected to be available (Financial Element).

### **Federal and State Legislative Updates**

Through its Legislative Program, the RTC monitors and provides input to state and federal agencies and representatives on legislative and administrative actions that could impact transportation funding or implementation of the Regional Transportation Plan (RTP), Measure D, Transportation Improvement Programs (TIP), and transportation projects in Santa Cruz County. The Regional Transportation Commission (RTC) received an update on state and federal legislative activities that could impact local transportation projects and programs.

### **Upcoming RTC and Committee Meetings**

Due to precautions associated with COVID-19 (coronavirus), **all RTC and committee meetings will be held by teleconference only until further notice.** Please check the RTC website [<https://sccrtc.org/meetings/calendar/>] or call 460-3200 to confirm meeting and teleconference information. Agendas are posted to the website at least 3 days before the meeting. Meetings may be canceled if there are no action items to be considered by the committee.

The RTC is committed to its compliance with the Americans with Disabilities Act (ADA) during this time of national emergency. Please contact the RTC at least 3 days in advance of a meeting if special accommodations are needed. If any document, webpage, meeting, or recording is inaccessible to you, kindly notify us at [info@sccrtc.org](mailto:info@sccrtc.org) or by calling 831-460-3200.

### **Regional Transportation Commission Meeting**

Thursday, April 1, 2021, 9:00 a.m.



**Measure D Taxpayer Oversight Committee Meeting**

Tuesday, March 9, 2021, 6:00 p.m.

Tuesday, March 16, 2021, 6:00 p.m.

**Budget, Administration & Personnel Committee Meeting**

Thursday, March 11, 2021, 3:00 p.m.

**Bicycle Advisory Committee Special Meeting**

Monday, April 12, 2021, 6:00 p.m.

**Elderly & Disabled Transportation Advisory Committee**

Tuesday, April 13, 2021, 1:30 p.m.

**Interagency Technical Advisory Committee**

Thursday, March 18, 2021, 1:30 p.m.

*Public input on transportation issues is welcomed and encouraged. For more information, visit the SCCRTC website at [www.sccrtc.org](http://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](http://www.communitytv.org) or call 831-425-8848 for schedule and station information.*





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Guy Preston, Executive Director  
Luis Pavel Mendez, Deputy Director*

## **Santa Cruz County Regional Transportation Commission (RTC) April 1, 2021 Meeting Highlights**

### **Consideration of Request to Remove District 1 Bicycle Advisory Committee Members**

The Regional Transportation Commission (RTC) approved Commissioner Manu Koenig's request to remove the current District 1 representatives to the Bicycle Advisory Committee. As the new District 1 County Supervisor, Commissioner Koenig wishes to nominate new primary and alternate members to the Bike Committee representing District 1 for RTC consideration. Staff will begin the process of filling the vacancies by starting an open recruitment for new representatives for District 1.

The Commission also directed staff to work with the Budget, Administration and Personnel Committee to consider potential changes to the RTC's Committee Bylaws that would allow appointments by individual Commissioners.

### **Transit Corridor Alternatives Analysis and Rail Network Integration Study – Business Plan for Electric Passenger Rail on the Santa Cruz Branch Rail Line**

The Regional Transportation Commission (RTC) staff presented the draft Business Plan for electric passenger rail on the Santa Cruz Branch Rail Line (SCBRL) and received public input. The RTC considered a motion to accept the business plan and seek funding for an environmental document, which failed on a 6-6 vote. The RTC directed staff to return to the next meeting with response to questions associated with producing a final report for grant compliance.

### **Fiscal Year (FY) 2021-22 Proposed Budget**

The Regional Transportation Commission (RTC) adopted a resolution approving the proposed FY2021-22 RTC and Measure D budgets; accepted the Measure D revenue forecast for FY 2020-21 and FY 2021-22 provided by HDL Services; accepted the 30-year revenue projection which incorporates the HDL forecast for FY 2020-21 and FY 2021-22; and accepted the 5-year revenue estimates for the Measure D recipients which incorporate the HDL forecast for FY 2021-22 and calculation of the revenue distribution for local jurisdictions with updated data.

### **Highway 1 Projects**

The RTC authorized the RTC to enter into a cooperative agreement with the County of Santa Cruz for environmental mitigation for the Highway 1 41<sup>st</sup> Avenue to Soquel Drive auxiliary lanes and bus-on-shoulder project. The RTC also authorized a cooperative agreement with Caltrans for the Plans, Specifications, and Estimates (PS&E) and Right of Way phases for the Highway 1 Bay /Porter to State Park auxiliary lanes and bus-on-shoulder project.



### **Low Carbon Transit Operations Program (LCTOP) Funds**

The RTC programmed \$489,213 in LCTOP funds to Santa Cruz METRO for its Zero-Emission Watsonville Circulator Operating Project and \$40,460 in LCTOP funds to Community Bridges Lift Line for electric vehicle chargers in Watsonville.

### **Upcoming RTC and Committee Meetings**

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### **Regional Transportation Commission Meeting**

Thursday, May 6, 2021, 9:00 a.m.

### **Budget, Administration & Personnel Committee Meeting**

Thursday, May 13, 2021, 3:00 p.m.

### **Bicycle Advisory Committee Special Meeting**

Monday, April 12, 2021, 6:00 p.m.

### **Elderly & Disabled Transportation Advisory Committee**

Tuesday, April 13, 2021, 1:30 p.m.

### **Interagency Technical Advisory Committee**

Thursday, April 15, 2021, 1:30 p.m.

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For Immediate Release  
Date: February 25, 2021  
Contact: Danielle Glagola  
(831) 420-2550  
[dglagola@scmtd.com](mailto:dglagola@scmtd.com)  
[scmtd.com](http://scmtd.com)



## **Santa Cruz METRO Announces Free Fares County-Wide for COVID-19 Vaccination Appointments**

**Santa Cruz, CA (Thursday, February 25, 2021)** - The Santa Cruz Metropolitan Transit District (METRO) announces that METRO will be providing free local transit rides to and from COVID-19 vaccination appointments in Santa Cruz County starting Friday, February 26, 2021.

Riders who are interested in using METRO to transport them to and from their COVID-19 vaccination appointments must let the operator know when boarding the vehicle and show proof of the vaccination appointment. Proof of vaccination appointment includes a photo, printout, or email of the confirmed appointment slot or vaccination card. Free fares for vaccination appointments will be available to all fixed-route and ParaCruz riders. Customers who are eligible and enrolled in METRO's ParaCruz service will need to specify ahead of time that they are going to and from a vaccination appointment at the time of making the reservation for the free fare to apply.

"The health and safety of our community has been a priority for METRO since the start of the COVID-19 pandemic and providing essential travel is one of the ways METRO makes good on this commitment. So offering free fares to COVID-19 vaccination appointments is another way METRO can give back to our county. By offering these free fares we hope to open up transportation options to our entire community in getting to these essential vaccination appointments." Alex Clifford, METRO CEO/General Manager.

METRO continues to follow public health guidelines from official sources such as CDC, State, and local guidance whenever possible to support safe travel. Including cleaning and disinfecting transit vehicles frequently, requiring face coverings, and installing additional safety measures. In addition, METRO puts health first by requiring riders and employees to avoid public transit if they have been exposed to COVID-19 or feel ill.

This promotion, offering riders free transportation to and from vaccination appointments is just another way METRO is committing to the health and safety of our customers and operators. This free fare program will provide a touchless boarding process without the need to navigate fare payment, minimize interaction between riders and operators, and reduce boarding times at bus stops while giving back to our community.

METRO will continue to enforce physical distancing guidance onboard vehicles, and limit the number of passengers onboard at any given time.

If you haven't used METRO services in the past we encourage you try us out free on your way to and from vaccination appointments.

For information on METRO, visit [scmtd.com](http://scmtd.com). For future fare purchases, check out our touchless and contactless mobile ticketing app, METRO's Splash Pass, at [scmtd.com/apps](http://scmtd.com/apps).

For information on METRO routes and schedules visit [scmtd.com/en/routes](http://scmtd.com/en/routes) or to stay connected to bus arrival information visit [scmtd.com/en/riders-guide/stay-connected](http://scmtd.com/en/riders-guide/stay-connected).

###



**About Santa Cruz Metropolitan Transit District:**

Established in 1968, Santa Cruz METRO provides fixed-route and Highway 17 commuter service throughout Santa Cruz County, with limited service connecting to Monterey Salinas Transit at our Watsonville Transit Center and Santa Clara County, transporting more than 5 million passenger trips a year. METRO also operates ParaCruz paratransit service to Santa Cruz County, providing about 73,500 trips per year. METRO's operating budget in FY21 is almost \$55 million and is funded through a combination of farebox revenue, sales tax, and state and federal sources. Today it operates a fleet of 94 buses on at least 24 fixed-routes. For more information, visit [www.scmtd.com](http://www.scmtd.com). Like METRO on Facebook at [www.facebook.com/SantaCruzMETRO](https://www.facebook.com/SantaCruzMETRO) or follow us on Twitter at [www.twitter.com/SantaCruzMETRO](https://www.twitter.com/SantaCruzMETRO).




# STREETSBLOG

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## Walk S.F. Wants Your Help on Three Key Safety Bills

Write a letter, send an email, sign a petition--your life or the lives of people you care about may depend on it

By Roger Rudick | Apr 5, 2021 |  2 COMMENTS



*Note: [GJEL Accident Attorneys](#) regularly sponsors coverage on Streetsblog San Francisco and Streetsblog California. Unless noted in the story, GJEL Accident Attorneys is not consulted for the content or editorial direction of the sponsored content.*

**T**hree key safety bills are starting their journeys through the state legislature.

- A.B. 550: Speed Safety System Pilot Program
- A.B. 43: Setting Speed Limits to Enhance Traffic Safety





- A.B. 1238: The Freedom To Walk Act



“Walk SF is doing everything in our power to help pass these three bills, including sponsoring A.B. 550,” wrote Walk San Francisco’s Jodie Medeiros, [in a blog post last week](#). “Hearings will start around mid-April for these bills. By that time, we need lots of letters of support already submitted.”

Walk S.F. has created [a page](#) with all the information needed to support the bills. As the bill names imply, they are all essential to achieving Vision Zero.

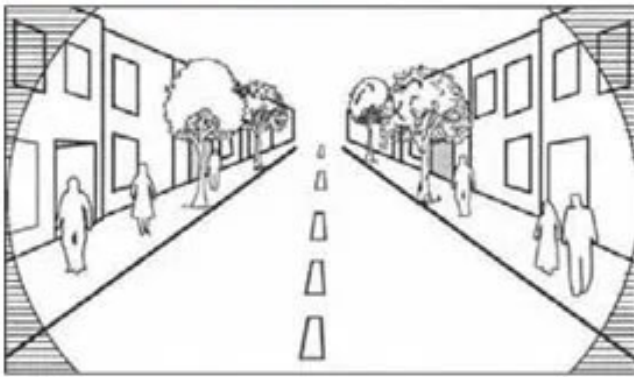
The first one, A.B. 550, would give San Francisco the ability to [pilot “Automated Speed Enforcement,”](#) commonly known as speed cameras, to help reduce speeding and eliminate bias in enforcement. “Speed is the number one cause of severe and fatal crashes. Speed safety enforcement systems dramatically shift behavior and can reduce the number of severe and fatal crashes by as much as 58 percent. More than 150 communities in the United States have already embraced speed detection technology,” added Medeiros. [As previously reported](#), for years now San Francisco’s advocates and law makers have tried to get a pilot going. This is [the latest attempt by San Francisco Assemblymember David Chiu to change California law so San Francisco can use this all-important tool](#) for reducing fatalities and serious injuries on city streets.

The next is a little more complex, but just as important. Cities are actually limited in their ability to adjust speed limits by [state guidelines](#). So San Francisco could end up in a situation where it gets the tools to enforce speed limits, but can’t legally lower them enough to make all streets safe. “There are many streets here in San Francisco that should have lower speed limits, but the City is unable to change them,” writes Medeiros. “Maddeningly, current California law requires speed limits to be set based on how fast most drivers are going, not on what’s needed to keep people safe.” Called the 85th Percentile Rule, it [means speed limits are adjusted not by safety requirements, but by how fast most motorists drive](#). A.B. 43 assures that “safety first” is more than just a slogan and that speed limits are set in response to the number and severity of crashes, not how fast motorists want to drive.

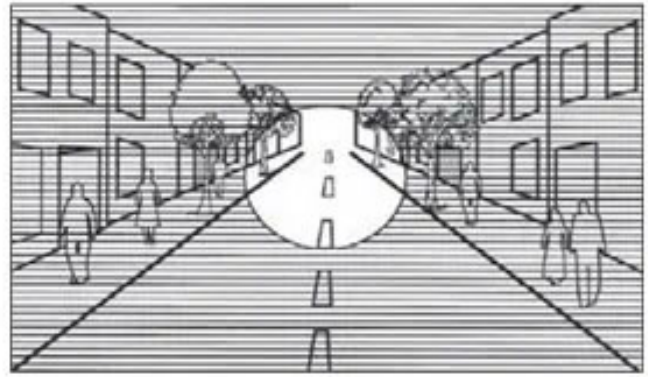




## WHY SPEED MATTERS

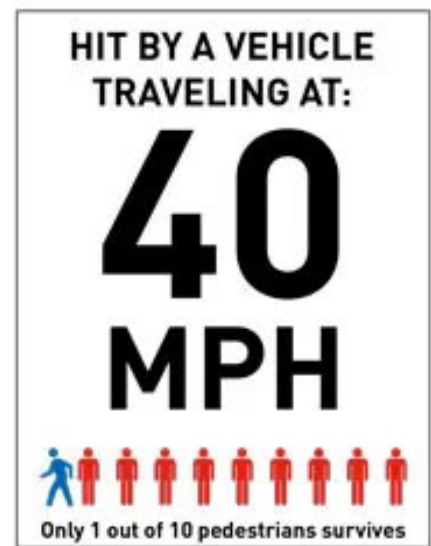
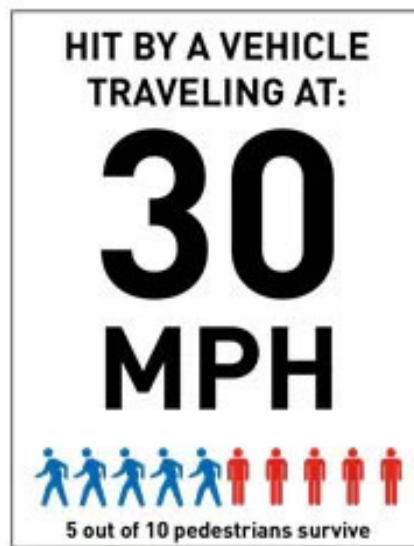


Field of vision at 15 MPH



Field of vision at 30 to 40 MPH

*A driver's field of vision increases as speed decreases. At lower speeds, drivers can see more of their surroundings and have more time to see and react to potential hazards.*



*Speed is especially lethal for vulnerable users like pedestrians and people biking. The risk of injury and death increases as speed increases.*

Lastly, there's A.B. 1238: The Freedom To Walk Act. This bill aims to undo the idea that pedestrians are only permitted to cross at designated crossings. According to the language of the bill, if no cars are coming and it's safe to do so, a pedestrian will be able to cross the street outside of a crosswalk without fear of getting cited.

For those not familiar with the history of the manufactured crime called "jaywalking," watch this great video by [Adam Conover](#) (embedded below). Basically, "jaywalking" is an early 20th Century invention by automakers that enabled them to sell more cars amidst a growing outcry over the number of deaths and injuries motorists were causing on streets that had previously been open to everyone.



## Adam Ruins Everything - Why Jaywalking Is a Crime



Moreover, "...jaywalking tickets are disproportionately given to people of color, and these encounters with police can turn life-threatening. There is no evidence that jaywalking laws make streets safer, especially for the most vulnerable pedestrians: children and seniors," wrote Medeiros. Basically, ["jaywalking" does nothing to reduce traffic violence and instead results in far more harm](#) than good.

For the full rundown on the three bills, check out [Walk San Francisco's full post](#). And follow the links they've provided to show your support for each bill.

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Filed Under: "Safe Streets", Safety, Streetsblog SF

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**AGENDA:** April 13, 2021

**TO:** Elderly & Disabled Transportation Advisory Committee  
**FROM:** Amanda Marino, Transportation Planner  
**RE:** FY 2021-22 Transportation Development Act Funds for Community Bridges

---

## **RECOMMENDATION**

Staff recommends that the Elderly & Disabled Transportation Advisory Committee:

1. Review the FY 2021-22 claim for TDA funds from Community Bridges in the amount of \$ 733,747 and recommend approval by the Regional Transportation Commission; and,
  2. Review the FY 2021-22 claim for State Transit Assistance Funds (STA) funds from Community Bridges in the amount of \$100,000 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 7.25 cent sales tax according to state law and established formulas in the Commission's Rules and Regulations. The RTC's FY 2021-22 budget was approved by the RTC Budget and Administration Personnel Committee (B&A/P) on April 1, 2021 and includes TDA allocations based on the Santa Cruz County Auditor's estimates. At its September 5, 2019 meeting, the RTC indicated its intent to allocate \$100,000 per year of the RTC's population shares (PUC 99313) of FY 2019-20 – FY 2021-22 State Transit Assistance (STA) funds to Community Bridges Lift Line and to allocate the balance of the RTC's FY 2019-20 – FY 2021-22 shares of State Transit Assistance (STA) and 100% of the region's population shares (PUC 99313) of FY 2019-20 – FY 2021-22 SB1-transit State of Good Repair funds to Santa Cruz METRO.

## **DISCUSSION**

### ***Transportation Development Act (TDA)***

The Regional Transportation Commission (RTC) FY 2021-22 budget includes Transportation Development Act (TDA) allocations for Community Bridges in the amount of \$ 733,747. 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 36,000 one-way trips using their Taxi Scrip, Medical TDA, Meals on Wheels, Elderday, and Essential Service Transportation programs to eligible clients over FY 2021-22.



Community Bridges staff will provide an overview of their TDA and STA 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.

### ***State Transit Assistance Funds (STA)***

State Transit Assistance (STA) funds include population-based formula funds (PUC Section 99313) which are available for projects approved by the RTC, as well as 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.

At the RTC September 5, 2019 meeting, the RTC took action indicating its intent to allocate \$100,000 per year of the RTC's population shares (PUC 99313) of FY 2019-20 – FY 2021-22 State Transit Assistance (STA) funds to Community Bridges Lift Line.

By utilizing \$100,000 in FY 2021-22 STA funds, Lift Line will continue the level of same day and out of county medical transportation services identified in the RTC Unmet Needs Plan. These funds will ensure that Lift Line will not have to reduce services up to 50% due to the lack of FTA Section 5310 funding in February 2021. These funds will allow for the continuation of these programs through FY 2022.

**Staff recommends that the E&D TAC review the FY 2021-22 TDA and STA claim for Community Bridges and recommend approval by the Regional Transportation Commission, 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 2021-22 Community Bridges TDA/STA Claim and operation/budget pages.

\\RTCSERV2\INTERNAL\E&DTAC\2021\04-2021\TDA\SR\_TDA\_COMMUNITYBRIDGES.DOCX



## **Attachment 1**

### **Transportation Development Act (TDA) 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: Lift Line / CTSA Specialized Paratransit Service for Santa Cruz County
2. Implementing Agency: Community Bridges
3. Sponsoring Agency (if different) – must be a TDA Eligible Claimant:

The City of Santa Cruz acts as the eligible TDA claimant for Lift Line.  
Lift Line receives the TDA funds through a contract with the City of Santa Cruz.

4. Funding requested this claim: TDA \$ 733,747  
STA (transit only) \$100,000
5. Fiscal Year (FY) for which funds are claimed: FY 21/22
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: Kirk Ance

Telephone Number: 831-688-8840 ext. 238

E-mail: kirka@cbridges.org

Secondary Contact (in event primary not available): Raymon Cancino

Telephone Number: 831-688-8840 ext. 201

E-mail: raymonc@cbridges.org

8. Project/Program Description/Scope (use additional pages, if needed, to provide details such as work elements/tasks.  
*Please see Exhibit C-1 and C-2 attached.*

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

The TDA and STA funding for CTSA will be used to coordinate and provide social service transportation services with existing fixed-route of public and private transportation providers for low-income elderly and disabled Santa Cruz County residents, per the requirements of the Social Services Transportation Improvement Act.



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)

Since 1982, Community Bridges has been the designated Consolidated Transportation Services Agency (CTSA) in Santa Cruz County. CTSA's are authorized under the California Government Code Sections 15975 and 15950-15952, which were enacted under the Social Service Transportation Improvement Act. The CTSA aims to improve transportation required by social service recipients by promoting the consolidation and coordinating of social service transportation. As the CTSA, Lift Line coordinates transportation services with other transportation providers and human service agencies to provide the most efficient transportation possible. These agencies include the 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.

Additionally, Lift Line works closely with several other non-profit organizations and neighboring counties to identify unmet needs and define effective responses to meet those needs through coordinated efforts with various partnerships and commissions. These efforts' ultimate goal is to mobilize disabled, low-income, and senior Santa Cruz County residents to critical medical needs to maintain their overall health. Lift Line supports a vital lifeline for eligible participants to access healthcare providers unavailable in our region, including destinations to Monterey County and the San Francisco Bay Area for medically complex patients needing specialized care. This transportation service is consistent with the Association of Monterey Bay Area Governments (AMBAG) Coordinated Public Transit Plan to provide comprehensive coordination.

Per the CTSA designation for Santa Cruz County, Community Bridges operates the Lift Line transportation program and identifies unmet transportation needs, coordinates and provides social service transportation 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, various therapy appointments, and recently COVID-19 vaccinations appointments. Additionally, we provide the only service to residents who live outside of the METRO ParaCruz service area and ensure transportation support services locally.

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 scheduling is automated with Mobile Data Computers and Automatic Vehicle Locators (AVL) that integrate with Trapeze, making changes if needed and track rides in real-time. As rides are completed, the MDTs tag completed rides with actual pickup and drop-off times and highlight these times in blue, making it easier for our dispatchers to monitor all rides. In contrast, 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 AVLs in the fleet allows Lift Line to monitor and track vehicles in real-time at any moment. These systems enable Lift Line to provide accurate monthly data to satisfy data reporting requirements.

We will continue to provide our quarterly TDA/STA reports per the RTC reporting requirements generated directly from the actual rides performed and recorded through these systems. Lift Line's dispatch and scheduling systems still have some manual components to be used in power loss or technical difficulties. Since we cannot determine in advance when power or technical problem will arise, daily we provide all drivers with a paper manifest as a backup.



Drivers daily fill out paperwork to let us know if they have any incidents, accidents, or mechanical failures. To track turndowns and referrals, schedulers and dispatchers keep a dispatch log. Also, any turndown is offered an option of being placed on a waiting list if there becomes an opening with a driver's schedule.

**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 transportation services to nearly 900 Santa Cruz County residents who will use specialized wheel-chair accessible vans. We are projecting to offer and coordinate over 36,000 rides in the 20/21 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. We will continue to target and offer services to Santa Cruz County residents who are outside of the METRO ParaCruz service area. Trips are supplied to health and medical destinations such as hospitals, medical centers and clinics, doctors' offices, dental offices, pharmacies, dialysis centers, mental health, physical therapy, essential services, and social service programs. In partnership with the Central Coast Alliance for Health, rides to medical destinations will be provided to Medi-Cal members. Lift Line continues to work with Satellite Dialysis in Santa Cruz County to offer flexible services to its clients who cannot use fixed-route transit or METRO ParaCruz services to meet their needs.

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?

Lift Line services are consistent with 2040 RTP goals 1 and 3 and advance:



- Target #3c of the 2040 RTP: Reduce travel times and increase travel options for people who are considered 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).
- 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 that improves efficiencies, and reduces duplication.
- Demonstrate that planned investments will reduce disparities in safety and access for transportation disadvantaged populations.
- Support land use decisions that locate new facilities close to existing services, particularly those that service transportation disadvantaged populations.

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

Lift Line is a complimentary service to the ADA-mandated METRO ParaCruz service and covers service areas that are not covered by METRO ParaCruz. Also, Lift Line provides a flexible specialized transportation service for ongoing identified unmet immediate service needs. Lift Line's implementation of the Electric Vehicle (EV) fleet will continue to offer an increased positive impact, especially in disadvantaged communities, by reducing emissions. Lift Line continues to optimize our service by scheduling rides and routes in the most efficient manner through our scheduling software, Trapeze, for long-distance and cross county rides. This service ultimately reduces travel time and cuts down the amount of time our clients, most of whom have a chronic condition, have to spend on the vehicle.

Furthermore, for residents who reside outside the service area (more than 3/4 from a fixed route), Lift Line meets their needs by providing specialized transportation. Lift Line's specialized transportation also meets the needs of older adults and disabled residents unable to afford the cost of transportation, do not have family or friends to assist them, or may need same-day service. For low-income people or who face health and physical challenges, this service is crucial to maintain their health and independence.

Lift Line was awarded Section 5310 grant funding for operating in 2018-2021 to support same-day and out-of-county medical transportation service, as identified in the AMBAG unmet needs plan. Lift Line implemented this new service in 2013 because it was underfunded to operate at full capacity; Lift Line used matching funds from STA. The 5310 funding ended on February 28, 2021. Because this is a vital service, Lift Line will investigate options for new funding sources to match with the STA funding to keep this program operating as close to the same capacity as possible. Without additional funding, the program will have to be reduced to 50% capacity.

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 = \$2,088,771 (of which \$733,747 are TDA funds and \$100,000 STA funds). 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 _____ (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).	NO
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: <a href="http://www.dot.ca.gov">http://www.dot.ca.gov</a> ).	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 restructured to increase productivity. Through our scheduling software, Trapeze, we can schedule the most efficient route for long-distance and cross-county rides, optimize our proficiencies, and reduce miles traveled. This efficiency keeps operating costs down and helps keep the cost per service unit as low as possible. Failing to restructure and maximize productivity would lead to increased cost per service unit. In the case of taxi subcontractors, we have paid particular attention to maximizing the benefit of working with these outside partners only when we have reached our existing internal capacity. We continue to work with physicians' offices and clients to improve efficiency through scheduling rides that will not lead to long delays. Our experienced drivers, schedulers, and dispatch staff, using computerized scheduling equipment, continue to serve as valuable assets toward achieving these goals.

Lift Line continues to work with the SMART Union to address ways to lower the economic issues impacting the budget's operations. We also continue to reduce our worker's compensation costs and exposures to reduce our premiums. Lift Line maintains an optimum fleet size for the services provided, and we continually seek to update our vehicles and equipment through various grants.



Due to the impacts of COVID-19 over the last year, Lift Line has had to restructure how we deliver some of our services and add new services to meet new and emerging needs. With congregate programs significantly reducing their capacity or closing down congregate services completely, Lift Line restructured how we provide Meals on Wheels services. Instead of transporting clients to the four congregate meal sites, Lift Line delivers meals directly to the client's homes.

To fulfill emerging needs due to COVID-19, in March of 2020 Lift Line expanded services to provide Santa Cruz County seniors and persons with disabilities free transportation to grocery stores, essential medical appointments, banks, social service programs. Lift Line also offered an alternative where drivers pick up groceries and prescriptions for clients without them needing to leave their homes. This program is known as our Essential Service program and is still in operation today to ensure we are contributing the flattening the pandemic curve. To ensure our constituents were aware of this new service, a press release was disseminated to local media in March of 2020.

During COVID-19, Lift Line supported the County of Santa Cruz Human Service Department by participating in the Great Plate's project. Lift Line delivered meals three days per week to some of the most vulnerable senior residents of the County that were limited to food access. While the Great Plates program ended through the County of Santa Cruz, Lift Line was able to secure funding from Kaiser and the Teen Kitchen Project to maintain this project on the same schedule and will be able to continue operating through the end of October 2021.

On February 9, 2021, Lift Line began coordinating with the Community Bridges COVID Vaccination Helpline and Sutter Hospital to prioritize senior and disabled transportation to COVID-19 vaccination sites. Lift Line notified current participants of this new service to ensure they were prioritized, furthering meeting the needs of hard-to-reach populations. Lift Line secured one-time-only funding of \$7,000 through the Area Agency on Aging (AAA) for additional vaccination trips and outreach.

Additionally, during the August CZU Lightning Complex Fires, Lift Line was on the frontlines providing evacuation transportation to safe sites and delivered meals to evacuees. Lift Line provided evacuation support and meal deliveries to fire survivors through August 2020 - November 2020.

We have increased our outreach by working with the County Health Services Department, local medical facilities, and the Senior Network Services to ensure their clients fill out the TDA Medical Transportation Application and fax the application with required supporting documents to our office regularly. In 2020 we added our client enrollment application to our Lift Line website to expedite enrollment and ridership, 80% of new applicants are now submitted through the online portal. We have also increased our coordination with the Central Coast Alliance for Health to coordinate medical rides for Medi-Cal eligible participants.

Lift Line has participated in several outreach forums through online meetings in the community that address the transportation needs for the local senior and disabled population and make announcements when we have new services such as the Essential services and Vaccination 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 regularly and structure our routes and staffing accordingly. Lift Line staff will continue to participate in outreach efforts to identify emerging needs in the community. 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 will continue to increase our client base and educate clients about all of our



services.

To increase productivity, we continue to train drivers to quickly and efficiently obtain their Commercial Class C driver's license. The driver trainer works as a backup driver, which helps fill gaps when needed.

Lift Line is participating in the Community Bridges ten programs client data migration that will improve triaging between the program based on clients' identified needs. For example, if a client is applying to Elderday or Meals on Wheels, Lift Line will determine if that applicant also qualifies for Lift Line services. As a result, as an agency, we are serving the overall need of our constituents.

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

Community Bridges' Lift Line requests TDA and STA funds to assist with the comprehensive list of ride types as last year but will shift a portion of TDA allocations from Elderday to TDA Medical due to the decrease in the number of participants that can congregate at Elderday.

As of writing, it is not known but estimated when Elderday will be allowed to run at full capacity for in-person services and therefore we estimate that Elderday will be at 75% capacity for the fiscal year.

Lift Line requests funding to provide the following, Medical TDA Rides, Meals on Wheels, Taxi Scrip, Elderday, and TDA Essential and Social Services Rides. Additionally, we will use STA funds to continue the Same Day and Out of County programs at a reduced capacity due to 5310 funding ending February 28, 2021. This will allow us to prolong the duration of same day and out of county transportation program by providing 1,432 rides through FY 21/22 with STA funding. Lift Line will continue to research and apply to new funding sources to increase access to Lift Line services and meet the needs of those we serve.

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 2021, Jan 2022, Apr 2022, Jul 2022 and year-end report 21/22

**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.

Residents requesting out-of-county medical rides for acute care treatment are often those who have no other resources, mainly due to financial restraints, to get to critical care treatment or require specialized care that is unavailable in our community. The veterans we serve are perfect examples as they are limited to the Veterans Affairs clinics outside of Santa Cruz County. Lift Line can meet these needs through the STA funds and formerly FTA Section 5310 funds which ended February 28, 2021.

Even though the 5310 funds for this service ended, Lift Line/CTSA continues to seek other funding sources to support this service, which is an unmet need in the coordinated plan. STA funding will allow us to seek matching funds to operate this program to increase capacity and provide additional transportation for the same-day and out-of-county programs.



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 or means. We coordinate and refer people regularly to other services more suited to their specialized transportation requirements. Our referral partnerships include METRO fixed route or METRO ParaCruz; local taxi services through the taxi scrip program; and volunteer-led programs such as the Volunteer Center and Veterans Services.

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. These reports include the performance measures listed above in section 11a.

23. Discuss the needs and types of the passengers being served, 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)

Lift Line serves over 900 low-income seniors and disabled residents, many of whom have Medi-Cal or Veterans Administration coverage and a chronic health condition. Out of those we serve, 92% live below 200% of the Federal Poverty Level with an income of less than \$2,000 per month. One in four (28%) are over the age of 80, 22% are ages 70-80, 28% are ages 50-70, and 22% are under 50. Additionally, 45% identify as Latino or Hispanic, 50% white, and the remaining 5% as other. One third of our participants are monolingual Spanish speakers, and two-thirds of our clients use a wheelchair or lift. Most of our participants are residents of Santa Cruz County; 454 (35%) of our participants live in Watsonville, 9% in unincorporated South Santa Cruz County, 20% in mid-county, 18% in Santa Cruz, and 5% in San Lorenzo Valley. Approximately 2.5% of our clients live in Pajaro, Prunedale, and other Monterey County locations.

To be eligible for Lift Line services, individuals must be over the age of 60 or have a verified disability. A physician or other state disability verification determines medical eligibility. Additionally, the applicant must meet the income eligibility threshold of 200% below the federal poverty level.

Lift Line contracts with local taxi services to provide transportation outside of normal operating hours. Additionally, in some circumstances (shorter trips) it is most cost effective or necessary for our clients to use taxi scripts. This flexibility for our clients allows Lift Line to serve clients outside normal operating hours.

During peak service days, Lift Line currently has two on-call drivers to assist with paratransit services. The on-call drivers also provide support when one or more full-time drivers request time off. We also currently have one part-time driver that helps us out during peak service days.



24. SCMTD, CTSA, 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 cover  
FYs 2016-2018. Two recommendations noted:

- 1) “Community Bridges should conduct survey of taxi scrip riders to determine service needs”.

Lift Line completed the survey in 2020. The key finding include:

- Taxi Script is a vital part of my transportation: 54% always, 43% sometimes.
- Without the taxi script, I wouldn’t be able to make all my medical appointments: 41% always, 48% sometimes.
- Without the taxi script, I wouldn’t have any other means of transportation: 28% always, 59% sometimes.
- The monthly taxi script allowance is enough to meet my needs: 52% always, 35% sometimes.

- 2) “Community Bridges should report on-time performance in the TDA Quarterly Performance Report”.

On-time performance is closely associated with fixed route where there are regular scheduled stops at a bus stop. It is not a good fit for paratransit as the rides are often grouped rides of up to 14 passengers and tracking the pickup times would be challenging. We also have instituted a 30 minutes pick up window following the ADA guidelines. Lift Line is in talks with the RTC as how to proceed and we have been informed by the RTC for FY20/21, that they are not requiring Lift Line to report on-time performance. Further, the RTC has made a commitment to work with Lift Line on a solution or response concerning on-time performance. We anticipate using the 30-minute pick-up window as the benchmark for this measure to determine on-time reporting.

**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**

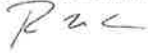


☒ **Written report** of current and upcoming activities. (*per RTC Rules and Regulations*)

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***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: 3/31/2021

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## TDA Standard Assurances Checklist

**Claimant:** Raymon Cancino

**Fiscal Year:** 21/22

Assurance	Initial
<b>1. CERTIFIED FISCAL AUDIT (All Claimants)</b> Claimant certifies that it has submitted a satisfactory, independent fiscal audit, with the required certification statement, to (RTPA name) and to the State Controller's Office, pursuant to PUC 99245 and CCR 6664 for the prior fiscal year (project year minus two). Claimant assures that this audit requirement will be completed for the current fiscal year (project year minus one). <i>This requirement does not apply to new operators.</i>	RC
<b>2. STATE CONTROLLER REPORT (All Claimants)</b> Claimant certifies that it has submitted a State Controller's report in conformance with the uniform system of accounts and reports, to (RTPA name) and to the State Controller, pursuant to PUC 99243, for the prior year (project year minus two). Claimant assures that this report will be completed for the current fiscal year (project year minus one). <i>This requirement does not apply to new operators.</i>	RC
<b>3. PART-TIME EMPLOYEES (STAFF ONLY) (STA Claimants Only)</b> Claimant certifies that it is not precluded, by any contract, from employing part-time drivers or contracting with common carriers of persons operating under a franchise or license.	RC
<b>4. REVENUE RATIOS FOR COMMUNITY TRANSIT AND CONTRACTED TRANSIT SERVICES (CTSA &amp; Volunteer Center Only)</b> Claimant filing a claim pursuant to PUC 99275.5c and 99405c further certifies that, for the project year, it reasonably anticipates achieving the performance criteria, local match requirements, or fare recovery ratios adopted by the transportation planning agency or county transportation commission.	RC
<b>5. REVENUE RATIOS FOR OPERATORS SERVING URBANIZED AND NONURBANIZED AREAS (METRO Only)</b> Claimant filing a claim pursuant to PUC 99270.1 certifies that it will maintain for the project year at least the alternative farebox recovery ratio as determined by the adopted (RTPA name) "fare ratio optional rule."	
<b>6. EXTENSION OF SERVICES (METRO Only)</b> Claimant that received an allocation of LTF funds for an extension of service pursuant to PUC 99268.8 certifies that it will file a report of these services pursuant to CCR 6633.8b within 90 days after the close of the fiscal year in which that allocation was granted.	
<b>7. RETIREMENT SYSTEM (METRO Only)</b> Claimant filing claim pursuant to PUC Section 99260 certifies that (check one):	
a) The current cost of its retirement system is fully funded with respect to the officers and employees of its public transportation system (PUC Section 99271a); or	
b) The operator is implementing a plan approved by the transportation planning agency which will fully fund the retirement system for such officers and employees within 40 years (PUC Section 99271a); or	
c) The operator has a private pension plan which sets aside and invests on a current basis funds sufficient to provide for the payment of future pension benefits and which is fully compliant with the requirements stated in PUC Sections 99272 and 99273.	
<b>8. USE OF FEDERAL FUNDS (Claimants Receiving Federal Funds)</b> Claimant filing a claim for TDA funds for capital intensive projects pursuant to PUC 99268.7 certifies that it has made every effort to obtain federal funding for any project which is funded pursuant to PUC 99268.7.	RC
<b>9. REDUCED FARES FOR ELDERLY AND HANDICAPPED (METRO Only)</b> A claimant filing a claim pursuant to PUC 99260 which offers reduced fares to senior citizens and disabled persons certifies that it is in compliance with PUC 99155.	



<b>10. DRIVERS PULL NOTICE PARTICIPATION (METRO &amp; Community Bridges Only)</b> A claimant filing a claim for public transit assistance must include a certification completed within the prior 13 months by the California Highway Patrol indicating the operator has participated in a "pull notice system" to examine driver's records.	RC
<b>11. INCREASE IN OPERATOR'S COST PER HOUR (STA Claimants Only)</b> Claimant filing a claim for operating assistance from STAF funds must include a supplemental schedule which identifies either: A - 1) the most recent audited cost per revenue vehicle hour (year 1) and the cost per revenue hour for the year prior to the most recent audit year (year 2) and 2) the Consumer Price Index for the year prior to the most recent audit year (year 2); or B - 1) the most recent audited cost per revenue vehicle hour (year 1) and the cost per revenue hour for the three years prior to the most recent audit year and 2) the Consumer Price Index for the three years prior to the most recent audit year. The supplemental schedule information will be used to determine eligibility pursuant to PUC 99314.6.	RC
<b>12. STAFFING ON VEHICLES (METRO &amp; Community Bridges Only)</b> Claimant certifies that it is in compliance with PUC Section 99264 that it does not routinely staff, with two or more persons, a vehicle for public transportation purposes designed to be operated by one person.	RC

CTSA - Community Bridges - Lift Line

\_\_\_\_\_  
(Legal Name of Applicant/Claimant)

*JRC*

\_\_\_\_\_  
(Authorizing Signature of CEO/CFO)

Raymon Cancino, Chief Executive Officer

\_\_\_\_\_  
(Name and Title)



**Lift Line 2021-22 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.

With a current fleet of 24 vehicles, Lift Line provides a variety of paratransit transportation services to seniors and individuals with disabilities. Lift Line provides and coordinates the most accessible, reliable and safe transportation possible. We provided more than 46,000 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. seven days a week, excluding most major holidays. Hours of operation are extended in the case of emergencies, special occasion, and special requests. Lift Line also coordinates and schedules taxi rides provided outside of business hours.

Lift Line has been approved through the SCCRTC with LCTOP funds to purchase a small 9-passenger fully electric paratransit bus and two level-3 charging stations, helping us expand our emissions reduction goals even further. These stations will allow quick charging of 80% in 20 minutes. The chargers will be located at our fleet facility in Watsonville and Felton at the Mountain Community Resources Center located at 6134 Highway 9. The Felton electric vehicle (EV) charging station helps expand our reach with EVs. We will not have to travel back to Watsonville to recharge, allowing Lift Line to cover extended distances. We are pleased to build a clean energy grid that helps accelerate the transition to zero-emission vehicles. Planning and permitting is complete for Felton, and we have submitted an application with PG&E for the required power upgrade. For the Watsonville site, we are still in the permitting phase with the city. There is also a planned service upgrade with PG&E for this project. We discovered that PG&E could take up to one year to review and approve applications, creating delays in the project. However, the project is moving forward as quickly as possible.

The EV bus is currently in operation, providing rides. There are no problems in charging the EV bus as we have two existing EV level II chargers presently operating at our operations facility located at 545 Ohlone Parkway in Watsonville. The vehicle takes about 15 hours to charge fully, and we can charge them overnight while they are not in use.

**Current Services:**

**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:** Normally, Lift Line provides transportation to four senior dining centers throughout the County five days per week. Due to COVID-19 restrictions on in-person services, congregate meal sites are temporarily closed. Lift Line restructured how we services the Meals on Wheels program, instead of transporting clients to the four congregate meal sites Lift Line delivers meals directly to client's homes. We plan to continue providing the home delivered meals until the dining centers reopen, at that time we will return to the dining center transportation.

**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). Due to the decrease demand of Taxi Scrip rides in FY 19/20, Lift Line is temporarily lifting the limit of scrips per person in attempts to increase actual demands. We have had requests from some clients wanting more than the allowed limit. The current maximum amount is \$180 worth of scrip per quarter. The cost of that Scrip will range between \$96 or \$48 depending on income.

**Elderday Adult Day Health Care Transportation:** Transportation is provided to the Elderday program that provides outpatient day health care to the most medically complex seniors and people with medically complex histories who are in need of constant care, and/or are diagnosed with dementia.

**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. This program will continue with STA funding.

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

**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. This program will continue with STA funding.

**Outside Contracts:** Lift Line is available for community events for groups needing specialized transportation that requires accessibility for the elderly and disabled.

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

## **COVID-19 Impacts**

### **Essential Service Transportation:**

Due to COVID-19 impacts on older adults and people with disabilities, Lift Line shifted its resources and expanded services beginning in March 2020 to provide much needed essential transportation to grocery stores, pharmacies, banks, and social services programs. We also offer the option to pick up groceries and prescriptions for clients without them leaving their homes. The Lift Line drivers will pick up and deliver the personal needs of the clients, contributing the efforts of flattening the pandemic curve.

We temporarily removed the need for an application to schedule rides in order to remove barriers to access. However, interested individuals must be older adults (60 years and older) or have a disability proven by a physician. This program is still currently operating.

### **Vaccination Transportation:**

In February 2021, Lift Line began coordinating transportation to vaccine sites with the Community Bridges COVID Vaccination Helpline and Sutter Hospital. This effort aligns with the State and the County's goal of prioritizing vaccines for older adults and those most vulnerable to a COVID-19 related illness or death. Lift Line ensured current participants were aware of this new service through outreach and communication and supported their current riders in accessing vaccines. Most of them are low-income and face technology barriers that would have impeded them from accessing vaccines independently. Lift Line secured one-time funding of \$7,000 through the Area Agency on Aging (AAA) for additional vaccination trips and outreach to continue this effort. This program is currently in operation.

### **Great Plate's Project:**



In the last year, Lift Line supported the County of Santa Cruz Human Service Department by participating in the Great Plate's project. Lift Line delivered meals three days per week to some of the county's most vulnerable senior residents that were limited to food access. While the Great Plates Project ended, Lift Line was able to secure funding from Kaiser and Teen Kitchen to maintain this project on the same schedule and will be able to continue operating through the end of October 2021.

### **Challenges**

The immediate challenge has been operating under the COVID-19 environment. It has led to some staff shortages, as we take precautions to ensure our staff and clients' health and safety. Any staff member with a fever of 99.9 or above or two or more COVID symptoms will quarantine at home for fourteen days. This added precaution is particularly impactful to our operations as we have to unschedule rides and rearrange schedules among the limited staff.

Lift Line continues having challenges with our taxi subcontractors.

Santa Cruz Yellow Cab has become unreliable; therefore, we stopped using them to schedule rides. However, they still perform taxi scrip rides, and ridership feedback on the annual survey is positive.

Over the last several months, Watsonville Courtesy Cab has diminished the availability of service for Lift Line. Courtesy has changed requirements for Lift Line, which includes pre-approval of rides before scheduling. With this change, we have faced challenges, including rejection and cancellation of scheduled rides. The challenges we face with Courtesy Cab are due to driver shortages and have not impacted the taxi scrip rides provided to our clients.

Due to these continued barriers with the Taxi Scrip program, Lift Line is researching an alternative solution. At the beginning of March 2021, we started experimenting with Lyft as another option. At this point, the trial is too new, with not enough data generated to determine whether Lyft will be a viable option. So far, the rides tend to be less expensive than a taxi. We will conduct a sample survey over the first couple of months. The feedback loop will include calls to our clients that utilized Lyft. This information will be documented for our records and guide us in determining if this is a viable option. A barrier already identified is that Lyft does not provide wheelchair-accessible vehicles. We see this as another opportunity to look for solutions.



## COMMUNITY BRIDGES - LIFT LINE / CTSA

EXHIBIT A, Page 1 of 2

## TDA 2021-22 BUDGET

ACCOUNT TITLE	TDA/STA 2021-22 BUDGET	Non-TDA 2021-22 BUDGET	CTSA 2021-22 BUDGET	TDA/STA 2020-21 BUDGET	Non-TDA 2020-21 BUDGET	CTSA 2020-21 BUDGET
<b>PERSONNEL:</b>						
Salaries & Wages	362,433	480,244	842,677	316,215	479,577	795,792
Fringe Benefits: Unemployment	5,211	7,429	12,640	4,743	7,194	11,938
Workers Comp	14,579	24,607	39,186	12,551	19,750	32,301
Health Insurance	41,469	65,256	106,725	34,618	73,563	108,181
FICA	27,726	36,739	64,465	24,190	36,625	60,816
401K Plan	6,335	9,968	16,303	3,697	5,818	9,515
<b>TOTAL PERSONNEL COSTS:</b>	<b>457,753</b>	<b>624,242</b>	<b>1,081,995</b>	<b>396,015</b>	<b>622,528</b>	<b>1,018,542</b>
<b>SERVICES &amp; SUPPLIES:</b>						
<b>OPERATING:</b>						
Vehicle Operations-Fuel	35,336	24,722	60,058	31,886	40,210	72,096
Vehicle Licenses	3,834	6,033	9,867	3,834	6,033	9,867
Vehicle Repair & Maintenance	14,603	17,832	32,435	13,015	15,332	28,347
Vehicle Insurance	39,014	35,655	74,669	31,025	45,644	76,669
Communications-Radio	25,291	24,357	49,648	24,290	35,648	59,938
<b>TOTAL VEH. OPERATING COSTS:</b>	<b>118,078</b>	<b>108,599</b>	<b>226,677</b>	<b>104,049</b>	<b>142,868</b>	<b>246,917</b>
<b>OTHER OPERATING &amp; ADMINISTRATION COSTS:</b>						
Professional Services	0	30,867	30,867	2,524	28,059	30,583
Janitorial Services/Supplies	2,565	4,035	6,600	2,565	4,035	6,600
Legal services/Audit	0	0	0	0	1,157	1,157
Publicity/Media	0	12,772	12,772	0	14,591	14,591
Special Events	0	718	718	0	700	700
Staff travel	914	0	914	0	259	259
Minor Equipment	2,599	4,090	6,690	5,240	8,246	13,486
Equip Maintenance/Repair	6,761	6,779	13,540	5,518	8,683	14,201
Office Supplies	735	1,157	1,892	1,313	885	2,198
Program Supplies	3,181	4,257	7,438	3,433	5,403	8,836
Vehicle Maintenance Supplies	44	68	112	39	70	109
Computer Supplies/Related	221	349	570	566	891	1,457
Postage	1,099	1,129	2,228	292	459	751
Utilities	21,998	3,732	25,730	4,970	8,711	13,680
Space Maintenance	2,890	4,548	7,438	3,342	5,260	8,602
Telephone	1,312	1,124	2,436	1,553	883	2,436
Misc Fees	4,191	1,447	5,638	2,027	3,473	5,500
Staff Training	2,025	0	2,025	1,034	1,626	2,660
Insurance-General Liability & Fidelity	3,009	4,735	7,744	1,250	3,750	5,000
Memberships/Subscriptions	3,007	0	3,007	690	2,270	2,960
Printing & Copying	309	486	795	199	596	795
Advertising (Recruitment)	71	112	183	65	114	179
Interest Expense	0	72,000	72,000	0	121,250	121,250
Subsidized Taxi - Elderday Rides	0	0	0	0	0	0
Subsidized Taxi - MOW Rides	0	0	0	0	0	0
Subsidized Taxi - LL Rides	20,175	0	20,175	25,000	0	25,000
Subsidized Taxi - Scrip	22,440	0	22,440	21,335	0	21,335
Nonsubsidized Taxi-Measure D Svcs	0	36,120	36,120	0	19,866	19,866
Trxfer to/from Equip Reserve	0	0	0	0	0	0
300 Facility Reserve	0	205,734	205,734	0	83,513	83,513
Major Equipment - 5310	0	0	0	0	197,554	197,554
Major Equipment - Non-5310	43,542	15,000	58,542	37,261	15,000	52,261
300 Property Fixed Asset	0	0	0	0	55,771	55,771
Leasehold Improvements	0	0	0	0	0	0
Depreciation Equipment	0	0	0	0	0	0
Agency Overhead	114,828	110,923	225,750	99,125	162,676	261,800
<b>TOTAL ADMINISTRATION COSTS:</b>	<b>257,916</b>	<b>522,184</b>	<b>780,099</b>	<b>219,342</b>	<b>755,750</b>	<b>975,092</b>
<b>TOTAL EXPENDITURES</b>	<b>833,747</b>	<b>1,255,024</b>	<b>2,088,771</b>	<b>719,405</b>	<b>1,521,146</b>	<b>2,240,551</b>
<b>TOTAL REVENUES</b>	<b>833,747</b>	<b>1,255,024</b>	<b>2,088,771</b>	<b>719,405</b>	<b>1,521,147</b>	<b>2,240,552</b>
<b>NET GAIN (LOSS)</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>	<b>0</b>	<b>0</b>	<b>0</b>



COMMUNITY BRIDGES - LIFT LINE / CTSA  
TDA 2021-22 BUDGET

EXHIBIT A, Page 2 of 2

ACCOUNT TITLE	TDA/STA 2021-22 BUDGET	Non-TDA 2021-22 BUDGET	CTSA 2021-22 BUDGET	TDA 2020-21 BUDGET	Non-TDA 2020-21 BUDGET	CTSA 2020-21 BUDGET
<b>REVENUE:</b>						
TDA	733,747	0	\$733,747	619,405	0	619,405
STA	100,000	0	100,000	100,000	0	100,000
City of Capitola		0	0		5,900	5,900
City of Scotts Valley		0	0		0	0
City of Watsonville		0	0		3,500	3,500
County of Santa Cruz		15,000	15,000		15,000	15,000
County of SC-Measure D Sales Tax		875,159	875,159		808,750	808,750
Transfer From Measure D Reserve		0	0		0	0
Area Agency on Aging-Title IIIB		38,043	38,043		38,043	38,043
FTA Section 5310-Traditional		0	0		197,554	197,554
FTA Section 5310-Expanded		0	0		122,446	122,446
Monterey Peninsula Foundation		40,000	40,000		40,000	40,000
Sunlight Giving Fdn		0	0		0	0
Outside Contracts-Other		0	0		0	0
Scrip - Client Payments		8,426	8,426		8,426	8,426
MOW Intra-Program Charges		22,500	22,500		22,500	22,500
Elderday Intra-Program Charges		236,304	236,304		0	0
Donations		2,208	2,208		4,166	4,166
Program Income-Other		2,227	2,227		14,664	14,664
Vehicle Maintenance Intra-Program Charges		12,157	12,157		12,666	12,666
PPP Loan Forgiveness		0	0		224,532	224,532
Vehicle Sales		3,000	3,000		3,000	3,000
<b>TOTAL REVENUES</b>	<b>833,747</b>	<b>1,255,024</b>	<b>2,088,771</b>	<b>719,405</b>	<b>1,521,147</b>	<b>2,240,552</b>

OPERATING FUND SOURCES	CTSA FINAL FY 19-20	CTSA BUDGET FY 20-21	CTSA BUDGET FY 21-22
TDA	800,055	619,405	733,747
STA	100,000	100,000	100,000
City of Capitola	31,200	5,900	0
City of Scotts Valley	3,245	0	0
City of Watsonville	3,500	3,500	0
County of Santa Cruz	15,000	15,000	15,000
County of SC-Measure D Sales Tax	808,862	808,750	875,159
Transfer From Measure D Reserve	120,640	0	0
Area Agency on Aging-Title IIIB	38,124	38,043	38,043
FTA Section 5310-Expanded	112,778	122,446	0
Monterey Peninsula Foundation	40,000	40,000	40,000
Sunlight Giving Fdn	23,438	0	0
Medi-Cal (Central Coast Alliance for Health)	61	0	0
Outside Contracts-Other	14,088	0	0
Scrip - Client Payments	5,607	8,426	8,426
Scrip - Health Project Center	0	0	0
MOW Intra-Program Charges	45,000	22,500	22,500
Elderday Intra-Program Charges	232,554	0	236,304
Donations	5,799	4,166	2,208
Vehicle Maintenance Intra-Program Charges	12,157	12,666	12,157
Vehicle Sales	3,000	3,000	3,000
PPP Loan Forgiveness	228,118	224,532	0
Misc Income	11,750	14,664	2,227
<b>SUBTOTAL REVENUES</b>	<b>2,654,976</b>	<b>2,042,998</b>	<b>2,088,771</b>
SECTION 5310 - PASS THRU	384,541	197,554	0
<b>TOTAL REVENUES</b>	<b>3,039,517</b>	<b>2,240,552</b>	<b>2,088,771</b>



## EXHIBIT B

### CTSA FIVE YEAR CAPITAL IMPROVEMENT PLAN 21/22 FISCAL YEARS: 21/22 THROUGH 25/26

CAPITAL REVENUE					
	Projected 2021-2022	Projected 2022-2023	Projected 2023-2024	Projected 2024-2025	Projected 2025-2026
Fund Balance	\$0	\$0	\$0	\$0	\$0
FTA Section 5310			\$210,000		\$210,000
Addition to Fund	\$43,542			\$0	\$0
Fund Interest	\$0	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$43,542</b>	<b>\$0</b>	<b>\$210,000</b>	<b>\$0</b>	<b>\$210,000</b>
CAPITAL EXPENDITURES					
	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026
Equipment Purchase	\$43,542	\$0	\$210,000	0	\$0
Major Maintenance	\$0	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$43,542</b>	<b>\$0</b>	<b>\$210,000</b>	<b>\$0</b>	<b>\$0</b>
<b>Year-End Balance</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$210,000</b>

**Notes:**

- 1 As capital grants are indefinite, and as capital equipment arrival dates vary, projected figures may require adjustment.
- 2 In FY 2021-2022 Lift Line is paying \$43,542 from TDA fund balance, a second payment for the Ecolane transit scheduling software. The purchase of the solutions including the implementation of the software, hardware, and training is a capitalized purchase over a time-frame of 3 fiscal years.
- 3 Lift Line is applying for \$210,000 in equipment funding for vehicle and computer purchase in FY 2023 - 2024.



**EXHIBIT C-1**  
**Lift Line / CTSA**  
**FY21/22 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. Lift Line does not charge riders a fare for the service.

Lift Line office hours are 9:00 am to 5:00 pm M-F. Paratransit services are provided seven days a week (except on Holidays) from 8:00 am -4:00 pm, with the first pick up scheduled for 8:30 am and the last return scheduled at 3:30 pm. Lift Line also coordinates high-priority medical appointments outside of regular operating hours.

The priority population for this service are those residing outside the METRO ParaCruz service area, cannot afford the METRO ParaCruz fare, do not meet the ADA complementary paratransit eligibility requirements, need same day service, and that requires a higher level of service than not provided through METRO ParaCruz. Lift Line operates a fleet of 24 wheelchair accessible buses and minivans. Lift Line transports to destinations such as doctors' offices, pharmacies, out of county medical destinations, dialysis sites, various medical therapy appointments, social service programs, and essential services such as grocery stores and pharmacies. Under a COVID-free environment, transportation is also provided to Elderday Adult Day Health Care and Meals on Wheels dining sites. Clients are encouraged to book their medical rides between 8:30 am and 3:30 pm.

**Lift Line is seeking to continue TDA Medical Rides service and ensure this service reaches those with the most need. Lift Line projecting 6,000 TDA Medical Rides for FY 21/22.** 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 at a minimum of one day in advance, with no fares collected. All of the residents who 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 participants maintain income and disability eligibility. Recently on February 9, 2021, we added vaccinations as a priority trip.

**Lift Line also coordinates with the local taxi companies to offer the Taxi Scrip (TS) program. Lift Line is projecting 1,432 Taxi Scrip rides in FY 21/22.** 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. Courtesy Cab owns and operates vehicles that are fully accessible for mobility devices such as wheelchairs. Santa Cruz Cab no longer operates a wheelchair-accessible vehicle and directs any client needing accessible transport to Courtesy Cab. Taxi service providers in the area include Courtesy Cab and Santa Cruz Cab.

Currently, all residents that receive Taxi Scrip at a discount are low income and below the 200% federal poverty level. Lift Line staff continue to update the TDA applications to reflect the new Federal Government poverty level guidelines. Lift Line provides ongoing monitoring and



assessment of the program to ensure that eligibility criteria are met, subcontractors meet safety criteria, and to ensure there is no abuse of this vital program. Additionally, clients can purchase three \$10.00 books, for a total of \$30.00 worth of scripts, for \$8.00, which would give them approximately one (1) or two (2) rides per book. However, due to reducing ridership over the last two fiscal years, Lift Line has temporarily lifted the cap on how much scripts can be purchased to get ridership back to the units of service we had for FY18/19 (2,500 ride). Lift Line keeps a ledger of how many scripts a client purchases to ensure purchasing does not become excesses. Clients were previously limit to six books per person per quarter.

**Lift Line is projecting 6,185 Meals on Wheels rides for FY 21/22, 3,110 of which will be funded with TDA funds.** Due to COVID-19 restrictions on in-person services the four congregate meal sites closed in March of 2020 and continue to be closed as of writing.

To continue to support the Meals on Wheels program participants that were transported by Lift Line, we began to deliver meals directly to the client's homes. Lift Line considers one home one unit of service even though we are delivering an average of five meals per home. This service takes a little longer then providing transportation to the four congregate sites. Lift Line will continue to coordinate with the Meals on Wheels to help with the programs increase in demand for home-delivered meals, and will adapt to any changes they may need. When the congregate sites reopen Lift Line will resume to former operations, which is transporting the clients to the congregate meal sites. At this point we do not know when that will happen.

**Lift Line is projecting 16,193 Elderday rides in FY 21/22, of which 6,275 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 or minivans with ramps. 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. Due to COVID-19 impacts Elderday has projected it participation will be at 75% capacity in FY21/22, the overall units of service and TDA allocations reflect this decrease.

**Essential Service Transportation.** Due to COVID-19 impact on senior's ability to independently and safely access food and personal needs, Lift Line launched essential service transportation in March 2020. This new service provides much needed essential transportation to grocery stores, pharmacies, and banks. We also offer the option to pick up groceries and prescriptions for clients without them needing to take the ride on Lift Line and deliver to their door. Theses service are included as part of the increase to the units of service under TDA Medical rides above.

**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. For those who don't qualify for METRO ParaCruz or Medi-Cal 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 CTSA, Lift Line will continue to work 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. 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  
2021 /2022**

TABLE 1 - TDA/STA PROPOSED SERVICE UNITS							
	TAXI SCRIP	MEDICAL TDA	MEALS ON WHEELS	ELDERDAY	STA FUNDING	TOTAL UNITS	TOTAL
FUNDS ALLOCATED	\$36,947	\$427,290	\$76,403	\$149,564	\$100,000	18,243	\$790,205
OPERATING COST	\$15.69	\$43.13	\$13.46	\$12.98	\$42.31		
A. PROGRAM MANAGEMENT i.e., Mgmt Personnel: Director, Fleet Mgr, Admin Asst, Info Mgr, Rent, Liability Insur., Phone, Supplies, etc.	\$6.23	\$19.89	\$9.53	\$7.38	\$18.13		
B. ADMINISTRATION 14.5314% of total cost per unit.	\$3.72	\$8.19	\$1.58	\$3.46	\$10.28		
TOTAL COST PER SERVICE UNIT	\$25.64	\$71.22	\$24.57	\$23.82	\$70.72		
21/22 PROJECTED TDA/STA UNITS OF SERVICE	1,441	6,000	3,110	6,278	1,414	18,243	
EQUIPMENT PURCHASE MATCH							\$43,542
TOTAL TDA/STA CLAIM REQUEST							\$833,747



NON-TDA SUPPORTED

TABLE 2 - OTHER CTSA SERVICE UNITS						
	Meals on Wheels	Elderday Services	Measure D Paratransit	Dialysis	Total Units	Total
Funds Allocated	\$75,543	\$236,304	\$389,206	\$0		\$701,053
Revenue per Service Unit	\$24.57	\$23.82	\$81.08	\$0.00		
<b>21/22 Projected Units of Service</b>	<b>3,075</b>	<b>9,919</b>	<b>4,800</b>	<b>0</b>	<b>17,794</b>	
Other Income						\$68,018
<b>Total Operating Income</b>						<b>\$769,071</b>
Measure D Facility/Equip/Project Funds						\$485,953
FTA Section 5310-Capital Equipment						\$0
TDA/ STA Claim						\$833,747
<b>Grand Total</b>						<b>\$2,088,771</b>

\$0

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	Measure D Paratransit	Dialysis	Total Units
<b>21/22 Total Ride Projections</b>	<b>1,441</b>	<b>6,000</b>	<b>6,185</b>	<b>16,197</b>	<b>4,800</b>	<b>0</b>	<b>34,623</b>



**Exhibit D**  
**Schedule of Payment**  
**FY: 2021-2022 TDA and STA**  
**Claim Lift Line CTSA**

<b>TDA</b>	
July 15, 2021	\$242,136.67
October 15, 2021	\$163,870.11
January 15, 2022	\$163,870.11
April 15, 2022	\$163,870.11
<b>Total</b>	<b>\$733,747.00</b>

<b>STA</b>	
1st Quarter	\$25,000
2 <sup>nd</sup> Quarter	\$25,000
3 <sup>rd</sup> Quarter	\$25,000
4 <sup>th</sup> Quarter	\$25,000
<b>Total</b>	<b>\$100,000</b>

Preferred Method and Schedule for TDA fund distribution: Quarterly disbursement, with up to 33% in first quarter, and the remaining quarterly payments being one-third of the remaining claim amount.



**EXHIBIT E Lift Line / CTSA**  
**21/22 Statement of Role and Responsibility**

Community Bridges has been the designated Consolidated Transportation Services Agency (CTSA) since 1982. CTSAs are authorized under California Government Code Sections 15975 and 15950-15952, which were enacted under the Social Service Transportation Improvement

Act. The CTSA aims to improve transportation required by social service recipients by promoting the consolidation and coordinating of social service transportation. As the CTSA, Lift Line will continue coordinating and consolidating transportation services with other transit and human service agencies to provide the most efficient transportation possible. Lift Line will continue to work with, Human Services Department of the County of Santa Cruz, County Office of Education, Veterans Service Offices in Santa Cruz and Palo Alto, hospitals, and other medical facilities. Lift Line will also continue to work closely with the RTPA to help with the unmet needs identified in the Tri-County AMBAG Coordinated Plan. Lift Line will also continue working with local non-profit organizations and medical facilities in neighboring counties to identify needs for residents with various disabilities, low income, and senior populations. The goal is to increase transportation access to travel easily throughout our county and travel throughout our tri-county Monterey Bay region and the San Francisco Bay Area.

As the CTSA, Lift Line will continue coordination to improve and identify the need for specialized transportation equipment. If the equipment funded through Caltrans 5310 is not 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 safely and sensitively.

Pursuant to the CTSA designation for Santa Cruz County, Community Bridges operates the Lift Line transportation program, which will continue to take the 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: 2021-2022 TDA Claim**  
**Community Bridges' Lift Line CTSA**

	<b>Reporting Period</b>	<b>Due</b>
<b>1.</b>	Fiscal Year: 2020/21	11/15/21
<b>2.</b>	1 <sup>st</sup> Quarter, 7/1/21 through 9/30/21	01/15/22
<b>3.</b>	2 <sup>nd</sup> Quarter, 10/1/21 through 12/31/21	04/15/22
<b>4.</b>	3 <sup>rd</sup> Quarter, 1/1/22 through 3/31/22	07/15/22
<b>5.</b>	4 <sup>th</sup> Quarter, 4/1/22 through 6/30/22	11/15/22
<b>6.</b>	Annual Evaluation, Fiscal Year 2021/2022	11/15/22

**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.





Agency Board Resolution  
**RESOLUTION # 2021-03-01**

RESOLUTION AUTHORIZING COMMUNITY BRIDGES/LIFT LINE TO MAKE A CLAIM FOR FY21/22 TDA FUNDS FROM THE REGIONAL TRANSPORTATION COMMISSION THROUGH THE CITY OF SANTA CRUZ

**WHEREAS**, the Transportation Development Act (TDA) of 1971 provides that the applicant may file an Article 8 claim for monies from the Local Transportation Fund; and

**WHEREAS**, the Regional Transportation Commission (RTC) has identified a process for TDA claims in their Rules and Regulations; and

**WHEREAS**, Community Bridges desires to apply for said financial assistance to permit operation of paratransit service in Santa Cruz County; and

**WHEREAS**, the Community Bridges has, to the maximum extent feasible, coordinated with other transportation providers and users in the region (including social service agencies).

**NOW, THEREFORE, BE IT RESOLVED AND ORDERED** that the Community Bridges does hereby authorize Raymon Cancino, CEO, to file and execute applications on behalf of Community Bridges with the Department to aid in the financing of capital projects pursuant to TDA claim, as amended.

That **Raymon Cancino, CEO; Seth McGibben, CAO; Doug Underhill, CFO** is authorized to execute and file all certification of assurances, contracts or agreements or any other document required by the Department.

That **Raymon Cancino, CEO; Seth McGibben, CAO; Doug Underhill, CFO** is authorized to provide additional information as the RTC may require in connection with the application for the TDA claim.

That **Raymon Cancino, CEO; Seth McGibben, CAO; Doug Underhill, CFO** is authorized to submit and approve request for reimbursement of funds from the RTC for the TDA claim.

**PASSED AND ADOPTED** by **Community Bridges Board of Directors** of the *Santa Cruz County*, State of California, at a regular meeting of said Commission or Board Meeting held on 3/17/2021 the by the following vote:

AYES:   9   NOES:   0   ABSENT:   1  

Nicolette Lee, Chair

Jack Jacobson, Secretary

**OUR FAMILY OF  
PROGRAMS**

Elderday • Lift Line • Meals on Wheels for Santa Cruz County • La Manzana Community Resources  
Live Oak Community Resources • Mountain Community Resources • Nueva Vista Community Resources  
Child & Adult Care Food Program • Child Development Division • Women, Infants and Children (WIC)



**AGENDA:** April 13, 2021

**TO:** Elderly & Disabled Transportation Advisory Committee

**FROM:** Amanda Marino, Transportation Planner

**RE:** FY 2021-22 Transportation Development Act Funds for Volunteer Center

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## **RECOMMENDATION**

Staff recommends that the Elderly & Disabled Transportation Advisory Committee review the FY 2021-22 claim from the Volunteer Center in the amount of \$87,351, and recommend approval by the Regional Transportation Commission, contingent upon approval by the City of Santa Cruz to act as their claimant.

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## **BACKGROUND**

The Regional Transportation Commission (RTC) allocates Transportation Development Act (TDA) funds from the region's ¼ cent share of the state's 7.25 cent sales tax according to state law and established formulas in the Commission's Rules and Regulations. The RTC's FY 2021-22 budget was adopted by the RTC on April 1, 2021 and includes estimated TDA allocations based on the Santa Cruz County Auditor's estimates.

## **DISCUSSION**

The Regional Transportation Commission (RTC) FY 2021-22 budget includes Transportation Development Act (TDA) apportionments for the Volunteer Center in the amount of \$87,351, consistent with the percentages set forth in the RTC's Rules and Regulations. 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 serve approximately 150 seniors with the new Grocery Shopper Program. The new program began in FY 2020-21 in response to needs associated with COVID-19 impacts and continues to serve the same specialized transportation population served by the Volunteer Center's Transportation Program. To meet the needs of their most vulnerable seniors in the community, the Volunteer Center developed the Grocery Shopper Program as a fully vetted volunteer program to provide food, grocery and medication pickup services to the most at-risk group of the COVID-19 virus. They will receive grocery requests from participants and will attempt to purchase and deliver (using approved social-distancing guidelines) those grocery items and pharmacy medications to the individual. The goal is to serve low-income seniors age 60+ and older adults that



are health compromised. These services are provided at no cost to the participants, and community volunteers use their own vehicles to grocery shop and pick up medications for seniors. This 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.

The Volunteer Center will also use TDA funds to resume their regular Transportation Program in May 2021 providing volunteer ride service to medical appointments and shopping trips.

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 review the TDA claim for the Volunteer Center, and recommend approval by the Regional Transportation Commission, contingent upon approval by the City of Santa Cruz to act as the claimant.**

## **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 2021-22 Volunteer Center TDA Claim and operation/budget pages

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**Attachment 1**



April 5, 2021

Guy Preston  
Executive Director  
Santa Cruz County RTC  
1523 Pacific Ave.  
Santa Cruz, CA 95060-3911

Dear Mr. Preston,

I am submitting a TDA funding claim on behalf of the Volunteer Center of Santa Cruz County. One year ago, in response to COVID 19 we redesigned and developed new safety guidelines and implemented and scaled our current Transportation Program to include a Grocery Shopping Program. In May 2021 we will return to driving seniors to medical appointments and also continue to support seniors already enrolled in our Grocery Shopper Program by picking up and delivering groceries and medications to their door.

We are honored to be a part of the Regional Transportation E&D TAC commission and serve as one of the agencies of specialized transportation services for seniors and people with disabilities in Santa Cruz County.

I attest to the accuracy of the claim and all of its accompanying documentation. If you have any question or concern please feel free to contact me directly at 831.427.5070.

Warm Regards,  
*Tara E. Ireland*

Tara Ireland  
Senior Programs Director  
Volunteer Center of Santa Cruz County  
rsvpvol@scvolunteercenter.org  
831.427.5070 x105





Exhibit C

April 5, 2021

Ms. Natalia Duarte  
Finance Department  
809 Center Street Room 8  
Santa Cruz, CA 95060

Dear Ms. Duarte,

This letter serves as our request that the City of Santa Cruz act as the Transportation Development Act (TDA) claimant for the Volunteer Center of Santa Cruz Transportation Program through the Santa Cruz County Regional Transportation Commission.

Our agency remains committed to serving the senior and disabled population of Santa Cruz County. In response to COVID 19 our Transportation Program has designed and developed a Senior Grocery Shopping Program in order to keep vulnerable seniors safe and able to shelter in place.

I have enclosed a copy of our Program Responsibilities and Budget for fiscal year 2021-22.

Thank you for your continued support of the Volunteer Center Transportation Program.

Warm Regards,

*Tara E. Ireland*

Tara Ireland  
Senior Programs Director  
Volunteer Center of Santa Cruz County

Enclosure

CC: Amanda Marino, Regional Transportation Commission



## Transportation Development Act (TDA) 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: Volunteer Center Transportation and Grocery Shopper Program
2. Implementing Agency: Volunteer Center of Santa Cruz County
3. Sponsoring Agency (if different) – must be a TDA Eligible Claimant:

STA (transit only) \$ \_\_\_\_\_

4. Funding requested this claim: TDA– Local Transportation Funds (LTF) \$87,351

5. Fiscal Year (FY) for which funds are claimed: FY21/22

6. 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 8 Specialized Transportation

☐ Article 4 Public Transportation

☐ Article 3 & 8 TDA Admin or Planning

7. Contact Person/Project Manager

Name: Tara Ireland

Telephone Number: 831-427-5070 x105

Email: rsvpvol@scvolunteercenter.org

Secondary Contact (in event primary not available) :Alicia Dayton

Telephone Number: 831-427-5070

Email: contracts@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: Exhibit A

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

Santa Cruz County, including rural and isolated areas that may not be accessible via van or bus.

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) In March of 2020 the Transportation Program designed and developed the Grocery Shopper Program in response to COVID 19 so that we could meet the food and medication needs of seniors in Santa Cruz County. There continues to be a need for this service as some seniors face health conditions and physical limitations that make it difficult to shop for themselves. We have decided to continue to run the Grocery Shopper Program and also reopen our regular Transportation Program in May 2021. We will reopen our volunteer ride service to medical appointments and some shopping trips as we continue to assess the needs of our senior and disabled community members.

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.): An increase in the number of senior clients using our GSP and Transportation Program will be a measure of performance. Additionally, our program will measure performance as 1,000 rides per quarter. Success will be measured by client satisfaction surveys conducted two times per year.



- 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): 150 seniors will be served
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 had a consistent relationship with the RTC for over 35 years. Our program is listed in the RTP and is consistent with specific RTP goals and policies.
13. Impact(s) of project on other modes of travel, if any (ex. parking to be removed): There are no anticipated negative impacts of projects 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 or other performance standard. 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. In lieu of a 10% match performance standard, the Volunteer Center performance standard is to provide 4,000 rides per year.*
- What is the total project cost? \$87,513
- Is project fully funded? Yes
- What will TDA (and STA) funds be used on (ex. administration, brochures, engineering, construction)?
- a. Bike/Ped: ☐ Up to 90% upon initiation of work OR ☐ 100% upon project completion
15. Preferred Method and Schedule for TDA fund distribution *(see RTC Rules and Regulations for details):*
- 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 _____ (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: <a href="http://www.dot.ca.gov">http://www.dot.ca.gov</a> ).	NA
F. For Article 4 transit claims: Does operator meet Article 4 eligibility requirements? i. Farebox recovery ratio? and/or, ii. 50 percent expenditure rule as an older operator, defined as service starting prior to 1974?	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 customized computer application has increased both program efficiency and productivity over the last year by allowing us to quickly match volunteers with clients based on location and availability. Additionally, we invested heavily in marketing to increase the number of program participants.

- 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 goals for next year are to offer our Transportation Program along side our Grocery Shopper Program and continue to grow both programs.

18. What is different from last year's program/claim? Yes, last year we developed the GSP program and only gave a limited number of rides due to COVID 19

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

- ☐ SCMD – April each year
- ☒ Specialized Transportation: Quarterly<sup>1</sup> to E/D TAC, RTC \_\_\_\_\_ (Months/Year)
- ☐ 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. Yes, our free, volunteer service provides personalized service to frail seniors. Some need to be escorted door to door and others live in remote areas of Santa Cruz County that vans and buses cannot get to.
21. Where appropriate, are these specialized transportation services coordinated with other transportation services, including METRO service? Describe. Yes, we make every effort to refer individuals to both Lifeline and METRO when we cannot meet the need or when other transportation methods are a better match for the individual.
22. Provide performance information, as pertinent, which demonstrate service efficiency and effectiveness, 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). (99246d, per Performance Audits)

a. *Volunteer Center, only:*

- ☒ provide a minimum 4,000 rides per year

23. Discuss the needs and types of the passengers being served, 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) Our aim is to serve seniors age 60+, disabled adults and health compromised individuals.

**SCMTD, CTSC, Volunteer Center & RTC Only**

24. 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. In our 2019 audit it was recommended that we come up with an alternate measure of service efficiency in lieu of a 10% local match. RTC and VC staff came up with a 1,000 minimum number of rides per quarter which we are implementing.

**SCMTD Only**

25. TDA Article 4 Eligibility Compliance – *Provide documentation for 50% expenditure limitation (PUC Section 99268.1).* 50 percent expenditure limitation (use if LTF remains below 50 percent of its operating costs):
- Overall operating cost for fiscal year: \$ \_\_\_\_\_
  - TDA-LTF claim: \$ \_\_\_\_\_
  - Source of information (e.g. audited financial statements, budget, etc):

<sup>1</sup> If feasible, the quarterly TDA reports submitted by Community Bridges for Lift Line should include on-time performance of the service. Vehicle on-time arrival to pick up a passenger at the scheduled time is an important measure of operational effectiveness and customer service.



<b>Funds</b>	<b>Urbanized Service</b>	<b>Rural/Non-Urban Service</b> (could use FTA 5311 application)
Fare Revenue:	\$	\$
Local Support Revenues:	\$	\$
Operation costs:	\$	\$
Ratio Fare Rev ÷ Op Cost: (minimum required=15% per PUC Sec.6645)	_____%	_____%
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.*
- *As set forth in Section 99268.2, ratio must be at least equal to one-fifth if serving an urbanized area or one-tenth if serving a non-urbanized area. If a ratio of the sum of fare revenues and local support to operating cost greater than one-fifth if serving an urbanized area, or one-tenth if serving a non-urbanized area, during the 1978 -79 fiscal year shall, at least, maintain that ratio in order to be eligible for additional funds pursuant to this section.*
- *Additional exclusions in calculating urban/rural farebox recovery: operating costs above the consumer price index for fuel, alternative fuel programs, power, insurance premiums and payments in settlement of claims, and state and federal mandates.*

26. 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).*

27. 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

### **Definitions:**

- "Operating cost" means all costs in the operating expense object classes exclusive of the costs in the depreciation and amortization expense object class of the uniform system of accounts and records adopted by the Controller pursuant to Section 99243. "Operating cost" excludes all subsidies for commuter rail services operated on railroad lines under the jurisdiction of the Federal Railroad Administration, all direct costs for providing charter services, all vehicles lease costs, and principal and interest payments on capital projects funded with certificates of participation.
- "Operating cost per passenger," means the operating cost divided by the total passengers.
- "Operating cost per vehicle service hour," means the operating cost divided by the vehicle service hours.
- "Passengers per vehicle service hour" means the total passengers divided by the vehicle service hours.
- "Passengers per vehicle service mile" means the total passengers divided by the vehicle service miles.
- "Total passengers" means the number of boarding passengers, whether revenue producing or not, carried by the public transportation system.
- "Transit vehicle" means a vehicle, including, but not limited to, one operated on rails or tracks, which is used for public transportation services funded, in whole or in part, under this chapter.
- "Vehicle service hours" means the total number of hours that each transit vehicle is in revenue service, including layover time.
- "Vehicle service miles" means the total number of miles that each transit vehicle is in revenue service.
- "Vehicle service hours per employee" means the vehicle service hours divided by the number of employees employed in connection with the public transportation system, based on the assumption that 2,000 person-hours of work in one year constitute one employee. The count of employees shall also include those individuals employed by the operator, which provide services to the agency of the operator responsible for the operation of the public transportation system even though not employed in that agency.

### **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)
- ☐ TDA Standard Assurances Checklist

### ***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 E. Ireland Title: Senior Programs Director Date: 4/2/2021



*Other Certifications- 1 & 2 from below, 10 & 11 and 15.*



## TDA Standard Assurances Checklist

**Claimant:** Volunteer Center of Santa Cruz County

**Fiscal Year:** 21\_22

Assurance	Initial
<b>1. CERTIFIED FISCAL AUDIT (All Claimants)</b> Claimant certifies that it has submitted a satisfactory, independent fiscal audit, with the required certification statement, to (RTPA name) and to the State Controller's Office, pursuant to PUC 99245 and CCR 6664 for the prior fiscal year (project year minus two). Claimant assures that this audit requirement will be completed for the current fiscal year (project year minus one). <i>This requirement does not apply to new operators.</i>	TEI
<b>2. STATE CONTROLLER REPORT (All Claimants)</b> Claimant certifies that it has submitted a State Controller's report in conformance with the uniform system of accounts and reports, to (RTPA name) and to the State Controller, pursuant to PUC 99243, for the prior year (project year minus two). Claimant assures that this report will be completed for the current fiscal year (project year minus one). <i>This requirement does not apply to new operators.</i>	TEI
<b>3. PART-TIME EMPLOYEES (STAFF ONLY) (STA Claimants Only)</b> Claimant certifies that it is not precluded, by any contract, from employing part-time drivers or contracting with common carriers of persons operating under a franchise or license.	
<b>4. REVENUE RATIOS FOR COMMUNITY TRANSIT AND CONTRACTED TRANSIT SERVICES (CTSA &amp; Volunteer Center Only)</b> Claimant filing a claim pursuant to PUC 99275.5c and 99405c further certifies that, for the project year, it reasonably anticipates achieving the performance criteria, local match requirements, or fare recovery ratios adopted by the transportation planning agency or county transportation commission.	TEI
<b>5. REVENUE RATIOS FOR OPERATORS SERVING URBANIZED AND NONURBANIZED AREAS (METRO Only)</b> Claimant filing a claim pursuant to PUC 99270.1 certifies that it will maintain for the project year at least the alternative farebox recovery ratio as determined by the adopted (RTPA name) "fare ratio optional rule."	
<b>6. EXTENSION OF SERVICES (METRO Only)</b> Claimant that received an allocation of LTF funds for an extension of service pursuant to PUC 99268.8 certifies that it will file a report of these services pursuant to CCR 6633.8b within 90 days after the close of the fiscal year in which that allocation was granted.	
<b>7. RETIREMENT SYSTEM (METRO Only)</b> Claimant filing claim pursuant to PUC Section 99260 certifies that (check one):	
a) The current cost of its retirement system is fully funded with respect to the officers and employees of its public transportation system (PUC Section 99271a); or	
b) The operator is implementing a plan approved by the transportation planning agency which will fully fund the retirement system for such officers and employees within 40 years (PUC Section 99271a); or	
c) The operator has a private pension plan which sets aside and invests on a current basis funds sufficient to provide for the payment of future pension benefits and which is fully compliant with the requirements stated in PUC Sections 99272 and 99273.	
<b>8. USE OF FEDERAL FUNDS (Claimants Receiving Federal Funds)</b> Claimant filing a claim for TDA funds for capital intensive projects pursuant to PUC 99268.7 certifies that it has made every effort to obtain federal funding for any project which is funded pursuant to PUC 99268.7.	TEI
<b>9. REDUCED FARES FOR ELDERLY AND HANDICAPPED (METRO Only)</b> A claimant filing a claim pursuant to PUC 99260 which offers reduced fares to senior citizens and disabled persons certifies that it is in compliance with PUC 99155.	



<p><b>10. DRIVERS PULL NOTICE PARTICIPATION (METRO &amp; Community Bridges Only)</b>  A claimant filing a claim for public transit assistance must include a certification completed within the prior 13 months by the California Highway Patrol indicating the operator has participated in a "pull notice system" to examine driver's records.</p>	
<p><b>11. INCREASE IN OPERATOR'S COST PER HOUR (STA Claimants Only)</b>  Claimant filing a claim for operating assistance from STAF funds must include a supplemental schedule which identifies either: A - 1) the most recent audited cost per revenue vehicle hour (year 1) and the cost per revenue hour for the year prior to the most recent audit year (year 2) and 2) the Consumer Price Index for the year prior to the most recent audit year (year 2); or B - 1) the most recent audited cost per revenue vehicle hour (year 1) and the cost per revenue hour for the three years prior to the most recent audit year and 2) the Consumer Price Index for the three years prior to the most recent audit year. The supplemental schedule information will be used to determine eligibility pursuant to PUC 99314.6.</p>	
<p><b>12. STAFFING ON VEHICLES (METRO &amp; Community Bridges Only)</b>  Claimant certifies that it is in compliance with PUC Section 99264 that it does not routinely staff, with two or more persons, a vehicle for public transportation purposes designed to be operated by one person.</p>	

Volunteer Center of Santa Cruz County

(Legal Name of Applicant/Claimant)

***Karen Delaney***

(Authorizing Signature of CEO/CFO)

Karen Delaney

(Name and Title)



**Exhibit A**  
**VOLUNTEER CENTER OF SANTA CRUZ COUNTY**  
1740 17<sup>th</sup> Avenue Santa Cruz, CA 95062 427-5070

PROGRAM DESCRIPTION/SCOPE OF WORK  
VOLUNTEER CENTER'S TRANSPORTATION  
PROGRAM Fiscal Year 2021-22

**A. TARGET POPULATION**

Our target population is seniors age 60+ and older adults that are health compromised.

**B. SERVICE GOALS**

Our goal is to provide 4,000 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	Shopping trips for low-income persons
2nd Priority	Shopping for other persons
3rd Priority	Medical trips for other persons
4th Priority	Medical for other persons
5th Priority	Other eligible destinations

These trips will be targeted for geographic distribution as follows:

		% of Rides	#Clients
Santa Cruz/Mid-County/Aptos/Capitola	2400	60%	100
San Lorenzo/Scotts Valley	600	15%	15
Watsonville/ Freedom	1000	25%	20

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 volunteers Monday- Friday 10:00 a.m. to 2:00 p.m.
2. When possible, the Volunteer Center will refer those callers whose requests cannot be accommodated through our program to other programs such as Lifeline and Metro.
3. The Volunteer Center will continue its intensive campaign to recruit new drivers and GSP volunteers



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 6, 2021
Quarterly Activities Report 1:	October 25, 2021
Quarterly Activities Report 2:	February 8, 2022
Quarterly Activities Report 3:	April 26, 2022
Quarterly Activities Report 4:	July 26, 2022

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

1. Number of rides/deliveries 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, 2021 \$87,351



**Exhibit B**

PROGRAM NAME:

Volunteer Center/ Transportation

FISCAL YEAR:

2021-2022      2020-2021

**REVENUES**

Budget Unit Name		Transp/GSP	Transp/GSP
Budget Unit Number		05	05
4000	PUBLIC SUPPORT   Donations	1,000	
	4008 Unallocated Funds		7,151
	4295 Transportation Commission	87,351	89,226
<b>TOTAL CURRENT YEAR REVENUES</b>		<b>88,351</b>	<b>96,377</b>
	5001 Hourly Wages	62,682	63,503
	<b>SUBTOTAL BENEFITS &amp; TAXES</b>	<b>62,682</b>	<b>63,503</b>
	6012 Auditing Expense	500	500
	6018 Copies	300	300
	6032 Equipment	500	1,600
	6151 Background Checks	550	550
	6039 Facility Maintenance	200	200
	6040 Insurance, General	600	600
	6042 Insurance, Volunteer	1,600	1,900
	6050 Postage	400	500
	6009 Recruitment/Marketing	1,500	2,500
	6061 Rent, Watsonville	2,000	3,500
	6078 Office Supplies	500	500
	6081 Computer Software & Fees	600	600
	6098 Mileage, Volunteers	3,000	3,500
	6100 Telecommunication	2,200	3,157
	6125 Utilities	500	575
	6150 Volunteer Recognition	350	400
	6160 Admin Fees	12,369	13,492
<b>TOTAL CURRENT EXPENSES</b>		<b>88,351</b>	<b>96,377</b>



**AGENDA:** April 13, 2021

**TO:** Elderly & Disabled Transportation Advisory Committee

**FROM:** Amanda Marino, Transportation Planner

**RE:** FY 2021-22 Transportation Development Act Funds for the Santa Cruz Metropolitan Transit District

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## **RECOMMENDATION**

Staff recommends that the Elderly & Disabled Transportation Advisory Committee:

1. Review the FY 2021-22 claim for TDA-Local Transportation Fund (TDA-LTF) funds from the Santa Cruz Metropolitan Transit District in the amount of \$7,468,449; and,
  2. Review the FY 2021-22 claim for TDA-State Transit Assistance Funds (TDA-STA) funds from the Santa Cruz Metropolitan Transit District in the amount of \$3,454,690; and,
  3. Review the FY 2021-22 claim for STA-SGR funds in the amount of \$760,266 and recommend approval by the Regional Transportation Commission.
- 

## **BACKGROUND**

The Regional Transportation Commission (RTC) allocates Transportation Development Act (TDA) funds from the region's ¼ cent share of the state's 7.25 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 2021-22 draft budget was considered by the RTC Budget and Administration Personnel Committee (B&A/P) in March 2021 and includes TDA and STA apportionments based on the Santa Cruz County Auditor's and State Controller's Office estimates.

## **DISCUSSION**

### ***Transportation Development Act (TDA)***

The Regional Transportation Commission (RTC) FY 2021-22 budget includes Transportation Development Act (TDA) apportionments for the Santa Cruz Metropolitan Transit District (Metro) in the amount of \$7,468,449. Metro will use FY 2021-22 TDA funding and State Transit Assistance (STA) funding to support Metro's fixed-route public transit operations and ADA complementary paratransit operations which requires 76 vehicles and serves 24 routes throughout Santa Cruz County. Metro projects 3,846,951 fixed-route and ParaCruz passenger trips in FY 2021-22.



ParaCruz is Metro's complementary paratransit service, which operates 32 accessible vans. Metro projects 62,472 trips paratransit one-way trips in FY 2021-22.

### ***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 \$4,314,956 in STA funds are estimated to be available in FY 2021-22 including: \$1,872,621 in RTC's population-based formula funds, \$1,682,069 in METRO's revenue-based formula share, \$400,510 in State of Good Repair (SGR) program funds allocated to RTC and \$359,756 in SGR program funds allocated to METRO.

At its September 5, 2019 meeting, the RTC took action to hold in abeyance for three years the December 2017 RTC policy that would have made some STA and SGR funds available to community transportation projects and services, and instead indicated its intent to allocate \$100,000 per year of the RTC's population shares (PUC 99313) of FY19/20-FY21/22 State Transit Assistance (STA) funds to Community Bridges Lift Line and to allocate the balance of the RTC's FY19/20-FY21/22 shares of State Transit Assistance (STA) and 100% of the region's population shares (PUC 99313) of FY19/20-FY21/22 SB1-Transit State of Good Repair funds to Santa Cruz METRO. As shown in METRO's **draft** TDA/STA claim (Attachment 1), METRO proposes to use FY 2021-22 SGR Capital funds and \$123,411 in STA funds transferred to the capital budget to contribute \$883,677 of \$3,000,000 in capital funding to procure replacement buses for ParaCruz, METRO's complementary paratransit service.

**Staff recommends that the E&D TAC review the FY 2021-22 claim for TDA, STA, and SGR funds from the Santa Cruz Metropolitan Transit District and recommend approval by the Regional Transportation Commission.**

### **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 21-22 Santa Cruz Metro TDA and STA Claim

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## **Attachment 1**

March 29, 2021

Guy Preston, Executive Director  
Santa Cruz County Regional Transportation Commission  
1523 Pacific Avenue  
Santa Cruz, CA 95060

Dear Mr. Preston:

The Santa Cruz Metropolitan Transit District's FY22 Transportation Development Act (TDA) Claim Form is enclosed. METRO is the single fixed-route and ADA-mandated complementary paratransit provider in Santa Cruz County and is responsible for all operations, maintenance and administration, including civil rights compliance, in accordance with federal, state and local requirements. METRO will allocate all of the FY22 TDA-Local Transportation Fund (TDA-LTF) revenue to the operating budget and its FY22 TDA-State Transit Assistance (TDA-STA) revenue to the operating and capital budgets. The respective TDA-LTF and TDA-STA allocations are shown in the Santa Cruz Metropolitan Transit District FY22& FY23 Preliminary Operating Budget and the FY22 Preliminary Capital Budget attached to the Claim form.

Santa Cruz METRO requests a total of \$11,683,405 in TDA-LTF and TDA-STA funds allocated in the Santa Cruz County Regional Transportation Commission's FY22 Work Program and Budget as summarized below:

TDA – LTF FY21 Transit Operations	\$7,468,499
TDA – STA FY21 \$100,000 less of Sec 99313 Operations and Capital	\$1,772,621
TDA – STA FY21 99314 Operations and Capital	\$1 ,682,069
STA-SGR FY21 100% of 99313 Vehicle Replacements	\$400,510
STA-SGR FY21 99314 Vehicle Replacements	\$359,756
Total	\$11,683,405

If TDA funding levels vary from the budgeted amount during FY22, the SCCRTC will revise the TDA allocations to METRO in accordance with an amended FY22 SCCRTC Work Program and will pay METRO the revised amount of TDA funds without further action from METRO.

The FY22 TDA Claim has been prepared with the most recently available budget and system performance data in accordance with the SCCRTC's guidance and Caltrans TDA Statutes. Please call me if you need additional information.

Sincerely,

Alex Clifford  
CEO/General Manager

cc: Maura F. Twomey, AMBAG



**DATE:** March 29, 2021

**TO:** Executive Director, SCCRTC

**FROM:** CEO/General Manager, Santa Cruz METRO

**SUBJECT: FY22 TDA FUNDS DISBURSEMENT REQUIREMENT**

METRO requests disbursement of the Santa Cruz Metropolitan Transit District's FY22 TDA claim for \$7,468,449 in TDA-LTF funds, \$3,454,690 in TDA-STA funds, and \$760,266 in STA-SGR funds as follows:

1. TDA-LTF FUNDING FOR FY22

<u>Disbursement Schedule</u>	<u>Operating Funds</u>	<u>Total Disbursement</u>
First Quarter	\$1,867,112.25	\$1,867,112.25
Second Quarter	\$1,867,112.25	\$1,867,112.25
Third Quarter	\$1,867,112.25	\$1,867,112.25
Fourth Quarter	\$1,867,112.25	\$1,867,112.25
Total	\$7,468,449	\$7,468,449

2. TDA-STA FUNDING FOR FY22 (Sec. \$100,000 less of 99313 and 100% 99314 STA)

<u>Disbursement Schedule</u>	<u>Operating Funds</u>	<u>Capital Funds</u>	<u>Total Disbursement</u>
First Quarter	\$832,819.75	\$30,852.75	\$863,672.50
Second Quarter	\$832,819.75	\$30,852.75	\$863,672.50
Third Quarter	\$832,819.75	\$30,852.75	\$863,672.50
Fourth Quarter	\$832,819.75	\$30,852.75	\$863,672.50
Total	\$3,331,279	\$123,411	\$3,454,690

3. STA-SGR FUNDING FOR FY21 (Sec. 100% of 99313 and 99314 SGR)

<u>SGR Disbursement Schedule</u>	<u>Capital</u>
First Quarter	\$190,066.50
Second Quarter	\$190,066.50
Third Quarter	\$190,066.50
Fourth Quarter	\$190,066.50
Total	\$760,266

FY22 TDA funds will be used for fixed-route and paratransit operating, capital and administrative costs as shown on the FY21 TDA Claim Form and in the *Santa Cruz Metropolitan Transit District FY22 & FY23 Preliminary Operating Budget* and the *FY22 Preliminary Capital Budget*, which the Board approved on 3/26/21. SGR funds will be used for bus replacements.



## Transportation Development Act (TDA) 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: FY22 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: Yes
4. Funding requested this claim:

<b>TDA-LTF (FY22)</b>	\$ 7,468,499
<b>TDA-STA 99313</b>	\$ 1,772,621
<b>TDA-STA 99314</b>	\$ 1,682,069
<b>SGR 99313</b>	\$ 400,510
<b>SGR 99314</b>	\$ 359,756

5. Fiscal Year (FY) for which funds are claimed: FY22
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 type="checkbox"/> Article 8 Specialized Transportation
<input checked="" type="checkbox"/> Article 4 Public Transportation	<input type="checkbox"/> Article 3 & 8 TDA Admin or Planning
7. Contact Person/Project Manager
  - a. Name: Alex Clifford, CEO/General Manager  
Telephone Number: (831) 426-6080. Email: [Aclifford@scmtd.com](mailto:Aclifford@scmtd.com)
  - b. Secondary Contact (in event primary not available): Wondimu Mengistu, Grants/Legislative Analyst  
Telephone Number: (831) 420-2580. Email: [Wmengistu@scmtd.com](mailto:Wmengistu@scmtd.com)
8. Project/Program Description/Scope (use additional pages, if needed, to provide details such as work elements/tasks).

This project provides \$10,799,728 for fixed-route public transit and ADA complementary paratransit operations in Santa Cruz County and \$883,677 for capital improvements. Fixed-route public transit operations require a maximum fleet of 76 buses serving 24 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 32 accessible vans in demand-response service for persons who, due to disability, cannot access the fixed-route system. FY22 SGR Capital funds (\$760,266) and \$123,411 in STA funds transferred to the capital



budget contribute \$883,677 of \$3,000,000 in capital funding to procure replacement buses.

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







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).

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 that are beyond their useful lifespan. The COVID-19 pandemic has significantly increased METRO's transit operating costs and slashed state and local sources of transit funding, including agency farebox, and other revenue; dedicated sales tax, and other state state and local funding. As METRO works to maintain and restore these essential services, these funds are critical to ensuring that public transportation can continue to be a lifeline for our essential workers and help our communities rebuild their economies in the wake of the pandemic. 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. METRO also needs to develop and implement charging infrastructure to support electric bus operations and battery storage to allow METRO to avoid purchasing power from the grid at peak price times.

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.):
  - Total Annual passenger trips
  - Operating Cost/Hour
- 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):

Shelter-in Place directives, carrying capacity restrictions adhering to social distancing protocols, and increased remote learning and teleworking in response to COVID-19 led to major transit demand decline for METRO transit system. For FY22, METRO projects 3,846,951 fixed-route and ParaCruz passenger trips based upon a FY19 actual pre-COVID-19 pandemic ridership reduction by 25% in fixed-route and 15% decrease in ParaCruz passenger trips. The FY22 ParaCruz ridership estimate is 62,472 trips, 0.9% higher than the 61,631 actual trips carried in FY20. The FY22 ParaCruz ridership estimate is based upon current trends to adjust the previous year's actual ridership.

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?

Yes, METRO's FY22 TDA/STA project conforms to these goals and targets in the *2040 RTP, 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 47 percent by 2040 (Attachment 3, p. 1).

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

1E. Increase the number of active transportation trips 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 47% by 2040.

13. 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.
- Improves the transit and active transportation network.
- Increase range of travel for bicycles by accommodating bikes on buses.
- Provide feeder service to intercity bus, rail and airline network at San Jose.

14. Estimated Project Cost/Budget, including other funding sources, and Schedule: *(attach project budget). Specialized Transportation Claims require 10% local match or other performance standard. 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. In lieu of a 10% match performance standard, the Volunteer Center performance standard is to provide 4,000 rides per year.*

METRO will contribute \$11,683,405 in farebox revenue together with sufficient advertising, rental and interest income to meet the 50% match for operating funds.

What is the total project cost?

\$55,857,105 for FY22 operations and \$3,000,000 for capital improvements as published in the *Santa Cruz Metropolitan Transit District FY22 & FY23 Preliminary Operating Budget and FY21 Preliminary Capital Budget*, Attachment A. Revenue sources for capital improvements (replacement buses) are \$123,411 FY22 STA transferred from operating budget; \$760,266 SGR capital; \$2,116,323 FY22 Measure D transferred from operating budget.

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.



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?
<b>A.</b> Has the project/program been approved by the claimant's governing body? Form of approval At its 3/26/21 meeting, METRO's Board adopted the FY22 & FY23 Preliminary Operating Budget for the purpose of submitting the TDA claim in the amounts requested with this claim. (eg resolution, work program, budget, other document) If "NO," provide the approximate date approval is anticipated. _____	Yes
<b>B.</b> Has this project previously received TDA funding?	No
<b>C.</b> 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
<b>D.</b> 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).	N/A
<b>E.</b> 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: <a href="http://www.dot.ca.gov">http://www.dot.ca.gov</a> ).	N/A
<b>F.</b> For Article 4 transit claims: Does operator meet Article 4 eligibility requirements? i. Farebox recovery ratio? and/or, ii. 50 percent expenditure rule as an older operator, defined as service starting prior to 1974?	Yes

**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.
  - METRO has announced a temporary fare reduction county-wide on local, Highway-17 Express, and ParaCruz rides beginning Monday, March 22, 2021 through September 15, 2021. METRO's temporary fare reduction program was established to aid our community in recovery and provide financial relief to those who rely on METRO's services. Beginning Monday, March 22<sup>nd</sup> Local Regular Fares will be discounted fifty percent (50%) and Discount Fares will now be free on all local and Highway-17 Express routes. Additionally, ParaCruz Base Fares and Extended Fares will be discounted fifty percent



- (50%) for registered ParaCruz customers.
  - METRO announced that it would be providing free local transit rides to and from COVID-19 vaccination appointments in Santa Cruz County starting Friday, February 26, 2021.
  - METRO installed many COVID-19 prevention measures inside our vehicles and at transit centers to keep our customers and employees safe from infection. This includes installing onboard operator curtains, between row sneeze barriers, hand sanitizer dispensers, and increasing airflow including the circulation of inside and outside air, as well as reduced capacity limits on our buses. Additionally, METRO has increased the cleaning and sanitizing of our buses several times per day, cleaning all high-touch surfaces, and electrostatically fogging each vehicles with disinfectant nightly.
  - In an effort to further protect its customers, METRO encourages riders to use METRO's contactless/touchless fare payment tools, which in addition to Cash and METRO Pass smart cards, now includes new mobile ticketing app, METRO Splash Pass, available for download on Google Play and the Apple App Store. This cash-free, contactless, and COVID-19 safe, mobile ticketing solution allows METRO riders to purchase fares and display tickets on their smartphone devices anytime, anywhere. Riders have the option of purchasing Local and Highway 17 Express tickets including full or discounted options using a debit or credit card or via digital payment services such as Apple Pay.
  - METRO knows its customers want its services to go back to pre-COVID-19 levels so METRO is continuing to increase routes, frequency, and efficiency this spring. To that end, Routes 35/35A is now serving Scotts Valley Drive between Mt. Hermon Rd and Granite Creek Rd in both inbound and outbound directions. METRO is also adding limited weekday and weekend service back to Route 55 to serve the Via Pacifica Loop as well as adding additional weekend service to Route 16.
  - METRO Splash Pass, cash-free, contactless, and COVID-19 safe, mobile ticketing solution allows Santa Cruz METRO riders to purchase fares and display tickets on their smartphone devices anytime, anywhere. The METRO Splash Pass can be downloaded from Google Play and the Apple App Store. Riders have the option of purchasing Local and Highway 17 Express tickets including full or discounted options.
  - METRO is continuously fine-tuning the time of its route and considering route modification to improve efficiency.
- 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:
  - METRO's Zero-Emission Watsonville Circulator Operating Project will deploy new battery-electric buses on a new circulator route in downtown Watsonville in the Fall of 2021. The new service is designed to increase transit ridership by providing more frequent service to desirable commercial and professional destinations in Watsonville between 10 a.m. and 8 p.m. daily. The new route serves one of the lowest income communities in METRO's service area. The project would not only supplant the greenhouse gas emissions from a fossil fueled bus, but it would also provide additional service in an area of the county with a high proportion of transit users.
  - Purchase eight CNG buses replace diesel buses to help bring the fleet into a state of good repair.
  - Purchase 10 new vans to retire diesel buses which are beyond their useful life and will help METRO increase service reliability, and decrease operating costs.
  - Develop electric charging infrastructure and battery storage plan for electric buses serving Watsonville area.
  - 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.

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

- a. The need to implement stay-at-home measures in California to protect public health and safety, combined with the effects of the COVID-19 pandemic on the national economy, have dramatically affected METRO's state and local funding.
- b. Per TDA Fiscal Years 2016-2018 Triennial Performance Audit recommendation, METRO intends to use only "50% expenditure limitation" rather than farebox recovery in the TDA claims form to be consistent with METRO audited financial statements.
- c. At its September 5, 2019 meeting, the RTC approved METRO's request to allocate \$100,000 per year of the RTC's (PUC 99313) FY19/20-FY21/22 State Transit Assistance (STA) allocation to Community Bridges Lift Line and to allocate the balance of the RTC's FY19/20-FY21/22 share of STA and 100% of the RTC's (PUC 99313) of FY19/20-FY21/22 SB1-State Transit Assistance State of Good Repair (SGR) funds to METRO.

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

- ☒ SCMD – April each year
- ☐ Specialized Transportation: Quarterly<sup>1</sup> to E/D TAC, RTC \_\_\_\_\_ (Months/Year)
- ☐ 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.

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

22. Provide performance information, as pertinent, which demonstrate service efficiency and effectiveness, 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). (99246d, per Performance Audits)

a. *Volunteer Center, only:*

- ☐ provide a minimum 4,000 rides per year

23. Discuss the needs and types of the passengers being served, 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)

<sup>1</sup> If feasible, the quarterly TDA reports submitted by Community Bridges for Lift Line should include on-time performance of the service.

Vehicle on-time arrival to pick up a passenger at the scheduled time is an important measure of operational effectiveness and customer service.



**SCMTD, CTSC, Volunteer Center & RTC Only**

24. 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.
  - TDA Triennial Performance Audit (FY16-FY18) report includes a recommendation that the RTC and Santa Cruz METRO should clarify the performance eligibility criteria for TDA-Local Transportation Funds.
  - Article 4 of the TDA statute provides alternatives for Santa Cruz METRO to be eligible for TDA-Local Transportation Funds. One is for Santa Cruz METRO to meet the farebox recovery ratio. The other is to meet the 50 percent expenditure rule as an older operator, defined as service starting prior to 1974. Currently, Santa Cruz METRO meets both requirements but the documentation stating eligibility is not consistent.
  - Santa Cruz METRO is defined in the TDA as an older operator, having started service prior to July 1, 1974. Older operators may qualify for TDA under the 50% expenditure limitation (PUC Section 99268.1) or the farebox recovery ratio (PUC Section 99268.2). Pursuant to the TDA, Santa Cruz METRO meets the 50% expenditure limitation required by PUC §99268 and does not use the alternative revenue ratio to determine eligibility for TDA funds. This clarity will provide consistency in reporting of performance measures for LTF eligibility.
- 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.
  - All recommendations are being implemented.
- Describe any problems encountered in implementing individual recommendations.
  - None.

**SCMTD Only**

25. TDA Article 4 Eligibility Compliance – *Provide documentation for 50% expenditure limitation (PUC Section 99268.1).*

50 percent expenditure limitation (*use if LTF remains below 50 percent of its operating costs*):

- Overall operating cost for fiscal year: \$ \_\_\_\_\_
- TDA-LTF claim: \$ \_\_\_\_\_
- Source of information (*e.g. audited financial statements, budget, etc*):

The calculation below in Table shows the compliance.



Santa Cruz Metropolitan Transit District			
50 Percent Expenditure Limitation Calculation - FY22			
source: FY22 Draft BUDGET APPROVED 6/26/2021			
1	Total Operating Cost	\$ 55,857,105.00	
2	Total Depreciation	\$ 5,514,288.00	
3	Total Capital Outlay	\$ 27,543,552.00	
4	Total Lines 1,2,& 3		<b>\$ 88,914,945.00</b>
5a	Less: Federal Ops Grants Rec'd	\$ 7,863,002.00	
5b	Less: Federal Capital Grants Rec'd	\$ 6,023,283.00	
6	Less: LTF Capital Intensive	\$ -	
7	Less: STAF Received	\$ 3,454,690.00	
8	Total Lines 5,6 & 7		<b>\$ 17,340,975.00</b>
9	Total Line 4 Less Line 8		<b>\$ 71,573,970.00</b>
10	50% of Line 9	<b>\$ 35,786,985.00</b>	
	Add Amount of LTF Claimed in Excess of Line 10 for Match to		
11	Federal Operating Grant	\$ -	
12	Add LTF Capital Intensive	\$ -	
13	Total Permissible LTF Expenditure		<b>\$ 35,786,985.00</b>
14	Total LTF Applied to Operations		<b>\$ 7,468,499.00</b>

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.
- As set forth in Section 99268.2, ratio must be at least equal to one-fifth if serving an urbanized area or one-tenth if serving a non-urbanized area. If a ratio of the sum of fare revenues and local support to operating cost greater than one-fifth if serving an urbanized area, or one-tenth if serving a non-urbanized area, during the 1978 -79 fiscal year shall, at least, maintain that ratio in order to be eligible for additional funds pursuant to this section.
- Additional exclusions in calculating urban/rural farebox recovery: operating costs above the consumer price index for fuel, alternative fuel programs, power, insurance premiums and payments in settlement of claims, and state and federal mandates.

26. Did the SCMTD operating budget increase over 15% from the prior fiscal year? NO, the FY22 preliminary operating budget shows an increase of 2% % over the final FY21budget.

*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).*

27. 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 FY16– FY20 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 FY22, TDA funds will contribute an estimated \$2.60 per fixed-route passenger trip and \$14.01 per ParaCruz passenger trip.
- *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*

**Definitions:**

- a) "Operating cost" means all costs in the operating expense object classes exclusive of the costs in the depreciation and amortization expense object class of the uniform system of accounts and records adopted by the Controller pursuant to Section 99243. "Operating cost" excludes all subsidies for commuter rail services operated on railroad lines under the jurisdiction of the Federal Railroad Administration, all direct costs for providing charter services, all vehicles lease costs, and principal and interest payments on capital projects funded with certificates of participation.
- b) "Operating cost per passenger," means the operating cost divided by the total passengers.
- c) "Operating cost per vehicle service hour," means the operating cost divided by the vehicle service hours.



- d) *"Passengers per vehicle service hour" means the total passengers divided by the vehicle service hours.*
- e) *"Passengers per vehicle service mile" means the total passengers divided by the vehicle service miles.*
- f) *"Total passengers" means the number of boarding passengers, whether revenue producing or not, carried by the public transportation system.*
- g) *"Transit vehicle" means a vehicle, including, but not limited to, one operated on rails or tracks, which is used for public transportation services funded, in whole or in part, under this chapter.*
- h) *"Vehicle service hours" means the total number of hours that each transit vehicle is in revenue service, including layover time.*
- i) *"Vehicle service miles" means the total number of miles that each transit vehicle is in revenue service.*
- j) *"Vehicle service hours per employee" means the vehicle service hours divided by the number of employees employed in connection with the public transportation system, based on the assumption that 2,000 person-hours of work in one year constitute one employee. The count of employees shall also include those individuals employed by the operator, which provide services to the agency of the operator responsible for the operation of the public transportation system even though not employed in that agency.*

### **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)*
- ☐ **TDA Standard Assurances Checklist**

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### ***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: \_\_\_\_\_ Date: \_\_\_\_\_

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*Other Certifications- 1 & 2 from below, 10 & 11 and 15.*



## TDA Standard Assurances Checklist

**Claimant:** Santa Cruz Metropolitan Transit District

**Fiscal Year:** FY22

Assurance	Initial
<b>1. CERTIFIED FISCAL AUDIT (All Claimants)</b> Claimant certifies that it has submitted a satisfactory, independent fiscal audit, with the required certification statement, to (RTPA name) and to the State Controller's Office, pursuant to PUC 99245 and CCR 6664 for the prior fiscal year (project year minus two). Claimant assures that this audit requirement will be completed for the current fiscal year (project year minus one). <i>This requirement does not apply to new operators.</i>	AC
<b>2. STATE CONTROLLER REPORT (All Claimants)</b> Claimant certifies that it has submitted a State Controller's report in conformance with the uniform system of accounts and reports, to (RTPA name) and to the State Controller, pursuant to PUC 99243, for the prior year (project year minus two). Claimant assures that this report will be completed for the current fiscal year (project year minus one). <i>This requirement does not apply to new operators.</i>	AC
<b>3. PART-TIME EMPLOYEES (STAFF ONLY) (STA Claimants Only)</b> Claimant certifies that it is not precluded, by any contract, from employing part-time drivers or contracting with common carriers of persons operating under a franchise or license.	AC
<b>4. REVENUE RATIOS FOR COMMUNITY TRANSIT AND CONTRACTED TRANSIT SERVICES (CTSA &amp; Volunteer Center Only)</b> Claimant filing a claim pursuant to PUC 99275.5c and 99405c further certifies that, for the project year, it reasonably anticipates achieving the performance criteria, local match requirements, or fare recovery ratios adopted by the transportation planning agency or county transportation commission.	N/A
<b>5. REVENUE RATIOS FOR OPERATORS SERVING URBANIZED AND NONURBANIZED AREAS (METRO Only)</b> Claimant filing a claim pursuant to PUC 99270.1 certifies that it will maintain for the project year at least the alternative farebox recovery ratio as determined by the adopted (RTPA name) "fare ratio optional rule."	AC
<b>6. EXTENSION OF SERVICES (METRO Only)</b> Claimant that received an allocation of LTF funds for an extension of service pursuant to PUC 99268.8 certifies that it will file a report of these services pursuant to CCR 6633.8b within 90 days after the close of the fiscal year in which that allocation was granted.	AC
<b>7. RETIREMENT SYSTEM (METRO Only)</b> Claimant filing claim pursuant to PUC Section 99260 certifies that (check one):	
a) The current cost of its retirement system is fully funded with respect to the officers and employees of its public transportation system (PUC Section 99271a); or	AC
b) The operator is implementing a plan approved by the transportation planning agency which will fully fund the retirement system for such officers and employees within 40 years (PUC Section 99271a); or	
c) The operator has a private pension plan which sets aside and invests on a current basis funds sufficient to provide for the payment of future pension benefits and which is fully compliant with the requirements stated in PUC Sections 99272 and 99273.	
<b>8. USE OF FEDERAL FUNDS (Claimants Receiving Federal Funds)</b> Claimant filing a claim for TDA funds for capital intensive projects pursuant to PUC 99268.7 certifies that it has made every effort to obtain federal funding for any project which is funded pursuant to PUC 99268.7.	AC
<b>9. REDUCED FARES FOR ELDERLY AND HANDICAPPED (METRO Only)</b> A claimant filing a claim pursuant to PUC 99260 which offers reduced fares to senior citizens and disabled persons certifies that it is in compliance with PUC 99155.	AC



<b>10. DRIVERS PULL NOTICE PARTICIPATION (METRO &amp; Community Bridges Only)</b> A claimant filing a claim for public transit assistance must include a certification completed within the prior 13 months by the California Highway Patrol indicating the operator has participated in a "pull notice system" to examine driver's records.	AC
<b>11. INCREASE IN OPERATOR'S COST PER HOUR (STA Claimants Only)</b> Claimant filing a claim for operating assistance from STAF funds must include a supplemental schedule which identifies either: A - 1) the most recent audited cost per revenue vehicle hour (year 1) and the cost per revenue hour for the year prior to the most recent audit year (year 2) and 2) the Consumer Price Index for the year prior to the most recent audit year (year 2); or B - 1) the most recent audited cost per revenue vehicle hour (year 1) and the cost per revenue hour for the three years prior to the most recent audit year and 2) the Consumer Price Index for the three years prior to the most recent audit year. The supplemental schedule information will be used to determine eligibility pursuant to PUC 99314.6.	AC
<b>12. STAFFING ON VEHICLES (METRO &amp; Community Bridges Only)</b> Claimant certifies that it is in compliance with PUC Section 99264 that it does not routinely staff, with two or more persons, a vehicle for public transportation purposes designed to be operated by one person.	AC

Santa Cruz Metropolitan Transit District

(Legal Name of Applicant/Claimant)

(Authorizing Signature of CEO/CFO)

Alex Clifford, CEO/General Manager

(Name and Title)



Santa Cruz METRO Operating Financials					
Operating Expenses	FY16	FY17 - Restated	FY18	FY19	FY20
Local Fixed-Route Expenses	\$ 36,313,495.00	\$ 35,789,455.00	\$ 36,986,119.00	\$ 39,026,374.87	\$ 40,910,900.03
Highway 17	\$ 4,898,213.00	\$ 4,415,938.00	\$ 4,673,012.00	\$ 4,932,146.00	\$ 5,154,746.00
Paratransit	\$ 5,495,018.00	\$ 4,904,633.00	\$ 5,020,672.00	\$ 5,150,526.00	\$ 5,375,211.00
<b>TOTAL Operating Expenses*</b>	<b>\$ 46,706,726.00</b>	<b>\$ 45,110,026.00</b>	<b>\$ 46,679,803.00</b>	<b>\$ 49,109,046.87</b>	<b>\$ 51,440,857.03</b>
Operating Revenue	FY16	FY17 - Restated	FY18	FY19	FY20
Fixed-Route Fares	\$ 3,641,890.00	\$ 2,849,064.00	\$ 2,631,707.00	\$ 2,546,822.81	\$ 1,853,675.2
Fares-Contracts	\$ 3,726,200.00	\$ 4,424,951.00	\$ 5,273,571.00	\$ 5,330,372.73	\$ 4,059,315.5
Highway 17 Fares	\$ 1,816,162.00	\$ 1,644,388.00	\$ 1,564,281.00	\$ 1,549,495.90	\$ 1,068,135.7
Highway 17 Payments	\$ 411,842.00	\$ 503,961.00	\$ 523,636.00	\$ 526,429.80	\$ 534,911.2
ParaCruz Fares	\$ 327,768.00	\$ 298,506.00	\$ 287,363.00	\$ 285,840.50	\$ 217,664.0
Sales Tax	\$ 18,871,648.00	\$ 20,869,028.00	\$ 24,889,095.00	\$ 25,965,463.57	\$ 24,964,186.4
Federal Transit Administration (FTA)	\$ 5,626,562.00	\$ 6,454,874.00	\$ 6,738,883.00	\$ 6,969,093.00	\$ 25,752,598.0
Transit Development Act (TDA)	\$ 6,377,491.00	\$ 6,804,838.00	\$ 6,767,933.00	\$ 7,288,209.00	\$ 7,930,060.0
State Transit Assistance (STA)	\$ 2,636,432.00	\$ 2,041,333.00	\$ 3,196,463.00	\$ 4,253,929.00	\$ 4,346,687.0
Misc. Revenue	\$ 1,593,273.00	\$ 903,922.00	\$ 1,081,108.00	\$ 987,623.68	\$ 1,868,759.8
Transfers From/(To) Reserves	\$ 1,677,458.00	\$ (1,684,839.00)	\$ (6,274,237.00)	\$ (6,594,233.13)	\$ (21,155,135.8)
<b>TOTAL Operating Revenue</b>	<b>\$ 46,706,726.00</b>	<b>\$ 45,110,026.00</b>	<b>\$ 46,679,803.00</b>	<b>\$ 49,109,046.86</b>	<b>\$ 51,440,857.03</b>
Santa Cruz METRO Operating Statistics					
System Information	FY16	FY17	FY18	FY19	FY20
Directional Route Miles	479	398.37	398.65	381.96	387.12
Number of Bus Stops	936	931	845	824	825
Number of Routes	35	25	26	24	24
Total Active Fleet	98	98	100	101	94
Maximum Bus In-Svc	82	75	76	74	75
Total METRO Employees	329	311	319	303	312
Revenue Hour Per Employee	687	671	651	684	571
Local Fixed-Route Performance	FY16	FY17	FY18	FY19	FY20
Ridership	5,164,160	4,787,727	4,758,093	4,760,464	3,344,208
Revenue Hours	202,112	186,066	184,384	184,077	160,107
Revenue Miles	2,650,889	2,283,490	2,255,120	2,262,484	1,966,903
Passengers Per Hour	25.55	25.73	25.81	25.86	20.89
Passengers Per Mile	1.95	2.10	2.11	2.10	1.70
Passengers Per Capita	21.77	20.18	20.06	20.07	12.17
Revenue Hours Per Capita	0.85	0.78	0.78	0.78	0.58
Revenue Miles Per Capita	11.17	9.63	9.51	9.54	7.16
Total Cost Per Passenger	\$7.03	\$7.48	\$7.77	\$8.20	\$12.23
Revenue Per Passenger	\$1.43	\$1.52	\$1.66	\$1.65	\$1.77
Farebox Recovery	20.29%	20.32%	21.37%	20.18%	14.45%
Highway 17 Performance	FY16	FY17	FY18	FY19	FY20
Ridership	336,809	303,667	290,419	285,508	200,249
Revenue Hours	24,021	22,731	23,296	23,271	18,029
Revenue Miles	686,891	611,805	603,288	606,029	500,933
Passengers Per Hour	14.02	13.36	12.47	12.27	11.11
Passengers Per Mile	0.49	0.50	0.48	0.47	0.40
Passengers Per Capita	1.42	1.28	1.22	1.20	0.84
Revenue Hours Per Capita	0.10	0.10	0.10	0.10	0.08
Revenue Miles Per Capita	2.90	2.58	2.54	2.55	2.11
Total Cost Per Passenger	\$14.54	\$14.54	\$16.09	\$17.27	\$25.74
Revenue Per Passenger	\$6.62	\$7.07	\$7.19	\$7.27	\$8.01
Farebox Recovery	37.08%	37.24%	33.47%	31.42%	20.72%
Fixed-Route Total Performance	FY16	FY17	FY18	FY19	FY20
Ridership	5,500,969	5,091,394	5,048,512	5,045,972	3,544,457
Revenue Hours	226,135	208,797	207,680	207,348	178,136
Revenue Miles	3,337,779	2,895,295	2,858,408	2,868,513	2,467,836
Passengers Per Hour	24.33	24.38	24.31	24.34	19.90
Passengers Per Mile	1.65	1.76	1.77	1.76	1.44
Passengers Per Capita	24.61	22.74	22.50	22.47	15.78
Revenue Hours Per Capita	1.05	0.98	0.97	0.97	0.83
Revenue Miles Per Capita	14.07	12.20	12.05	12.09	10.40
Total Cost Per Passenger	\$ 7.49	\$ 7.90	\$ 8.25	\$ 8.71	\$ 13.00
Revenue Per Passenger	\$ 1.74	\$ 1.85	\$ 1.98	\$ 1.97	\$ 2.12
Farebox Recovery	22.29%	22.18%	22.73%	21.44%	15.15%
Subsidy Per Passenger	\$ 5.75	\$ 6.05	\$ 6.27	\$ 6.74	\$ 10.88
Cost Per Revenue Hour	\$ 182.24	\$ 192.56	\$ 200.59	\$ 212.00	\$ 258.60
ParaCruz Performance	FY16	FY17	FY18	FY19	FY20
Ridership	85,768	75,116	72,209	73,497	61,631
Revenue Hours	44,918	39,474	38,779	44,804	35,181
Revenue Miles	488,017	456,208	451,985	464,816	356,875
Passengers Per Hour	1.91	1.90	1.86	1.64	1.75
Passengers Per Mile	0.18	0.16	0.16	0.16	0.17
Passengers Per Capita	0.36	0.32	0.30	0.31	0.26
Revenue Hours Per Capita	0.19	0.17	0.16	0.19	0.15
Revenue Miles Per Capita	2.06	1.92	1.91	1.96	1.50
Total Cost Per Passenger	\$ 64.07	\$ 65.29	\$ 69.53	\$ 70.08	\$ 87.22
Revenue Per Passenger	\$ 3.82	\$ 3.97	\$ 3.98	\$ 3.89	\$ 3.53
Farebox Recovery	5.96%	6.09%	5.72%	5.55%	4.05%
Subsidy Per Passenger	\$ 60.25	\$ 61.32	\$ 65.55	\$ 66.19	\$ 83.68
Cost Per Revenue Hour	\$ 122.33	\$ 124.25	\$ 129.47	\$ 114.96	\$ 152.79

\* Expenses do not include year-end Depreciation, W/C IBNR, GASB 75 OPEB adjustments, or GASB 68 Pension adjustments

\*\* Highway 17 Farebox Recovery including Highway 17 Payments



SANTA CRUZ METROPOLITAN TRANSIT DISTRICT - 5 - YEAR BUDGET PLAN

REVENUE:	BUDGET FY21	BUDGET FY22	% VAR	BUDGET FY23	% VAR	FORECASTED BUDGET FY24	% VAR	FORECASTED BUDGET FY25	% VAR	FORECASTED BUDGET FY26	% VAR
Passenger Fares	10,254,772	7,459,084	-27.3%	7,584,936	1.7%	7,604,854	0.3%	7,625,526	0.3%	7,646,789	0.3%
<i>Passenger Fares</i>	2,371,000	1,000,000	-57.8%	1,070,000	7.0%	1,091,400	2.0%	1,113,228	2.0%	1,135,493	2.0%
<i>Special Transit Fares</i>	5,584,803	5,313,316	-4.9%	5,314,203	0.0%	5,315,127	0.0%	5,316,079	0.0%	5,317,070	0.0%
<i>Paratransit Fares</i>	291,566	122,972	-57.8%	131,580	7.0%	134,211	2.0%	136,896	2.0%	139,633	2.0%
<i>Highway 17 Fares</i>	1,489,600	500,000	-66.4%	534,068	6.8%	528,727	-1.0%	523,440	-1.0%	518,206	-1.0%
<i>Highway 17 Payments</i>	517,803	522,796	1.0%	535,085	2.4%	535,389	0.1%	535,883	0.1%	536,387	0.1%
Other Revenue	1,168,500	727,795	-37.7%	781,140	7.3%	839,451	7.5%	899,922	7.2%	918,263	2.0%
1979 Gross Sales Tax (1/2 cent)	22,388,476	22,737,248	1.6%	22,737,248	0.0%	22,737,248	0.0%	22,737,248	0.0%	22,737,248	0.0%
2016 Net Sales Tax (Measure D)	3,500,617	3,562,284	1.8%	3,562,284	0.0%	3,562,284	0.0%	3,562,284	0.0%	3,562,284	0.0%
Transp Dev Act (TDA) - Op Asst	7,628,850	7,468,499	-2.1%	7,468,499	0.0%	7,468,499	0.0%	7,468,499	0.0%	7,468,499	0.0%
*Federal Op Assistance	4,774,146	4,964,441	4.0%	5,073,162	2.2%	5,184,265	2.2%	5,297,800	2.2%	5,413,822	2.2%
STA - Operating (includes SB1)	4,494,411	3,454,690	-23.1%	3,394,950	-1.7%	3,426,080	0.9%	3,454,268	0.8%	3,592,439	4.0%
STA - Operating (includes SB1) (Transfer to Capital Budget)	-	-	0.0%	-	0.0%	-	0.0%	-	0.0%	-	0.0%
STIC - Op Assistance	2,702,626	2,898,561	7.2%	2,962,039	2.2%	3,026,908	2.2%	3,093,197	2.2%	3,160,938	2.2%
LCTOP Grant	-	489,213	100.0%	-	-100.0%	-	0.0%	-	0.0%	-	0.0%
Fuel Tax Credit	351,000	175,000	-50.1%	-	-100.0%	-	0.0%	-	0.0%	-	0.0%
<b>TOTAL REVENUE</b>	<b>57,263,398</b>	<b>53,936,815</b>	-5.8%	<b>53,564,258</b>	-0.7%	<b>53,849,589</b>	0.5%	<b>54,138,743</b>	0.5%	<b>54,500,281</b>	0.7%
<b>OPERATING EXPENSES:</b>											
Labor and Fringe Benefits: Bus Operators	19,141,193	19,323,803	1.0%	19,951,828	3.3%	20,514,191	2.8%	21,025,998	2.5%	21,625,033	2.8%
Labor and Fringe Benefits: Paratransit	4,571,060	4,797,859	5.0%	4,913,690	2.4%	5,066,346	3.1%	5,207,981	2.8%	5,359,142	2.9%
Labor and Fringe Benefits: Other	21,653,074	21,730,522	0.4%	22,588,484	3.9%	23,297,835	3.1%	23,910,655	2.6%	24,546,231	2.7%
Services	3,810,626	3,855,716	1.2%	3,871,844	0.4%	3,771,843	-2.6%	3,771,843	0.0%	3,871,843	2.7%
Mobile and Other Materials and Supplies	3,317,090	3,325,537	0.3%	3,328,067	0.1%	3,328,067	0.0%	3,328,067	0.0%	3,328,067	0.0%
Utilities	649,000	715,132	10.2%	715,306	0.0%	715,306	0.0%	715,306	0.0%	715,306	0.0%
Casualty & Liability and Taxes	1,064,607	1,163,471	9.3%	1,163,471	0.0%	1,163,471	0.0%	1,163,471	0.0%	1,163,471	0.0%
Purchased Transportation	-	733	100.0%	-	-100.0%	-	0.0%	-	0.0%	-	0.0%
Misc. Expense, Interest Expense, and Leases & Rentals	791,759	945,064	19.4%	888,346	-6.0%	888,346	0.0%	888,346	0.0%	888,346	0.0%
<b>TOTAL OPERATING EXPENSES</b>	<b>54,998,409</b>	<b>55,857,105</b>	1.6%	<b>57,421,036</b>	2.8%	<b>58,745,404</b>	2.3%	<b>60,011,667</b>	2.2%	<b>61,497,439</b>	2.5%
<b>TRANSFERS:</b>											
Transfers to Capital Budget	2,264,991	2,239,734	-1.1%	2,347,504	4.8%	2,375,233	1.2%	2,410,511	1.5%	2,410,511	0.0%
Transfers to Operating and Capital Reserve Fund (includes UAL & OPEB)	-	2,175,000	100.0%	2,000,000	-8.0%	2,000,000	0.0%	2,000,000	0.0%	2,000,000	0.0%
Transfers to/(from) COVID Reserve Fund	-	(6,335,023)	100.0%	(8,204,283)	29.5%	-	-100.0%	-	0.0%	-	0.0%
<b>TOTAL TRANSFERS</b>	<b>2,264,991</b>	<b>(1,920,289)</b>	<b>-184.8%</b>	<b>(3,856,779)</b>	<b>100.8%</b>	<b>4,375,233</b>	<b>-213.4%</b>	<b>4,410,511</b>	<b>0.8%</b>	<b>4,410,511</b>	<b>0.0%</b>
<b>Operating Balance</b>	<b>-</b>	<b>-</b>		<b>-</b>		<b>(9,271,048)</b>		<b>(10,283,435)</b>		<b>(11,407,669)</b>	



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
FY22 & FY23 OPERATING BUDGET - PRELIMINARY  
REVENUE SOURCES**

REVENUE SOURCE		Jun-20 BUDGET FY21	Mar-21 BUDGET FY22	% CHANGE BUDG FY21 BUDG FY22	Mar-21 BUDGET FY23	% CHANGE BUDG FY22 BUDG FY23
1	Passenger Fares	2,371,000	1,000,000	-57.8%	1,070,000	7.0%
2	Special Transit Fares	5,584,803	5,313,316	-4.9%	5,314,203	0.0%
3	Paratransit Fares	291,566	122,972	-57.8%	131,580	7.0%
4	Highway 17 Fares	1,489,600	500,000	-66.4%	534,068	6.8%
5	Highway 17 Payments	517,803	522,796	1.0%	535,085	2.4%
6	Commissions	2,500	1,000	-60.0%	1,000	0.0%
7	Advertising Income	343,750	200,000	-41.8%	250,000	25.0%
8	Rent Income	165,000	167,245	1.4%	170,590	2.0%
9	Interest Income	275,000	295,000	7.3%	295,000	0.0%
10	Other Non-Transp Revenue	176,700	64,000	-63.8%	64,000	0.0%
11	1979 Gross Sales Tax (1/2 cent)	22,388,476	22,737,248	1.6%	22,737,248	0.0%
12	2016 Net Sales Tax (Measure D)	3,500,617	3,562,284	1.8%	3,562,284	0.0%
13	Transp Dev Act (TDA - LTF) Funds	7,628,850	7,468,499	-2.1%	7,468,499	0.0%
14*	FTA Sec 5307 - Op Assistance	4,582,912	4,763,645	3.9%	4,867,969	2.2%
15	FTA Sec 5311 - Rural Op Asst	191,234	200,796	5.0%	205,193	2.2%
16	AMBAG/Misc. Grant Funding	205,000	-	-100.0%	-	0.0%
17	STIC	2,702,626	2,898,561	7.2%	2,962,039	2.2%
18	LC TOP Grant	-	489,213	100.0%	-	-100.0%
19	TDA - STA - Operating (Includes SB1)	4,494,411	3,454,690	-23.1%	3,394,950	-1.7%
20	Fuel Tax Credit	351,000	175,000	-50.1%	-	-100.0%
21	Medicare Subsidy	550	550	0.0%	550	0.0%
<b>TOTAL REVENUE</b>		<b>57,263,398</b>	<b>53,936,815</b>	<b>-5.8%</b>	<b>53,564,258</b>	<b>-0.7%</b>
<b>TRANSFERS</b>		<b>(2,264,991)</b>	<b>1,920,289</b>	<b>-184.8%</b>	<b>3,856,779</b>	<b>100.8%</b>
<b>TOTAL OPERATING REVENUE</b>		<b>54,998,408</b>	<b>55,857,104</b>	<b>1.6%</b>	<b>57,421,037</b>	<b>2.8%</b>

\* FTA funding is used solely to fund labor expense



SANTA CRUZ METROPOLITAN TRANSIT DISTRICT												
FY22 PRELIMINARY CAPITAL BUDGET												
AS OF MARCH 26, 2021												
			RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	BUS REPLACEMENT FUND				
								\$3M PER YEAR (MEASURE D + SB1 STA&SGR)				
									RESTRICTED	RESTRICTED		
								STA-SB1 (XFR FROM OPER BUDGET)	STA-SGR (SB 1)	MEASURE D (XFR FROM OPER BUDGET)	OPERATING & CAPITAL RESERVE FUND	TOTAL
		PROJECT/ACTIVITY	FEDERAL FUNDS	PTMISEA (1B)	STIP	LCTOP	LPP					
<b>Construction Related Projects</b>												
1	19-0001	New METRO Owned Paracruz Facility-FY20 LPP (Grant Match for 5339(b))									\$ 2,231,329	\$ 2,231,329
2	19-0002	Pacific Station/Metro Center Redevelopment w/ City of SC								\$ 3,000,000		\$ 3,000,000
3	19-0003	Pacific Station/Metro Center-Conceptual Design/MOU (5309)	\$ 117,934					\$ 29,483				\$ 147,416
		Subtotal	\$ 117,934	\$ -	\$ -	\$ -	\$ -	\$ 29,483	\$ -	\$ 3,000,000	\$ 2,231,329	\$ 5,378,745
<b>IT Projects</b>												
4	19-0004	ERP Consultant (\$50K Consulting) & System									\$ 800,000	\$ 800,000
		Subtotal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 800,000	\$ 800,000
<b>Facilities Upgrades &amp; Improvements</b>												
5	19-0006	Maint Yard-Security Hardening/Expanded Parking									\$ 888,328	\$ 888,328
6	19-0006a	Access Control for Maintenance Facility									\$ 48,228	\$ 48,228
7	19-0010	Bus Stop Improvements (FTA 5339a FY18)	\$ 118,875									\$ 118,875
8	19-0011	Gate Control at JKS Bus Entry (FTA 5339a FY18)	\$ 100,000									\$ 100,000
9	19-0012	JKS Facility - Bus Wash Rehab (FTA 5339a FY19)	\$ 100,000									\$ 100,000
10	19-0013	JKS Facility - Upper Security Gates									\$ 100,000	\$ 100,000
11	19-0017	138 Golf Club Fire Egress (FTA 5339a FY17 & FY19, Reserves)	\$ -								\$ 11,531	\$ 11,531
12	19-0016	Paint Exterior-Maint. Facility (FTA 5339a FY18)	\$ 128,659									\$ 128,659
13	19-0018	Awning @ Fueling Station A&E only (FTA 5339a FY18 & Reserve)	\$ -								\$ 7,186	\$ 7,186
14	19-0020	Admin Bldg. Engineering & Renovations									\$ 20,000	\$ 20,000
15	19-0018a	Awning @ Fueling Station - Construction Phase (FTA 5339a FY20)	\$ 238,908									\$ 238,908
		Subtotal	\$ 686,442	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,075,273	\$ 1,761,715
<b>Revenue Vehicle Purchases, Replacements &amp; Campaigns</b>												
16	19-0024	Replace Six (6) CNG Buses (PTMISEA)		\$ 4,036,017						\$ 100,000		\$ 4,136,017
17	19-0028	Refurb 4 Buses @ ~ \$254K (FY18 STIP, Measure D)			\$ -					\$ 171,213		\$ 171,213
18	19-0027	FY18 STIP - AVL/ITS (STIP, Measure D)			\$ 635,541					\$ -		\$ 635,541
19	20-0001	7 Replacement Paracruz Vans (FY19 LPP, Measure D)					\$ 302,000			\$ 303,131		\$ 605,131
20	19-0032	3 New Flyer Repl. Capital Lease - Year 4 of 6 Prin Only - (Measure D) Interest funded in Operating Budget \$32K								\$ 259,182		\$ 259,182
21	19-0033	Paracruz Van Replacement (3) (STBG FY19 via RTC)	\$ 200,000							\$ 52,132	\$ 7,210	\$ 259,342
22	19-0035	Completion of Cameras on Buses (6 buses)									\$ 7,227	\$ 7,227
23	20-0002	2 35' CNG Buses (FY19 Caltrans Discretionary FTA 5339; Bus Replacement Fund)	\$ 1,088,000							\$ 272,000		\$ 1,360,000
24	20-0003	14 CNG Buses, Lease to Buy; Capital Lease - Year 1 of 6 Prin Only - (Bus Replacement Fund: SGR; Measure D)							\$ 700,000	\$ 800,000		\$ 1,500,000
		Subtotal	\$ 1,288,000	\$ 4,036,017	\$ 635,541	\$ -	\$ 302,000	\$ -	\$ 700,000	\$ 1,957,658	\$ 14,437	\$ 8,933,653



**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
FY22 PRELIMINARY CAPITAL BUDGET  
AS OF MARCH 26, 2021**

			RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED						
								BUS REPLACEMENT FUND					
								\$3M PER YEAR (MEASURE D + SB1 STA&SGR)					
									RESTRICTED	RESTRICTED			
			FEDERAL FUNDS	PTMISEA (1B)	STIP	LCTOP	LPP	STA-SB1 (XFR FROM OPER BUDGET)	STA-SGR (SB 1)	MEASURE D (XFR FROM OPER BUDGET)	OPERATING & CAPITAL RESERVE FUND		TOTAL
		PROJECT/ACTIVITY											
<b>Revenue Vehicle Purchases, Replacements &amp; Campaigns-Fleet Electrification Projects</b>													
25	19-0026	FY18 STIP - 2 ZEBs (STIP, LPP, HVIP = \$300K)			\$ 720,899		\$ 786,000			\$ 656,811			\$ 2,163,710
26	19-0037	Electric Bus (3) + Infra & Proj Mgmt. (FTA 5339c FY16)	\$ 3,552,987							\$ 1,087,153			\$ 4,640,140
27	19-0038	Electric Bus (1) - Watsonville Circulator DAC (FY15/16 LCTOP) - (Memo Only - HVIP = \$150K)		\$ 357,216		\$ 562,636				\$ 185,051			\$ 1,104,903
28	19-0039	Electric Bus (1) - Watsonville Service (FY17/18 LCTOP)				\$ 860,656				\$ 231,843			\$ 1,092,499
29	19-0041	Completion of JKS Facility-ZEB Yard Charging Infrastructure									\$ 262,500		\$ 262,500
30	19-0042	ZEB Deployment & Fleet Planning (CTE)									\$ 8,500		\$ 8,500
31	20-0004	Bus Wrap Electric Buses									\$ 52,000		\$ 52,000
32	21-0002	Drivers Barriers								\$ 526,060			\$ 526,060
		Subtotal	\$ 3,552,987	\$ 357,216	\$ 720,899	\$ 1,423,292	\$ 786,000	\$ -	\$ -	\$ 2,686,918	\$ 323,000		\$ 9,850,312
<b>Non-Revenue Vehicle Purchases &amp; Replacements</b>													
33	19-0043	Replace Custodial Support Vehicle (1) (FTA5339a FY18)	\$ 2,920										\$ 2,920
34	21-0005	Non-Revenue Electric Vehicles (FTA 5339a FY20)	\$ 100,000										\$ 100,000
35	21-0006	Service Truck (FTA 5339a FY20)	\$ 150,000										\$ 150,000
		Subtotal	\$ 252,920	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 252,920
<b>Fleet &amp; Maint Equipment</b>													
36	19-0045	Floor Scrubber (1) for Maint. Shop (FTA 5339a FY18)	\$ 45,000										\$ 45,000
37	21-0004	Golf Club Part Washers (FTA 5339a FY20)	\$ 80,000										\$ 80,000
		Subtotal	\$ 125,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -		\$ 125,000
<b>Office Equipment</b>													
		Subtotal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Misc.</b>													
38	19-0048	Misc Capital Contingency-\$800K - 11/15/19 BOD											
39	19-0048h	EOC Equipment									\$ 191,173		\$ 191,173
40	19-0048j	Vapor Compressor replacement (at Fueling Station)									\$ 10,400		\$ 10,400
41	19-0048m	Zoom System for Conference Room									\$ 162,134		\$ 162,134
42	21-0007	Hardware for Bus Stop Redesign									\$ 5,500		\$ 5,500
		Subtotal	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 70,000		\$ 70,000
											\$ 441,207		\$ 441,207
<b>TOTAL CAPITAL PROJECTS</b>			<b>\$ 6,023,283</b>	<b>\$ 4,393,233</b>	<b>\$ 1,356,440</b>	<b>\$ 1,423,292</b>	<b>\$ 1,088,000</b>	<b>\$ 29,483</b>	<b>\$ 700,000</b>	<b>\$ 7,644,576</b>	<b>\$ 4,885,246</b>		<b>\$ 27,543,552</b>



SANTA CRUZ METROPOLITAN TRANSIT DISTRICT												
FY22 PRELIMINARY CAPITAL BUDGET												
AS OF MARCH 26, 2021												
			RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	RESTRICTED	BUS REPLACEMENT FUND				
								\$3M PER YEAR (MEASURE D + SB1 STA&SGR)				
									RESTRICTED	RESTRICTED		
								STA-SB1 (XFR FROM OPER BUDGET)	STA-SGR (SB 1)	MEASURE D (XFR FROM OPER BUDGET)	OPERATING & CAPITAL RESERVE FUND	TOTAL
		PROJECT/ACTIVITY	FEDERAL FUNDS	PTMISEA (1B)	STIP	LCTOP	LPP					
<b>CAPITAL PROGRAM FUNDING</b>												
<b>Federal Sources of Funds:</b>												
		Federal Grants (FTA)	\$ 5,823,283									\$ 5,823,283
		Surface Transportation Block Grant (STBG)	\$ 200,000									\$ 200,000
<b>State Sources of Funds:</b>												
		PTMISEA (1B)		\$ 4,393,233								\$ 4,393,233
		State Transportation Improvement Program (STIP)			\$ 1,356,440							\$ 1,356,440
		Low Carbon Transit Operations Program (LCTOP)				\$ 1,423,292						\$ 1,423,292
		Local Partnership Program (LPP)					\$ 1,088,000					\$ 1,088,000
		State Transit Assistance (STA)-Prior Years						\$ 29,483				\$ 29,483
		Transfers from Operating Budget (STA-SB1)	*									\$ -
		STA-SGR (SB1)	*						\$ 700,000			\$ 700,000
		Transfers from Operating Budget (Measure D)	*							\$ 7,644,576		\$ 7,644,576
<b>Local Sources of Funds:</b>												
		Operating and Capital Reserve Fund									\$ 4,885,246	\$ 4,885,246
<b>TOTAL CAPITAL FUNDING BY FUNDING SOURCE</b>			<b>\$ 6,023,283</b>	<b>\$ 4,393,233</b>	<b>\$ 1,356,440</b>	<b>\$ 1,423,292</b>	<b>\$ 1,088,000</b>	<b>\$ 29,483</b>	<b>\$ 700,000</b>	<b>\$ 7,644,576</b>	<b>\$ 4,885,246</b>	<b>\$ 27,543,552</b>
		Restricted Funds	\$ 6,023,283	\$ 4,393,233	\$ 1,356,440	\$ 1,423,292	\$ 1,088,000		\$ 700,000	\$ 7,644,576		\$ 22,628,824
		Unrestricted Funds						\$ 29,483			\$ 4,885,246	\$ 4,914,728
<b>TOTAL CAPITAL FUNDING</b>			<b>\$ 6,023,283</b>	<b>\$ 4,393,233</b>	<b>\$ 1,356,440</b>	<b>\$ 1,423,292</b>	<b>\$ 1,088,000</b>	<b>\$ 29,483</b>	<b>\$ 700,000</b>	<b>\$ 7,644,576</b>	<b>\$ 4,885,246</b>	<b>\$ 27,543,552</b>
* NOTE: The amounts listed here represent the amounts committed against awarded grants and projects, and therefore will not equal the \$3M allocated to the Bus Replacement Fund in any given year.												



**TO:** Elderly and Disabled Transportation Advisory Committees

**FROM:** Rachel Moriconi, Transportation Planner

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

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## **RECOMMENDATIONS**

Staff recommends that the Elderly and Disabled Transportation Advisory Committee (E&D TAC) review Community Bridges Lift-Line's proposed Five-Year Plan for its direct allocation of Measure D: Transit for Seniors and People Living with Disabilities investment category funds.

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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 preservation and analysis of the rail corridor (8%).

Each agency receiving Measure D revenues 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 5-year plans are adjusted annually based on updated project priorities, schedule, cost, and revenue 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, some agencies carryover or "bank" revenues to future years or finance projects and use Measure D revenues to repay loans.

## **DISCUSSION**

Twenty percent (20%) of net Measure D revenues are designated for the Transit for Seniors and People Living with Disabilities category, with four percent (4%) allocated to the Consolidated Transportation Services Agency (CTSA) for Santa Cruz County for paratransit service and Community Bridges-Lift Line serves as the CTSA for Santa Cruz County and 16% of net Measure D revenues allocated to the Santa Cruz Metropolitan Transit District.



Including unspent balances from prior years, approximately \$4.7 million in Measure D formula funds are expected to be available to Community Bridges-Lift Line for the five-year period ending in Fiscal Year 2025/26 (FY25/26). Community Bridges-Lift Line's proposed use of its direct formula share of Measure D revenues between FY21/22 through FY25/26 is attached (Attachments 1-2) and includes:

- Drivers 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;
- Trainer who will supervise and provide training for drivers, including ongoing retraining;
- Administrative assistant and dispatcher, includes scheduling rides, receiving and screening telephone calls, maintaining records, preparing statistics, reports, correspondence and coordination of tasks;
- Outreach and publicity to provide materials and videos to promote paratransit ride availability;
- Operations Facility: Due to Measure D, Lift Line was able to purchase and renovate an operations facility in Watsonville to house the entire Lift Line operations in one location. Measure D revenues are being used to repay loans which were secured to accelerate implementation and for consultants and project managers for completion of the operations facility;
- Vehicles and equipment. Measure D is being used to leverage other grants to purchase new fleet vehicles, and replace aging and worn shop improvement or upgrades to the maintenance and operations facility.

Community Bridges-Lift Line is the only agency receiving a direct allocation of Measure D fund that is not a public agency, as such review and approval of Community Bridges Lift Line Measure D five-year plan is overseen by the Regional Transportation Commission (RTC) and included in the RTC's public review process.

**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 its May 6, 2021 public meeting.

## **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 Community Bridges Lift-Line proposed Five-Year Plan for its formula share of Measure D revenues.

### Attachments:

1. Community Bridges Lift Line Paratransit Service 5-year program of projects
2. Community Bridges Lift Line Major Project: Lift Line Operations Facility and Lift Line Vehicle and Equipment Acquisition 5-year plans

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**Measure D: 5-Year Program of Projects (FY21/22-25/26)**
**Attachment 1**
**Agency:** Community Bridges - Lift Line
**Category:** Transportation for E&D
**Estimated Annual Measure D Allocations**

Prior and 20/21	FY21/22	FY22/23	FY23/24	FY24/25	FY25/26	Total
\$3,340,459	\$875,159	\$905,220	\$919,785	\$934,584	\$949,620	\$7,924,827

Amount of Measure D Funds Programmed (includes carryover)										
Project Name/location	Description	Total Measure D	Prior and 20/21 estimate	FY21/22	FY22/23	FY23/24	FY24/25	FY25/26	5-Year Total	Other fund sources
Driver 1 (see note below*)	Additional driver to provide expanded hours of paratransit service	\$1,338,682	\$527,774	\$ 151,219	\$ 156,512	\$ 161,990	\$ 167,660	\$ 173,528	\$ 810,909	
Driver 2 (see note below*)	Additional driver to provide expanded hours of paratransit service	\$1,338,682	\$527,774	\$ 151,219	\$ 156,512	\$ 161,990	\$ 167,660	\$ 173,528	\$ 810,909	
Driver 3 (see note below*)	Additional driver to provide expanded hours of paratransit service	\$457,451	\$0	\$ -	\$ 57,132	\$ 59,132	\$ 167,660	\$ 173,528	\$ 457,451	
Driver Trainer	To support safety and service training for paratransit drivers	\$448,546	\$171,805	\$ 51,607	\$ 53,413	\$ 55,283	\$ 57,218	\$ 59,220	\$ 276,740	
Executive Assistant/Dispatcher	To support additional paratransit rides	\$448,885	\$177,483	\$ 50,611	\$ 52,383	\$ 54,216	\$ 56,114	\$ 58,078	\$ 271,402	
Outreach/Publicity	Materials and videos to promote paratransit ride availability	\$107,248	\$36,463	\$ 13,200	\$ 13,662	\$ 14,140	\$ 14,635	\$ 15,147	\$ 70,785	
Consultants / Project Managers	Facility project management-architects, environ review, design	\$248,503	\$201,340	\$ 47,163	\$ -	\$ -	\$ -	\$ -	\$ 47,163	
Operations Facility	Reserve for projected Acquisition, construction and/or renovation expenses for facility	\$3,321,826	\$1,444,490	\$ 508,465	\$ 400,606	\$ 398,034	\$ 288,639	\$ 281,592	\$ 1,877,335	2.3M Bank and Owner Financing
Vehicle Equipment Reserve	Vehicle/ Equip replacement, matching funds, project procurement and implementation	\$216,731	\$108,221	\$ 48,510	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 108,510	750K+ of LCTOP and CARB grants
<b>Estimated Annual Measure D Expenditures</b>		<b>\$7,926,553</b>	<b>\$3,195,350</b>	<b>\$1,021,995</b>	<b>\$905,220</b>	<b>\$919,785</b>	<b>\$934,584</b>	<b>\$949,620</b>	<b>\$4,731,204</b>	

\*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 (FY20/21-FY24/25)**

Project name:  
Location:  
Description:  
Purpose/Need/Benefits:

<b>Community Bridges - Lift Line Vehicle and Equipment Acquisition</b>
<b>N/A</b>
<b>Lift Line Paratransit Vehicles &amp; Equipment</b>
Fund reserves that can be used vehicle procurement projects, including fleet vehicles that cannot be funded through 5310, replace ageing and or worn shop equipment, improvements and or upgrades to maintenance/operations facility. Provide project matching funds to leverage state funding. 1) 21/22 California Air Resources Board Vehicle Match for 14 passenger electric bus 2) 21/22-22/23 Ecolane dispatching and scheduling and fleet operations software. 3) 23/24-25/26 Additional project matching funds for potential vehicle purchases and required vehicle related equipment.

**Schedule (estimated)**  
**Total Cost by Phase**

Measure D Funds  
Matching Funds

<b>CARB</b>	<b>Equipment</b>	<b>Equipment*</b>	<b>Total</b>
FY21/22	FY21/22-22/23	FY23/24-25/26	
<b>\$ 248,949</b>	<b>\$ 116,563</b>	<b>\$ 440,000</b>	<b>\$ 805,512</b>
\$ 33,510	\$ 30,000	\$ 45,000	\$ 108,510
\$ 215,439	\$ 86,563	\$ 395,000	\$ 697,002
CARB	Ecolane	Other Vehicle Projects	

\*Future Equipment in FY 23/24-25/26 is estimated based on past projects



## Measure D: 5-Year Plan (FY21/22-FY25/26)

Project name:  
Location:  
Description:  
Purpose/Need/Benefits:

<b>Community Bridges - Lift Line Operations Facility</b>					
<b>545 Ohlone Pkwy, Watsonville, CA 95076</b>					
<b>Lift Line Administrative offices, maintenance facility, fleet parking</b>					
Purchase of property and renovation of a operations facility housing the entire CTSA Lift Line operations in one location. In June of 2019 Lift Line purchased a suitable \$3M property at 545 Ohlone Pkwy, Watsonville CA, with an estimated additional \$1.8M of renovations and other expenses. Measure D facility reserve funds were used for a \$500K down payment and closing costs, financing \$2.3M. In June of 2020, Measure D funds were used to make a \$200K principal payment on a 5-year \$1M owner carry note, and are being utilized in the renovation costs and other associated expenses. Plans are to continue to pay \$200K in June of 2021, and three additional years to pay the owner carry note, leave \$1.5M financed. An additional major project planned for FY 21/22 is a grading and paving project with an estimated cost of 300K, of which Measure D funding will be utilized for the majority of the project.					

**Schedule**  
**Total Cost by Phase**

Envir. Review	Design	Acquisition	Renovation	Contingency/ Fees	Total
2019-2021	2019-2021	2019-2020	2019-2026	2020-2026	
<b>\$ 124,297</b>	<b>\$ 202,903</b>	<b>\$ 3,099,532</b>	<b>\$ 2,337,525</b>	<b>\$ 272,250</b>	<b>\$ 6,036,507</b>
Measure D Funds	\$ 124,297	\$ 202,903	\$ 799,532	\$ 2,195,094	\$ 3,321,826
Donations			\$ 142,431	\$ 272,250	\$ 414,681
Loan/Owner Financing		\$ 2,300,000			\$ 2,300,000

**Other Info:**

**Personnel/Consultants:**

Personnel	76,810
Legal	7,500
Bidding Expense	6,500

**Pre-Development:**

Architecture Design	202,903
Survey / Engineering	43,200
Permits, Inspections and Fees	16,524

**Acquisition:**

Purchase of Property	3,099,532
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**Construction/Renovation:**

Construction / Renovation	2,337,525
Permits, Inspections and Fees	64,573
Equipment / Furnishings	75,000
Contingency / Utility Fees	106,440

**Total Preliminary Cost** **6,036,507**



**TO:** Elderly & Disabled Transportation Advisory Committee  
**FROM:** Amanda Marino, Transportation Planner  
**RE:** Draft 2021 Unmet Paratransit and Transit Needs List

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## **RECOMMENDATION**

Staff recommends that the Elderly & Disabled Transportation Advisory Committee review the *Draft 2021 Unmet Paratransit and Transit Needs List* (Attachment 1), provide amendment as necessary and forward the list to the RTC for their consideration on May 6, 2021.

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## **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 2021 Unmet Paratransit and Transit Needs List* at the February 9, 2021 meeting. The *Draft 2021 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 February 9, 2021 meeting, 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 2021 Unmet Paratransit and Transit Needs List (Attachment 1)* and recommends the Regional Transportation Commission adopt the *Final 2021 Unmet Paratransit and Transit Needs* list following a public hearing on May 6, 2021. RTC staff also recommends that the E&D TAC identify one or two areas to focus on addressing in 2021.**

## **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 2021 Unmet Paratransit and Transit Needs List* and recommends the Regional Transportation Commission adopt the *Final 2021 Unmet Paratransit and Transit Needs* list following a public hearing on May 6, 2021.

Attachment 1: *Draft 2021 Unmet Paratransit and Transit Needs List*

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## **2021 Final Draft 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, 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.
  - 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 the existing transit service area.



- Provide incentives for senior and social services and medical and social services providers to be located in existing transit service areas.
  - Support programs that encourage ridesharing to destinations popular with seniors or high concentrations of seniors.
  - 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. **H1** - 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** - Wheel chair accessible vehicles for taxis and transportation network company services
- Monitor the Transportation Network Company (TNC) Access for All program.
  - Evaluate other comparable options to provide services (i.e new companies, subcontract with services equipped with wheelchair vehicles).
  - Provide on demand paratransit service.
7. **M1** - 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.
8. **H2M1** – Access to paratransit services on all holidays.
- Extend existing paratransit services to holidays.
  - Support taxi voucher programs.
9. **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.
10. **M1** - Free or low-cost paratransit options
- Provide funding for programs that provide discounted and free paratransit rides
  - Support programs that provide on-demand ADA accessible rides.
11. **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.
  - 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.
  - Establish feeder services to inter-regional accessible transit services.



12. **M1** - 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.
13. **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, medical facilities, and senior activity centers.
  - Support continuous funding for transportation services to meal sites.
  - Provide transit and paratransit services to medical service centers.
  - Support volunteer drivers to provide transportation services.
14. **M2** - Conduct targeted outreach to seniors, people living with disabilities, and transportation service providers 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 ("Mobility Trainer" and "Bus by Choice" models)
  - Annual updates to transportation service providers including, but not limited to, providers included in the Guide for Specialized Transportation about paratransit service options.
15. **L2** - 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.
16. **H2** - Volunteer drivers in Santa Cruz County particularly in south-county and San Lorenzo Valley.
  - Expand outreach efforts to recruit drivers and promote services.
  - Support for the Volunteer Center Transportation Program.



17. **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.
18. **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.
19. **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.
20. **L12** - Specialized transportation for 'same day' low cost non-medical trips.
  - Expand taxi voucher program.
  - Support "on-call" volunteer drive programs.
21. **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.
22. **M1** - Provide increased UCSC on-campus paratransit service between campus to campus destinations.
  - Increase existing UCSC specialized transportation services to supplement increased demand.

### **Paratransit/Specialized Transportation Capital**

23. **H1** - ParaCruz operating facilities.
  - Acquire and develop permanent operations and maintenance facility for ParaCruz to reduce operating cost.
  - Increase funding opportunities for paratransit capital projects.



24. **M2** - 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.
25. **H2** - Paratransit vehicle replacements.
- Increase funding opportunities for paratransit capital projects including funding for electric vehicles and/or zero emission vehicles.
  - Take measures to include electric vehicles as option for purchase in the Section 5310 grant program.
26. **H2M1** – Electric Vehicle Charging Stations
- Support funding for electric vehicle charging infrastructure.

### **Transit Services**

27. **H1** – Greater frequency and span of transit service in densely populated areas with a mix of land uses.
- Increase service level between downtown Santa Cruz and Capitola Mall Transit Center through the Live Oak corridor.
  - Enhance service on Mission Street.
  - Extend transit service hours later in the evening and early in the morning serving Cabrillo College and commercial centers of Santa Cruz/Live Oak/ Watsonville.
  - Enhance service to employment entities.
  - Enhance service on Scotts Valley Drive.
28. **H1** – Greater evening frequency and span of transit service in coverage-oriented areas, in keeping with METRO service standards.
- San Lorenzo Valley Route 35 variants (Mt. Store and Country Club)
  - Local Watsonville services
  - La Selva Beach
29. **M1** – More transit service to UCSC.
- Increase weekend and weekday UCSC service.
  - Increase service to UCSC campus.
  - Increase service to the University of Santa Cruz employment center in Scotts Valley.
30. **H1** - 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.
  - Support for an integrated transit network, which includes transit services on a dedicated transit facility on the rail right-of-way consistent with the Unified Corridor Investment Study.
  - Provide transit service from San Lorenzo Valley to Los Gatos.
  - Provide direct transit connection between Live Oak and San Jose Diridon Station.
31. **M1** – Free and low-cost transportation options, including fixed-route transit services.
- 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.
32. **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. Soquel Ave/Drive \ to coastal communities).
  - Support for an integrated transit network, which includes transit services on a dedicated transit facility on the rail right-of-way consistent with Unified Corridor Investment Study.
  - Provide single trip service.
33. **M2** - More transit service to facilities providing medical, health and other social services.
- Provide transit service to medical facilities.
  - Provide medical, health, and social services within the existing transit service area.
34. **M2** - Access to transportation services on all holidays.
- Provide regular Santa Cruz Metro service on holidays.
  - Support taxi voucher programs.
  - Support volunteer transportation services.
35. **M2** - Easier and faster transit trips system wide.
- Enhance connections through increasing the span and frequency of service.
36. **M2** - Faster run times on transit routes.



- Investigate opportunities for transit priority lanes and signal priority.
  - Pursue right turn pockets for bypass lanes for buses service and transit priority on Soquel Ave/Drive and Freedom consistent with the Unified Corridor Investment Study.
  - Consider direct services between more locations, reducing need for transfers.
37. **M2** - Intra-community service in Santa Cruz County communities.
- Develop San Lorenzo Valley circulator.
  - Develop Scotts Valley circulator.
  - Investigate need for intra-community and neighborhood transit services
  - Consider partnerships with ride-hail and/or taxi services for first/last mile connections.
38. **L2** - Transit service to major tourist destinations.
- Provide transit service to Waddell Creek and North Coast and Highway 17 direct service to Boardwalk on weekends.
39. **L2** - Commuter transit service.
- Extend Highway 17 service to Watsonville, or improve connections between Watsonville-Santa Cruz service and Highway 17 service.
  - Provide faster commute option for transit riders between SLV and Santa Cruz.
40. **L3** - Special event services.
- Establish program to coordinate with Santa Cruz Visitor Center and partner agencies to provide special event services.

### **Transit Capital**

41. **M1** – 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).
  - Provide the ability to lower the height of braille for wheelchair access.
  - Provide benches and increased lighting at bus stops and connecting crosswalks.
42. **M1** – Maintenance of existing transit facilities.



- Support funding for maintenance of bus stops, parking lots, transit centers, buildings.
43. **H1** – Bus replacement: Replace buses beyond useful life as needed including buses, including buses providing rural service.
- Support funding for transit capital improvements.
  - Support funding for electric vehicle bus replacements and electric vehicle charging stations.
44. **H1** - Transit station improvements.
- Investigate options for renovation or redevelopment of Santa Cruz Metro Center.
  - Coordinate improvements to Capitola Transit Center with Capitola Mall ownership.
45. **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.
  - Support and seek funding for bus on shoulder on Highway 1.
46. **H1** – Dedicated transit facilities.
- Right-of-way improvements and stations along Santa Cruz Branch Rail Line if a bus rapid transit (BRT) or rail service is developed consistent with the Unified Corridor Investment Study.
  - Multimodal transfer facilities at stations along the Santa Cruz Branch Rail Line if BRT or rail service is developed.
47. **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 (APC) system to make mandatory reporting more efficient and improve data for service planning.
  - Install audio and video surveillance system for all buses.
  - Install audio and video surveillance system for all buses
  - Electronic fare payment for more convenient payment options and to speed up boarding.
  - Modernize planning and scheduling software for more efficient service planning and better community outreach.
48. **M3** – More multimodal connections to transit.



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

49. **M3** - Wifi expansion on buses.

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

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**TO:** Elderly and Disabled Transportation Advisory Committee (E&D TAC)

**FROM:** Veronica Elsea, E&D TAC Chair

**RE:** Oral update on Draft Business Plan for Electric Passenger Rail on the Santa Cruz Branch Rail Line

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## **RECOMMENDATIONS**

E&D TAC Chair recommends that the E&D TAC receive an oral update and consider providing recommendations on the Draft Business Plan for Electric Passenger Rail on the Santa Cruz Branch Rail Line to the RTC.

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## **BACKGROUND**

In February, the Regional Transportation Commission (RTC) accepted the Transit Corridor Alternatives Analysis and Rail Network Integration Study (TCAA/RNIS) that selects Electric Passenger Rail as the locally preferred alternative on the Santa Cruz Branch Rail Line (SCBRL). The Business Plan was developed in order to provide a guiding document for potential funding and implementation of electric passenger rail. The 25-year Business Plan includes cost estimation, an implementation plan, a project financing and revenue plan, a funding strategy including a cash flow analysis, and risk identification and mitigation factors.

RTC staff presented the draft Business Plan for Electric Passenger Rail on the Santa Cruz Branch Rail Line and received public input at the April 1, 2021 RTC meeting. The RTC considered a motion to accept the business plan and seek funding for an environmental document which failed on a 6-6 vote. The RTC directed staff to return to the next meeting on May 6, 2021 with options for producing a final report for compliance with the Rail Network Integration Study grant.

## **DISCUSSION**

At the E&D TAC meeting on November 17, 2020 the E&D TAC received a presentation on the Transit Corridor Alternatives Analysis and Rail Network Integration Study – Performance Measure Analysis and Proposed Locally Preferred Alternative. The committee made a motion to prioritize clean fuel rail transit options on the Santa Cruz Branch Rail Line.

**E&D TAC Chair recommends that the E&D TAC receive an oral update and consider providing recommendations on the Draft Business Plan for Electric Passenger Rail on the SCBRL to the RTC.**



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

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## **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.

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## **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 13 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.**



## **MEMORANDUM**

**TO:** SCCRTC Elderly and Disabled Transportation Advisory Committee

**FROM:** Miranda Taylor, Planner

**SUBJECT:** 2021 Title VI Plan Development Process

**MEETING DATE:** April 13, 2021

### **RECOMMENDATION:**

Staff will provide E&D TAC members with an overview of the 2021 Title VI Plan development process. E&D TAC members are asked to provide feedback on the development of the Draft 2021 Title VI Plan.

### **BACKGROUND:**

Title VI is a Federal statute that mandates that no person shall, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance. The Federally required 2021 Title VI Plan is a comprehensive document that guides AMBAG in the Title VI process. AMBAG receives Federal funding through Caltrans and therefore is subject to this Federal requirement.

In 2012, the Federal Transit Administration set new guidelines for Caltrans requiring sub-recipients of Caltrans Planning Grants to submit a Title VI Plan to FTA every three years. AMBAG, as a sub-recipient of such funds and as the federally designated Metropolitan Planning Organization (MPO) for the Monterey Bay Region, must prepare and adopt a Title VI Plan at least once every three years. The 2021 Title VI Plan will cover the three-year period from 2021-2024 and must comply with FTA Circular 4702.1B. The 2021 Title VI Plan emphasizes the AMBAG Title VI process and procedures, including the use of public outreach techniques and innovative strategies to specifically include Limited English Proficiency (LEP) Populations within the region.

### **DISCUSSION:**



The requirements for the 2021 Title VI Plan under FTA Circular 4702.1B incorporate environmental justice principles into plans, projects, and activities that receive funding from FTA. The following guiding environmental justice principles must be considered through “all public outreach and participation efforts conducted by the FTA, its grantees and sub-grantees”:

- To avoid, minimize, or mitigate disproportionately high and adverse human health and environmental effects, including social and economic effects, on minority populations and low income populations.
- To ensure the full and fair participation by all potentially affected communities in the transportation decision making process, and to prevent the denial of, reduction in, or significant delay in the receipt of benefits by minority and low income populations.

A Title VI Plan is the required guide for all Title VI related activities conducted by AMBAG. As such, this plan will contain the procedures, strategies and techniques that will be used by AMBAG for increasing public involvement in all programs and projects that use Federal funds and creating a more inclusive public participation process for LEP Populations.

Below are key dates for developing the 2021 Title VI Plan:

- **February – March 2021:** Present an overview of the 2021 Title VI Plan development process
- **April – May 2021:** Develop the Draft 2021 Title VI/LEP Plan
- **June 2021:** Present the Draft 2021 Title VI Plan to Technical Advisory Committees and to the AMBAG Board of Directors
- **June 10- July 9, 2021:** 30-Day Public Comment Period
- **July 2021:** Prepare the Final 2021 Title VI Plan
- **August 11, 2021:** AMBAG Board of Directors will be asked to adopt the Final 2021 Title VI Plan

#### **ATTACHMENTS:**

1. 2021 Title VI Plan Draft Outline
2. Appendix E: 2021 LEP Draft Outline



## **AMBAG 2021 Title VI Plan Draft Outline**

### **I. Introduction**

- A. Background
- B. Governing Legislation
- C. Regional Roles and Responsibilities

### **II. Demographic Profile-Mobility Needs Identified**

- A. Utilize U.S. Census Data to identify the total number and percentage of the population of every city and county by race within the AMBAG region

### **III. AMBAG Title VI Policy Statement**

### **IV. Title VI Responsibilities**

- A. MPO Responsibilities
- B. DOT Title VI Plan Checklist

### **V. Title VI Plan Timeline and Planning Process**

### **VI. Public Participation Plan**

### **Appendices**

Appendix A: Title VI Assurances

Appendix B: AMBAG Title VI Notice to the Public

Appendix C: AMBAG Title VI Complaint Procedures

Appendix D: AMBAG Title VI Complaint Form

**Appendix E: AMBAG 2021 LEP Plan (Please refer to Attachment 2 for Detailed LEP Draft Outline)**

Appendix F: Title VI Program Approval

### **Figures**

Figure 1-1: AMBAG Region Map

Figure 2-1: Demographic Mobility Needs Graph

Figure 2-2: Demographic Mobility Needs Graph: Hispanic/Latino Only

Figure 5-1: Title VI Plan Timeline



## **Appendix E: AMBAG 2021 LEP Draft Outline**

### **I. LEP Plan Overview**

### **II. Determination of Need**

#### **A. US DOT Four Factor Analysis of LEP Plan**

1. The number or proportion of LEP persons eligible to be served or likely to be encountered by the program or recipient.
2. The frequency with which LEP persons come into contact with the program.
3. The nature and importance of the program, activity, or service provided by the program to people's lives.
4. The resources available to the recipient for LEP outreach, as well as the costs associated with that outreach.

### **III. LEP Outreach Strategies**

- A. Public notices and notifications (flyers, notifications and Title VI complaint procedures in accessible areas offered in multiple languages)

### **IV. Data Collection Methods**

- A. The number or proportion of LEP persons eligible to be served or likely to be encountered by the program or recipient.

1. We will utilize ACS data for people who speak English "less than very well" (considered LEP persons) – LEP Households, 5 Year Estimates

- B. The resources available to the recipient for LEP outreach, as well as the costs associated with that outreach.

1. Providing translation services in public meetings
2. Language Assistance Measures
3. Cost of future services to implement Title VI Plan

### **V. Findings and Recommendations**

### **Figures**

Figure 2-1: LEP Households Map: AMBAG Region

Figure 2-2: LEP Households Map: Santa Cruz County

Figure 2-3: LEP Households Map: San Benito County

Figure 2-4: LEP Households Map: Monterey County



Date	First Name	Last Name	Location	Cross Street	City	Category	Additional Comments	Forwarded to	Forwarded Date	Response
03/10/21	Sue Ellen	Gales	1145 Morrissey Blvd	Park Way	Santa Cruz	Ped: Plant overgrowth or interference, Debris on shoulder or bikeway, Debris on sidewalk	The sidewalk on Morrissey Blvd nearer Delaveaga School is overgrown with thick vines that impede walking on the sidewalk. I have called the City of Santa Cruz several times to please trim... no response. My Dad, 89 yrs young walks this sidewalk every day and the safety is being compromised by unkept vines. Location is just up from the intersection of Morrissey @ Park Way near the bend in the road. Thank you for your service.	Claire Gallogly, Nathan Nguyen	03/12/21	<b>3/10/21 Claire Gallogly:</b> Good morning, Staff will go field check the location to being the remedy.
02/16/21	Carla	Braden	501 Broadway	Ocean St	Santa Cruz	Ped: Traffic signal problem	At Ocean and Broadway, from the corner of Ocean Animal Clinic, walk signals were not working in either direction (crossing over Ocean or Broadway) when I needed to cross today. I waited through 3 lights and finally had to walk into the crosswalk while drivers were turning into it. The sidewalk is often closed farther down on Ocean toward Barson St because of the building construction, which necessitates crossing Ocean and then crossing back over at Barson, or walking in the traffic lane on Ocean which is even less safe with a dog. I would think this will be particularly dangerous in the dark.	Claire Gallogly, Nathan Nguyen	02/19/21	<b>2/22/21 Dan Estranero:</b> Our traffic signal operations crew checked on the pedestrian signals at Ocean/Broadway and said they are functional.
02/10/21	Araceli	Serrano	Cave Gulch Trailhead	Empire Grade	Santa Cruz	Ped: Lighting problem, No crosswalk or striping	There is striping on the road to signal a crosswalk but there are no road signs or lights to cross safely. It is down a hill and around a bend, as well, so cars drive fast and can't see any pedestrians until it is potentially too late. I've walked through here many times and have never felt safe doing so.	DPW	02/12/21	<b>2/12/21 Jana Vargas:</b> Good morning, Thank you for your email. I will forward your request to our Traffic Division for review and response.
02/05/21	Debbie	Bulger	Mission St	Center St	Santa Cruz	Ped: Other	A stop bar is needed in this location to keep drivers from blocking the marked crosswalk. This situation happens repeatedly. I would guess 75% of the time or more.  I am EXTREMELY UNCOMFORTABLE having to walk in front of such a driver.	Claire Gallogly, Nathan Nguyen	02/08/21	<b>3/3/21 Chris Shneiter:</b> We'll put a work order to get it done.
01/26/21	Julie	McLaren	23430 Sunset Dr	Evergreen Ln	Los Gatos	Ped: Plant overgrowth or interference	The eucalyptus tree is near where there are several orange warning cones for the recent digging work done by the VDM water company. On the Sunset Dr side of the corner into Evergreen Lane. House belongs to the Sterner family I believe. Dead limb lower down is easily visible but there are 1-2 more larger branches, one is possibly the main leader, snapped off above that one. This is very likely to come down in high winds today/tonight.	DPW	02/08/21	<b>2/9/21 Jana Vargas:</b> Good afternoon, Thank you for your email. I will forward your request to our Road Maintenance Department for review and response.



Date	First Name	Last Name	Location	Cross Street	City	Category	Additional Comments	Forwarded to	Forwarded Date	Response
01/26/21	Justin	Hammergren	2069 Dolphin Dr	Penasquitas Dr	Aptos	Ped: N/A	Not a through street sign post rotted out and fell corner of property	DPW	02/01/21	<b>2/1/21 Jana Vargas:</b> Good afternoon, Thank you for your email. I will forward your request to our Road Maintenance Department for review and response. <b>2/1/21 Road Maintenance Department:</b> This has been repaired.
01/25/21	Debbie	Bulger	638 Escalona Dr	Walnut Ave	Santa Cruz	Ped: Vehicles or objects blocking sidewalk, Lack of wheelchair access	638 Escalona Drive Homeowner is blocking ADA access around utility pole by storing trash and recycling cans there.	Claire Gallogly, Nathan Nguyen	02/01/21	<b>2/11/21 Nathan Nguyen:</b> City staff will send a letter of encroachment.