



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, May 10, 2022**

**NOTE: TELECONFERENCE**

Join the online meeting to see presentations:

<https://us02web.zoom.us/j/84888935098>

**Meeting ID: 848 8893 5098**

**Dial by your location: +1 669 900 9128 US**

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).

Due to precautions associated with COVID-19, and following current state law (AB 361) regarding the Brown Act, all RTC and committee meetings until further notice will be held by teleconference only. Members of the public can listen and participate in meetings over the phone and through the internet.

- 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 April 12, 2022— pg. 4**
- 6. Receive RTC Meeting Highlights— pg. 9**
- 7. Receive Information Items— pg. 12**
  - a) Central Coast ZEV Strategy Flyer**
- 8. FY 22/23 TDA Funding Request for the Community Traffic Safety Coalition and the Ride N Stride Program— pg. 13**

### **REGULAR AGENDA**

- 9. 1:55 pm — Receive Program Updates— pg. 49**
  - a. Volunteer Center
  - b. Community Bridges – TDA 2nd Quarter Summary Report
  - c. Santa Cruz Metro
  - d. SCCRTC
  - e. Pedestrian Ad-hoc Subcommittee
    - i. Pedestrian Hazard Report
- 10. FY 2022-23 Transportation Development Act Funds for Community Bridges Lift Line Paratransit Program— pg. 53**
- 11. FY 2022-23 Transportation Development Act Funds for the Santa Cruz Metropolitan Transit District— pg. 79**
- 12. FY 2022-23 Transportation Development Act Funds for Volunteer Center— pg. 106**
- 13. Measure D: Community Bridges/Lift Line Five-Year Plan— pg. 127**
- 14. 2022 Coordinated Public Transit-Human Services Transportation Plan Development Process— pg. 133**
- 15. The Draft County of Santa Cruz General Plan Sustainability Update— pg. 138**
- 16. 3:30 pm — Adjourn**

**Next meeting: 1:30 pm, August 9, 2022. Location is to be determined.**

**HOW TO REACH US**

*Santa Cruz County Regional Transportation Commission  
1101 Pacific Avenue. Suite 250,  
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.*



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, April 12, 2022**

**NOTE: Meeting was held as teleconference**

1. Roll call

The meeting was called to order at 1:35 p.m.

***Members present:***

Tara Ireland, Social Service Provider-Persons of Limited Means  
Jesus Bojorquez, CTSA (Lift Line)  
Eileen Wagley, SCMTD (Metro)  
Michael Pisano, Potential transit User (60+)  
Janet Edwards, 1st District  
Veronica Elsea, 3rd District  
Nadia Noriega, CTSA (Lift Line)

***Unexcused absences:***

Alex Weske, Social Service Provider – Disabled  
Paul Elerick, 2<sup>nd</sup> District  
Martha Rubbo, 4<sup>th</sup> District  
Clay Kempf, Social Service Provider-Seniors  
Lisa Berkowitz, CTSA (Community Bridges)  
Caroline Lamb, Potential Transit User (Disabled)  
Ed Hutton, 5<sup>th</sup> District

***RTC staff present:***

Amanda Marino, Transportation Planner  
Grace Blakeslee, Senior Transportation Planner  
Sarah Christensen, Principal Engineer  
Guy Preston, Executive Director  
Brianna Goodman, Transportation Planner

***Others present:***

Patrice Theriot, City of Watsonville  
Rob Tidmore, County of Santa Cruz

Becky Steinbruner, Cabrillo Host Lions Club  
Barbara Chamberlin, Cabrillo Host Lions Club  
Tim Brattan, Grey Bears  
Johanna Lighthill, Member of the Public  
Daniel Young, Member of the Public  
Wondimu Mengistu, Santa Cruz METRO

2. Introductions
3. Oral communications

Committee member Janet Edwards provided information on City of Capitola's survey listing the number of people with disabilities and age of people living in Capitola posted in the April 14<sup>th</sup> City Council meeting.

Becky Steinbruner, member of the public, representing the Cabrillo Host Lions Club communicated information on the transportation element of the County of Santa Cruz Sustainability Update to the General Plan.

4. Additions or deletions to consent and regular agendas - none

### **CONSENT AGENDA**

5. Approved minutes from February 8, 2022

*A motion (Pisano/Edwards) was made to approve the minutes with corrections to item 19. The motion passed with members Tara Ireland, Jesus Bojorquez, Eileen Wagley, Michael Pisano, Janet Edwards, Veronica Elsea, Nadia Noriega voting in favor.*

6. Received RTC Meeting Highlights
7. Received 2022 E&D TAC Membership Roster
8. Received Information Items

- a. California Air Resources Board UCLA Center for Neighborhood Knowledge Transportation Disparities Mapping Tool User Guide
- b. Pediatric Disaster Surge Training Flyer

*A motion (Edwards/Bojorquez) was made to approve the consent agenda. The motion passed with members Tara Ireland, Jesus Bojorquez, Eileen Wagley, Michael Pisano, Janet Edwards, Veronica Elsea, Nadia Noriega*

*voting in favor.*

## **REGULAR AGENDA**

### **9. Received Program Updates**

#### **a. Volunteer Center – TDA Second Quarter Summary Report**

Tara Ireland communicated that there are no new program updates.

#### **b. Community Bridges**

Jesus Bojorquez informed the committee that Lift Line hired a new driver.

#### **c. Santa Cruz METRO**

Eileen Wagley announced that METRO is providing free transit and paratransit rides on April 22<sup>nd</sup> celebrating Earth Day. Additionally, Michael Tree, METRO's new General Manager, will start on April 21<sup>st</sup> and two new ParaCruz drivers were hired. More information on available positions can be found on Santa Cruz METRO's website.

#### **d. SCCRTC**

Amanda Marino, Transportation Planner, announced that the RTC applied to be an Access Fund Administrator for the TNC Access For All Program in Santa Cruz County.

Veronica Elsea, E&D TAC Chair, requested that we inform the committee of the next Budget Administration and Personnel Committee (BAP) meeting date at the next E&D TAC meeting.

#### **e. Pedestrian Ad-Hoc Subcommittee**

##### **i. Pedestrian Hazard Report**

Chair Veronica Elsea informed the committee that the subcommittee is continuing to monitor the Pedestrian Hazard Reports and responses. The subcommittee requested information from local jurisdictions on the process of working with developers to mitigate pedestrian safety issues. Ms. Elsea also thanked Gus Alfaro for working with the subcommittee as the Caltrans District 5 committee liaison. Mr. Alfaro is now working for the Clean California Program.

The subcommittee is additionally monitoring the update to the Santa Cruz County Wireless Communication Ordinance. The subcommittee is working to ensure that pedestrian pathways are not obstructed by the placement of new electrical boxes. This item is being considered

by the Santa Cruz County Board of Supervisors at their meeting on May 10<sup>th</sup>.

*A motion (Pisano/Edwards) was made for the Pedestrian Ad-hoc Subcommittee to write a letter to the Santa Cruz County Board of Supervisors on behalf of the E&D TAC to ensure accessible pedestrian pathways in the update of the Santa Cruz County Wireless Communication Ordinance. The motion passed with members Tara Ireland, Jesus Bojorquez, Eileen Wagley, Michael Pisano, Janet Edwards, Veronica Elsea, Nadia Noriega voting in favor.*

#### 10. Chair and Vice Chair Elections

*A motion (Pisano/Edwards) was made to elect Veronica Elsea as Chair for a two-year term. The motion passed with members Tara Ireland, Jesus Bojorquez, Eileen Wagley, Michael Pisano, Janet Edwards, Veronica Elsea, Nadia Noriega voting in favor.*

*A motion (Edwards/Bojorquez) was made to elect Janet Edwards as Vice Chair for a two-year term. The motion passed with members Tara Ireland, Jesus Bojorquez, Eileen Wagley, Michael Pisano, Janet Edwards, Veronica Elsea, Nadia Noriega voting in favor.*

#### 11. Draft 2022 Unmet Transit and Paratransit Needs List

Veronica Elsea, E&D TAC Chair, and Amanda Marino, Transportation Planner, explained that annually the E&D TAC prepares the Unmet Transit and Paratransit Needs List to identify unmet transportation needs of seniors and people with disabilities and/or limited means to provide a useful tool to access and prioritize needs in the region. The E&D TAC considered the Preliminary Draft 2022 Unmet Paratransit and Transit Needs List at their February 8, 2022 meeting. Revisions from the Preliminary Draft to the Draft are shown using underline and strikeout and reflect recommendations made by the E&D TAC, input from members of the public, partner agencies, and RTC staff. Committee members and members of the public are encouraged to provide comments using the [online form](#) or by emailing [amarino@sccrtc.org](mailto:amarino@sccrtc.org).

*A motion (Edwards/ Bojorquez) was made to approve the Final Draft 2022 Unmet Transit and Paratransit Needs List, and forward the list to the RTC for their consideration on May 5, 2022 with amendments as needed following the public hearing. The motion passed with members Tara Ireland, Jesus Bojorquez, Eileen Wagley, Michael Pisano, Janet Edwards, Veronica Elsea, Nadia Noriega voting in favor.*

## 12. Coastal Rail Trail Segments 8 through 12 Schematic Plans

RTC Senior Transportation Planner Grace Blakeslee, County of Santa Cruz Project Manager Rob Tidmore, and RTC Principal Engineer Sarah Christensen presented the schematic plans for Coastal Rail Trail Segments 8 & 9 (Pacific Avenue to 17th), Segments 10 & 11 (17th to State Park Drive) and Segment 12 (State Park Drive to Rio Del Mar Boulevard). The committee provided comments and questions regarding topics related to ADA accessibility, trail width, trail connections, and trail crossings.

*No action taken.*

## 13. Measure D Active Transportation- Monterey Bay Sanctuary Scenic Trail Network (MBSST)/Coastal Rail Trail Five-Year Program of Projects

Grace Blakeslee, Senior Transportation Planner, gave an overview of the options and priorities for Measure D Active Transportation funds through FY26/27 (MBSST 5-Year Plan). This includes staff recommending allocating funding to Segments 8 & 9, Segments 10 & 11, Segment 12, and rail corridor maintenance, encroachments, planning and oversight.

*No action taken.*

## 14. City of Watsonville, Freedom Blvd. Reconstruction Project

Patrice Theriot, City of Watsonville Public Works Principal Engineer shared the Freedom Blvd. reconstruction plans with the committee identifying pedestrian accessibility improvements including updating curb ramps, crosswalks, traffic signals, and pedestrian actuated signals with audible countdowns.

*No action taken.*

Meeting adjourned at approximately 4:00 pm.

The next E&D TAC meeting is scheduled for Tuesday, March 10, 2022 at 1:30 p.m. 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) April 7, 2022 Meeting Highlights**

### **RTC Amends FY 2021-22 Budget to Increase Funding for SC METRO, Lift Line and Local Jurisdictions**

The Commission increased the amount of FY 2021-22 Transportation Development Act (TDA) funds apportioned to Santa Cruz METRO, Lift Line, the Volunteer Center and local public works departments. Traditionally, when the RTC receives higher TDA revenues than forecasted, the extra revenues are distributed to recipients in the following fiscal year. For FY 2021-22, the RTC decided to provide these revenues to the recipients sooner. An additional \$1,124,444 will be provided to SC METRO for local transit service, an additional \$123,623 to Community Bridges/Lift Line and the Volunteer Center for specialized transportation services, and an additional \$67,092 to local public works departments for bicycle and pedestrian projects.

### **Director's Report**

Executive Director Guy Preston announced that the RTC received \$786,800 in funding from Caltrans for two Sustainable Transportation Planning Grants for projects that will focus on climate adaptation and transportation equity in Santa Cruz County. With \$448,800 of the grant funds, the RTC and the County of Santa Cruz will partner to develop the Climate Adaptation Vulnerability Assessment and Transportation Priorities Report for unincorporated Santa Cruz County maintained roads and the Santa Cruz Branch Rail Line. The emphasis of the vulnerability assessment will be on identifying vulnerable transportation infrastructure and the associated hazards such as wildfire, mud debris flows, extreme weather/flooding, and sea-level rise. The RTC will use \$338,000 of the grant funds to develop a Santa Cruz County Transportation Equity Action Plan to address transportation equity and other transportation disparities in the community.

### **Measure D Potential Financing Options Presentation**

The Commission received a presentation on the development of Measure D funding and borrowing options for Measure D projects and programs. RTC staff is currently evaluating funding options and strategies to accelerate the delivery of priority regional projects under the Measure D Expenditure Plan for the highway and active transportation investment categories. If the RTC, the City of Santa Cruz, and the County of Santa Cruz are successful in securing grant funding in the short term, it is anticipated that the RTC would need to finance (such as issuing sales tax revenue bonds) to help fund the local match, which is needed to leverage the grant funds. Over the next couple of months, staff will develop a cash flow model to determine the potential timing and amount of borrowing capability.

## Go Santa Cruz County Program Update

The Commission received an update on the RTC's Cruz511 and GO Santa Cruz County programs. The commission also amended the existing agreement with the RTC's commute management platform for continued use of the GO Santa Cruz County online platform. The RTC offers transportation demand management services under the Cruz511 program and encourages travelers to maximize the efficiency of the existing transportation system by providing information and resources to choose sustainable modes of transportation. Additionally, Cruz511 offers ride matching and trip planning through the [GO Santa Cruz County](#) online platform and provides incentives and cash rewards to commuters for choosing sustainable commute options. There are 2,669 participants enrolled in the GO Santa Cruz County program as of March 2022. Since the countywide expansion in April 2021, more than 1,500 new users have joined. Since the platform was first made available in August 2019, all participants have logged more than 49,000 walk, bike, carpool, vanpool, transit, and telecommute trips, saving an estimated \$96,000 in direct commuting costs. By choosing not to drive alone, participants saved more than 73 metric tons of carbon dioxide emissions from being released into the atmosphere, which is the equivalent of 16 gas powered vehicles driven for one year.

## Fiscal Year 2022-23 Proposed Budget

At the beginning of each calendar year, staff prepares a proposed RTC budget for the following fiscal year. The FY2022-23 budget proposed for RTC and Measure D reflects the most recent revenue projections from the Santa Cruz County Auditor for TDA funds, State Controller's Office of California for State Transit Assistance (STA) funds, and consultant Hinderliter de Llamas for Measure D funds. The FY2022-23 budget includes continued delivery of ongoing RTC projects and programs, and implementation of Measure D. The Commission approved the proposed FY2022-23 budget, established Section 115 trusts with CalPERS for pension and other post-employment benefits, and accepted Transportation Development Act and Measure D revenue forecast and estimates.

## Upcoming RTC and Committee Meetings

Due to precautions associated with COVID-19 (coronavirus), **all RTC and committee meetings have been held by video conference.** On September 16, 2021, Governor Newsom signed AB 361 which continues the Brown Act waivers and allows the RTC to continue Commission and committee meetings in a virtual format. The RTC will continue to hold its commission meetings in a virtual format until further notice. Please check the RTC website [<https://sccrtc.org/meetings/calendar/>] or call 460-3200 to confirm meeting and video conference information for future meetings. Agendas are posted to the website at least 3 days before the meeting and will also include attendance information. 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@scrtc.org](mailto:info@scrtc.org) or by calling 831-460-3200.

**Regional Transportation Commission Meeting**

Thursday, May 5, 2022, 9:00 a.m.

**Bicycle Advisory Committee**

Monday, April 11, 2022, 6:00 p.m.

**Elderly & Disabled Transportation Advisory Committee**

Tuesday, April 12, 2022, 1:30 p.m.

**Budget, Administration & Personnel Committee Meeting**

Thursday, April 14, 2022, 1:30 p.m.

**Transportation Policy Workshop**

Thursday, April 21, 2022, 9:00 a.m.

**Interagency Technical Advisory Committee**

Thursday, April 21, 2022, 1:30 p.m.

*Public input on transportation issues is welcomed and encouraged. For more information, visit the SCCRTC website at [www.scrtc.org](http://www.scrtc.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*







**Help develop a new strategy to improve electric vehicle (EV) charging infrastructure to support interregional travelers, freight and transit throughout Santa Barbara, San Luis Obispo, Monterey, Santa Cruz, San Benito, and Ventura counties.**



Key goals include ensuring access to EV charging for low-income households, multi-family dwellings and rental properties as well as other disadvantaged communities, including Native American Tribal Governments, and rural communities.

If you drive an Electric Vehicles or expect to in the future, this is your chance to make suggestions to guide the region's future charging infrastructure, by answering:

-  **WHERE DO YOU WANT TO CHARGE?**
-  **HOW OFTEN DO YOU EXPECT TO CHARGE THERE?**
-  **HOW MANY CHARGERS DO YOU THINK WILL BE NEEDED?**
-  **DO YOU PLAN TO EAT, DRINK OR SHOP WHILE CHARGING YOUR EV?**

**WE NEED  
YOUR INPUT!**



**Visit:** <https://dks.mysocialpinpoint.com/central-coast-zev-strategy-plan#/>



In addition, we will be holding **a series of virtual workshops and presentations** to receive input from partners and the public throughout the study. You are welcome to share your ideas and thoughts! **Please contact:** Maya Kulkarni, *Transportation Planner with SBCAG*, at [mkulkarni@sbcag.org](mailto:mkulkarni@sbcag.org).

*This project is sponsored by Santa Barbara County Association of Governments (SBCAG) with support from numerous other local and regional agencies including San Luis Obispo Council of Governments (SLOCOG), Association of Monterey Bay Area Governments (AMBAG), Transportation Agency for Monterey County (TAMC), Santa Cruz County Regional Transportation Commission (SCCRTC), and Ventura County Transportation Commission (VCTC).*

**TO:** Elderly and Disabled Transportation Advisory Committee (E&D TAC)  
**FROM:** Tommy Travers, Transportation Planner  
**RE:** FY 22/23 TDA Funding Request for the Community Traffic Safety Coalition and the Ride N Stride Program

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## **RECOMMENDATIONS**

Staff recommends that the E&D TAC:

1. Review the attached FY 22/23 Community Traffic Safety Coalition (CTSC) and Ride N Stride Bicycle and Pedestrian School Education Program funding requests, work plans and budgets from the County Health Services Agency (HSA) ([Attachments 2 & 4](#)) and provide input; and
  2. Recommend that the Regional Transportation Commission approve \$156,000 in FY 22/23 Transportation Development Act funds.
- 

## **BACKGROUND**

Since FY 98/99, the Regional Transportation Commission has included \$50,000 in Transportation Development Act (TDA) funding for the Community Traffic Safety Coalition (CTSC), operated by the Santa Cruz County Health Services Agency (HSA).

Since FY 01/02, the Commission has also funded HSA's Ride N Stride Bicycle and Pedestrian School Education Program with TDA funds. In prior years, funding for this program came from the Congestion Mitigation and Air Quality Improvement Program and Commission reserves. The most recent budget increase was approved by RTC this year to fund the two programs with a combined \$156,000.

Per the agreement between the Commission and HSA for receipt of TDA funds, the Commission and Bicycle Advisory Committee have the opportunity to provide input or contingencies on funding or the work plan as part of any funding approval.

## **DISCUSSION**

The County HSA submitted a cover letter ([Attachment 1](#)) and two sets of FY 21/22 TDA claim forms, work plans and budgets for Bicycle Committee and Commission review and approval. The first work plan, claim form and budget are for the ongoing work of the Ride N Stride Bicycle and Pedestrian School Education Program ([Attachment 2](#)). This project includes staff costs to present lessons on bicycle and pedestrian safety to elementary school students. The FY 22/23 funding request for this program is \$78,000.

The second work plan, claim form and budget are for continuation of the CTSC including Vision Zero coordination ([Attachment 4](#)). The CTSC serves Santa Cruz County residents through efforts to prevent bicycle and pedestrian injuries and fatalities and increase the use of safe alternative modes of transportation. The CTSC coordinated the Vision Zero program for the city of Watsonville and continues to be closely involved with implementation of that plan, with the HSA providing staff support for the Watsonville Vision Zero Task Force. The CTSC has developed a Vision Zero Work Plan for coordination with other jurisdictions for future plans and occasionally meets with other jurisdictions.

Progress Reports for both programs for the January-June 2021 period are included ([Attachment 5](#)).

In total, the amount requested for the two programs does not exceed the \$156,000 currently available in the RTC budget. HSA will provide a total of \$204,000 in matching funds to the requested allocation, including in-kind contributions.

Funding the programs will be accomplished in three steps: 1) Inclusion in RTC budget for next fiscal year which is expected at the April 7, 2022 RTC meeting, 2) Bicycle Advisory Committee review and recommendation, and 3) RTC review and approval typically scheduled for the June RTC meeting.

The agreement between the RTC and County HSA for the CTSC and Ride N Stride programs includes annual review, feedback and comment by the Commission on their respective work plans as part of the funding review and approval process.

## **SUMMARY**

Attached is a request from the Health Services Agency for TDA funding for the CTSC and the Ride N Stride Program for \$156,000 in FY 22/23. Staff recommends that the E&D TAC provide input and recommend approval of the requested amount to the Regional Transportation Commission, with \$78,000 going to the Community Traffic Safety Coalition and \$78,000 going to the Ride N Stride Program.

### Attachments:

1. Letter from Corrine Hyland, Health Services Manager
2. Ride N Stride claim form and work plan
3. CTSC claim form and work plan
4. Ride N Stride & CTSC FY 22/23 budgets
5. Ride N Stride & CTSC Jan-June 2021 Progress Reports

# COMMUNITY TRAFFIC SAFETY COALITION



April 1, 2022

Guy Preston, Executive Director  
Santa Cruz County Regional Transportation Commission  
1523 Pacific Avenue  
Santa Cruz, CA 95060-3911

**Regarding: FY 2022-2023 TDA Request for the Community Traffic Safety Coalition (CTSC) and Ride n' Stride programs**

Dear Mr. Preston:

The Santa Cruz County Health Services Agency (HSA) provides Safe & Active Transportation programming through its CTSC and Ride n' Stride programs. CTSC's mission is to prevent traffic-related injuries and fatalities for all road users, with a focus on people bicycling and walking. The CTSC has developed a new two-year work plan for fiscal years 2022-2024 that supports current Vision Zero cities, Watsonville and Santa Cruz, and strives to bring Vision Zero to other jurisdictions in the county with an aim to eliminate all traffic related fatalities and serious injuries. The CTSC envisions safe, accessible, and equitable transportation for all.

The Ride n' Stride program provides bicycle and pedestrian safety education to at least 2,000 elementary school students a year. In addition, Ride 'n Stride staff collaborate with Ecology Action's Walk Smart program to deliver critical pedestrian safety education in the schools. CTSC and Ride n' Stride program staff also work with school districts and agency partners to conduct outreach efforts and provide safety education and equipment, such as bicycle helmets, to low-income residents.

HSA is requesting \$78,000 to support staffing and project implementation for CTSC and the Vision Zero Work Plan and \$78,000 to support the Ride n' Stride school education program. HSA will provide at least \$102,000 in match for each program through other grant funding, HSA program management, fiscal and administrative support, and community in-kind contributions, for a total CTSC/Ride n' Stride budget of \$360,000 for FY 2022-23. As in the past two years, all TDA funds not used due to the COVID-19 pandemic will be rolled over to the next fiscal year for continued programming.

Enclosed you will find the Transportation Development Act (TDA) Local Transportation Funds Claim forms, work plans and budgets for each program. I attest to the accuracy of this claim and all its accompanying documentation. Every effort has been made to ensure that the CTSC and Ride n' Stride work plans reflect the needs and concerns of the community. Thank you for your consideration and continued support of our vision for safe, accessible, and equitable transportation for all.

Sincerely,

Corinne Hyland, MPH  
Health Services Manager  
Community Health Education  
County of Santa Cruz Health Services Agency  
(831) 454-7558 [corinne.hyland@santacruzcounty.us](mailto:corinne.hyland@santacruzcounty.us)



# 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: **Ride n' Stride** (Bike & Pedestrian Safety school-based education program of CTSC)
2. Implementing Agency: County of Santa Cruz Health Services Agency
3. Sponsoring Agency (if different) – must be a TDA Eligible Claimant: Santa Cruz County Regional Transportation Commission
4. Funding requested this claim: TDA– Local Transportation Funds (LTF) \$78,000.00  
STA (transit/paratransit only) \$ \_\_\_\_\_
5. Fiscal Year (FY) for which funds are claimed: FY 2022/2023
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 4 Public Transportation  
☐ Article 8 Specialized Transportation via city sponsor  
☐ Article 3 & 8 TDA Admin or Planning
7. Contact Person/Project Manager  
Name: Theresia Rogerson  
Telephone Number: (831) 454-4312 E-mail: [theresia.rogerson@santacruzcounty.us](mailto:theresia.rogerson@santacruzcounty.us)  
  
Secondary Contact (in event primary not available): Corinne Hyland  
Telephone Number: (831) 454-7558 E-mail: [corinne.hyland@santacruzcounty.us](mailto:corinne.hyland@santacruzcounty.us)
8. Project/Program Description/Scope (use additional pages, if needed, to provide details such as work elements/tasks):  
See attached **Ride n' Stride Education Work Plan for FY 2022-23**
9. Project Location/Limits (attach a map and/or photos if available/applicable, include street names): All projects are countywide and education presentations are available for every elementary school.
10. Justification for the project. (Why is this project needed? Primary goal/purpose of the project; problem to be addressed; project benefits; importance to the community) The Ride n' Stride program provides school-based education and encouragement with the goal of increased bike and pedestrian safety practices among youth. Ride n' Stride increases student confidence in using active modes of transportation in the community. Program staff are bilingual, enabling the program to be effective in reaching the county's diverse population of students and parents with key messages promoting the benefits of riding and walking. Program evaluations consistently show an increase in bike safety knowledge among students and high satisfaction levels among teachers.
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.): To measure program success, Ride n' Stride staff administer teacher



evaluations and pre/post-test for students to measure gains in knowledge. Please see attached Ride n' Stride Work Plan for full evaluation measures.

- 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): The program aims to reach 2,000 elementary school students through classroom presentations and approximately 500 more students and/or school community members through additional outreach and education programming.
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? Programmed into the 2040 RTP under project #CO50.
13. Impact(s) of project on other modes of travel, if any (ex. parking to be removed): Through traffic safety education, biking and walking encouragement, and provision of bicycle helmets, more students and parents will gain confidence and motivation to use active forms of transportation, thereby reducing the numbers of vehicle mode trips to and from school sites, as well as for other local trips.
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? \$180,000.00

Is project fully funded? No, funding is sought each year to match TDA funding.

What will TDA (and STA, if applicable) funds be used on (ex. operations, administration, brochures, engineering, construction)? TDA funds are used for personnel, travel and materials needed to implement the program. Please see attached Ride n' Stride Safety Program Budget for FY 2022-23.

15. Preferred Method and Schedule for TDA-LTF fund distribution *(see RTC Rules and Regulations for details and requirements. Note if funds are distributed in advance of use, agencies will be required to subsequently provide documentation of actual expenditures.):*
  - a. Bike/Ped: Cities/County: ☐ Up to 90% upon initiation of work OR ☐ 100% upon project completion  
HSA/BTW: ☐ Quarterly disbursement OR ☒ Semi-annual disbursement
  - 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: Budget (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? If yes, date RTC approved: Annually	Yes
<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: _____)	N/A

<b>D.</b> 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
<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?	N/A

**Bike/Ped (Article 8) Only**

17. Project Cost/Budget, including other funding sources, and Schedule: (complete "24a" or "24b")

- a. Capital Projects (Bicycle projects: Bicycle Advisory Committee or RTC must approve the final project design plans prior to construction; see RTC Rules & Regulations)

	Planning	Environmental	Design/ Engineering	ROW	Construction	Other *	Contingency	Total
<b>SCHEDULE (Month/Yr) Completion Date /</b>								
<b>Total Cost/Phase</b>								
<b>STDA Requested (this claim)</b>								
<b>Prior TDA:</b>								
<b>Source 3:</b>								
<b>Source 4:</b>								
<b>Unsecured/ additional need**</b>								

\*Please describe what is included in "Other":

- b. Non-Capital Projects – Cost/Schedule: List any tasks and amount per task for which TDA will be used. Can be substituted with alternate budget format.

Please see attached Ride n' Stride Safety Program Budget for FY 2022-23.

Work Element/Activity/ Task	SCHEDULE (Month/Yr)	Total Cost per Element	\$ TDA requested	\$ Source 2:	\$ Source 3:	\$ Source 4:
Administration /Overhead						
Activity 1:						
Activity 2:						
Activity 3:						
Activity 4:						
Ex. Consultants						

Ex. Materials						
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**SCMTD, CTSA, Bike to Work, HSA, Volunteer Center Only – PLEASE KEEP ANSWERS BRIEF**

**18. 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.
- 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:

Ride n' Stride staff continued to partner on Walk Smart with Ecology Action this past year, collaborating on promotion, scheduling, and delivery in the schools. Ride n' Stride continued to utilize existing or low-cost educational materials and program supplies, and program staff secured other sources of traffic safety funding for distribution of bicycle helmets, educational materials, and reflective items to participants. In addition, the program utilized in-kind donations of teacher and volunteer time to support the program. All program staff contributed to streamlining our process to promote the program and respond to community requests and inquiries. With new virtual and in-person delivery options, presentations can be catered to teacher and student needs with less travel and staff time accrued overall. Also, Ride n' Stride experienced reductions in personnel costs again this past year due to continued staff deployment to the COVID-19 pandemic response as well as staff vacancies and leaves of absence. This will mean the third year of unused TDA funding rollover will be requested for use in the next fiscal year. This rollover will be used to improve program curriculum, materials, and efficiencies. When possible, HSA uses TDA allocations from RTC to leverage additional funding and will focus this next year on reestablishing an adequate level of staffing to ensure continued success and benefits to the community through Ride n' Stride programming.

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

This next year Ride n' Stride staff plan to focus on further testing and refinement of grade level curriculum and program evaluation in both virtual and in-person formats for bicycle and pedestrian school education, including a hybrid model where students are in-person and staff are presenting to them virtually. Ride n' Stride will also aim to establish closer relationships with partner agencies and Helmet Fit Sites to expand our reach in community education and safety equipment distribution. Program staff will continue to be involved in local transportation planning and other traffic safety efforts, such as Vision Zero, providing a public health perspective at meetings and events. These efforts, combined with Ride n' Stride objectives, will encourage active transportation while increasing safety for all road users.

**20. 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)
- ☒ HSA/BTW: Bicycle Committee (Annually in April/May 2023); RTC (Biannually in January 2023 and July 2023)

**SCMTD, CTSA and Volunteer Center Only**

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

b. Does the project meet an unmet transit need from the most recently approved RTC Unmet Paratransit and Transit Needs List? Describe.

<sup>1</sup> If feasible, the quarterly TDA reports submitted by Community Bridges for Lift Line as the Consolidated Transportation Services Agency (CTSA) 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.

**CTSA and Volunteer Center (Article 8) Only**

22. Where appropriate, are these specialized transportation services coordinated with other transportation services, including METRO service? Describe.
23. 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
24. 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)

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

25. 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.

**SCMTD Only**

26. 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):

<b><i>Funds</i></b>	<b><i>Urbanized Service</i></b>	<b><i>Rural/Non-Urban Service</i></b> <i>(could use FTA 5311 application)</i>
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.*

27. 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).*

28. 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:

- 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 TDA Claims):**

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

### **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.

**PROOF OF EXPENDITURES:** Claimant acknowledges it is required to submit all expenditure backup as well as evidence of other funding used for project to RTC, to RTC's satisfaction, before receiving periodic disbursement or disbursement upon project completion.

**CERTIFIED FISCAL AUDIT:** Claimant certifies that it has submitted a satisfactory, independent fiscal audit, with the required certification statement, to SCCRTC 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). *This requirement does not apply to new transit operators nor Bike to Work or HSA claims submitted through the SCCRTC.*

Signature Courne Hyland Title: Senior Health Services Manager Date: 4/6/22

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## **Community Traffic Safety Coalition (CTSC) Ride n' Stride Education Work Plan FY 2022-2023**

The Ride n' Stride program aims to increase safe bicycling and walking knowledge among elementary school students throughout Santa Cruz County. Classroom bicycle and pedestrian safety presentations were adapted for virtual delivery during COVID-19 restrictions. The curriculum teaches basic active transportation safety to young students in preschools and K-5<sup>th</sup> grades. Interactive education sessions on bicycle and pedestrian safety (including other wheeled devices, such as scooters and skateboards) are designed to be age appropriate and are offered in English and/or Spanish.

A number of years ago Ride n' Stride assisted Ecology Action in development of Walk Smart, a program targeting second grade students that combines classroom presentations with the practical experience of a walking fieldtrip. To compliment classroom programming for both Ride n' Stride and Walk Smart, previously developed activity packets for teachers align with California Common Core standards and reinforce traffic safety messages. The packets are geared for 2<sup>nd</sup>/3<sup>rd</sup> grade for pedestrian safety education and 5<sup>th</sup> grade classrooms for bicycle safety education. Moving forward this year, Ride n' Stride will offer programming to second grade classrooms not receiving Walk Smart as well as all other elementary school grade levels.

Ride n' Stride encourages students to be role models of safe riding and walking for their friends, siblings and parents. In addition to engaging the students and teachers, Ride n' Stride staff also conduct outreach to parents/caregivers and the broader school communities. The combined outreach and education components are listed below and work towards a vision of safe and active transportation for all our youngest community members.

### ***FY 2022-23 Work Plan Objectives and Activities:***

- ❑ Conduct bicycle and pedestrian safety education sessions for at least 2,000 elementary school and pre-school students in Santa Cruz County school districts, including distribution of supplemental resources, such as activity packets/books.
- ❑ Conduct at least 4 traffic safety presentations to parents and caregivers through schools, community agencies and neighborhood groups to promote safe bicycling and walking.
- ❑ Participate in at least 3 school or community events to provide traffic safety information and promote safe bicycling and walking.
- ❑ Work with the Community Traffic Safety Coalition (CTSC), Helmet Fit Sites, and community partners to coordinate distribution and proper fitting of at least 200 bike helmets to students and other community members.
- ❑ Further develop elementary school bilingual curriculum based on grade level, in both virtual and in-person formats, including student and teacher resources and child-to-adult interventions.
- ❑ Participate in the fall and spring Bike/Walk to School events, bike rodeos, walking field trips, and other bike/pedestrian safety activities, as staff time permits.
- ❑ Participate in traffic safety meetings, such as the CTSC, Watsonville Vision Zero Task Force, as staffing capacity and other program priorities allow.
- ❑ Further develop program evaluations for teachers and pre/post-tests for students, in both virtual and in-person formats, and continue reporting bike and pedestrian observational survey results among children and youth if conducted.



# 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: **Community Traffic Safety Coalition (CTSC)**
2. Implementing Agency: County of Santa Cruz Health Services Agency
3. Sponsoring Agency (if different) – must be a TDA Eligible Claimant: Santa Cruz County Regional Transportation Commission
4. Funding requested this claim: TDA– Local Transportation Funds (LTF) \$78,000.00  
STA (transit/paratransit only) \$ \_\_\_\_\_
5. Fiscal Year (FY) for which funds are claimed: **FY 2022/2023**
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 4 Public Transportation  
☐ Article 8 Specialized Transportation via city sponsor  
☐ Article 3 & 8 TDA Admin or Planning
7. Contact Person/Project Manager  
Name: Theresia Rogerson  
Telephone Number: (831) 454-4312 E-mail: [theresia.rogerson@santacruzcounty.us](mailto:theresia.rogerson@santacruzcounty.us)  
  
Secondary Contact (in event primary not available): Corinne Hyland  
Telephone Number: (831) 454-7558 E-mail: [corinne.hyland@santacruzcounty.us](mailto:corinne.hyland@santacruzcounty.us)
8. Project/Program Description/Scope (use additional pages, if needed, to provide details such as work elements/tasks):  
Please see attached **CTSC Vision Zero Work Plan for FY 2022-2024**.
9. Project Location/Limits (attach a map and/or photos if available/applicable, include street names): The Vision Zero work plan has a countywide focus engaging all jurisdictions. As needs and opportunities arise in the work plan period, specific jurisdictions or populations may be targeted for traffic safety activities.
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) Our Santa Cruz County community experiences higher rates of bicycle and pedestrian involved fatal and injury collisions than other comparison cities across the state and the pandemic exacerbated this (Please see attached **CTSC Vision Zero Work Plan for FY 2022-2024** for data and rankings). To address this, the CTSC adopted Vision Zero in 2016 as a new approach to traffic safety work. Vision Zero is a world-wide traffic safety program that aims to eliminate all traffic fatalities and severe injuries while increasing safe, healthy, and equitable mobility for all. This program aligns with the mission of the CTSC, which is to prevent traffic-related injuries and fatalities for all road users, with a focus on people biking and walking. The CTSC therefore provides a forum for various agencies and individuals to share information, address issues, collaborate on solutions, and act as a resource for its members and the community. The CTSC envisions safe, accessible and equitable transportation for all.

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.): Please see attached **CTSC Vision Zero Work Plan for FY 2022-2024**.
- 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): The target audience for Vision Zero policy adoption in the CTSC work plan is community stakeholders and decision makers in each jurisdiction while also engaging a broad spectrum of community members throughout the county in identifying issues and developing solutions. Through a variety of program activities, such as outreach and education, several thousand people are reached directly each year.

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? Programmed into the 2040 RTP under project #CO50.

13. Impact(s) of project on other modes of travel, if any (ex. parking to be removed): CTSC works to promote safe and active transportation by conducting community-based activities such as participating in Bike/Walk to School/Work Days and Open Streets events, distributing bike helmets to low-income youth and adults, and utilizing both traditional and social media messaging to reach all age groups. The aim of the attached two-year Vision Zero work plan is to develop policies and systems that use a Safe System approach.

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? \$180,000.00

Is project fully funded? No, funding is sought each year to match TDA funding.

What will TDA (and STA, if applicable) funds be used on (ex. operations, administration, brochures, engineering, construction)? TDA funds are used for personnel, travel and materials needed to implement the program. Please see attached Community Traffic Safety Coalition Budget for FY 2022-23.

15. Preferred Method and Schedule for TDA-LTF fund distribution *(see RTC Rules and Regulations for details and requirements. Note if funds are distributed in advance of use, agencies will be required to subsequently provide documentation of actual expenditures.):*

- a. Bike/Ped: Cities/County: ☐ Up to 90% upon initiation of work OR ☐ 100% upon project completion  
HSA/BTW: ☐ Quarterly disbursement OR ☒ Semi-annual disbursement
- 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: Budget (eg resolution, work program, budget, other document)	Yes

If "NO," provide the approximate date approval is anticipated. _____	
<b>B.</b> Has this project previously received TDA funding? If yes, date RTC approved: Annually	Yes
<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: _____ )	N/A
<b>D.</b> 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
<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?	N/A

**Bike/Ped (Article 8) Only**

17. Project Cost/Budget, including other funding sources, and Schedule: (complete "24a" or "24b")

- a. Capital Projects (Bicycle projects: Bicycle Advisory Committee or RTC must approve the final project design plans prior to construction; see RTC Rules & Regulations)

	Planning	Environ- mental	Design/ Engineering	ROW	Construction	Other *	Contingency	<b>Total</b>
<b>SCHEDULE (Month/Yr) Completion Date /</b>								
<b>Total Cost/Phase</b>								
<b>\$TDA Requested (this claim)</b>								
<b>Prior TDA:</b>								
<b>Source 3:</b>								
<b>Source 4:</b>								
<b>Unsecured/ additional need**</b>								

\*Please describe what is included in "Other":

- b. Non-Capital Projects – Cost/Schedule: List any tasks and amount per task for which TDA will be used. Can be substituted with alternate budget format.

Please see attached Community Traffic Safety Coalition Budget for FY 2022-23.

Work Element/Activi ty/Task	SCHEDULE (Month/Yr)	Total Cost per Element	\$ TDA requested	\$ Source 2:	\$ Source 3:	\$ Source 4:
Administration /Overhead						
Activity 1:						
Activity 2:						

Activity 3:						
Activity 4:						
Ex. Consultants						
Ex. Materials						

**SCMTD, CTSA, Bike to Work, HSA, Volunteer Center Only – PLEASE KEEP ANSWERS BRIEF**

18. 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.
- 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:

This past fiscal year, with City staff now assuming primary responsibility for the Watsonville Vision Zero Task Force (WVZTF), CTSC staff have been able to continue supporting Watsonville while shifting more attention to our second Vision Zero city, Santa Cruz, as well as working with other jurisdictions. All CTSC Vision Zero activities use a combination of funding sources, partnerships, and volunteer contributions, which has increased participation in both Coalition and Task Force meetings. HSA has been successful in receiving state Office of Traffic Safety funding for bicycle, pedestrian and child passenger safety this past year and will be applying again for state Active Transportation Program funding. As with Ride n' Stride, CTSC experienced reductions in personnel costs again this past year due to continued staff deployment to the COVID-19 pandemic response as well as staff vacancies and leaves of absence. This will mean the third year of unused TDA funding rollover will be requested for use in the next fiscal year. This rollover will be used to improve program partnerships, materials, and efficiencies. When possible, HSA uses TDA allocations from RTC to leverage additional funding and will focus this next year on reestablishing an adequate level of staffing to ensure continued success and benefits to the community through CTSC Vision Zero programming.

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

A model is forming whereby CTSC staff transition away from supporting Vision Zero jurisdictions as they become more self-sufficient. While CTSC staff continued to support the Watsonville Vision Zero Task Force (WVZTF) this past year, more effort is now underway in assisting the City of Santa Cruz in creating their own task force for Vision Zero with public health as a key stakeholder. The Coalition will continue to promote Vision Zero policy in the remaining jurisdictions and has begun work with Scotts Valley and the County. The CTSC will continue to provide leadership for Vision Zero data collection & analysis, action plan development, and project implementation with staff and leadership in each jurisdiction. TDA funded resources will focus on these goals as well as educating the community about Vision Zero concepts and convening stakeholders around policies, strategies, and a new Safe System approach.

20. 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)
- ☒ HSA/BTW: Bicycle Committee (Annually in April/May 2023); RTC (Biannually in January 2023 and July 2023)

<sup>1</sup> If feasible, the quarterly TDA reports submitted by Community Bridges for Lift Line as the Consolidated Transportation Services Agency (CTSA) 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, CTSA and Volunteer Center Only**

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

b. Does the project meet an unmet transit need from the most recently approved RTC Unmet Paratransit and Transit Needs List? Describe.

**CTSA and Volunteer Center (Article 8) Only**

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

23. 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

24. 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)

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

25. 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.

**SCMTD Only**

26. 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):

<b><i>Funds</i></b>	<b><i>Urbanized Service</i></b>	<b><i>Rural/Non-Urban Service</i></b> <i>(could use FTA 5311 application)</i>
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.*

27. 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).*

28. 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:

- 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 TDA Claims):**

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

### **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.

**PROOF OF EXPENDITURES:** Claimant acknowledges it is required to submit all expenditure backup as well as evidence of other funding used for project to RTC, to RTC's satisfaction, before receiving periodic disbursement or disbursement upon project completion.

**CERTIFIED FISCAL AUDIT:** Claimant certifies that it has submitted a satisfactory, independent fiscal audit, with the required certification statement, to SCCRTC 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). *This requirement does not apply to new transit operators nor Bike to Work or HSA claims submitted through the SCCRTC.*

Signature Cournee Hyland Title: Senior Health Services Manager Date: 4/6/22

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# CTSC Work Plan: Vision Zero

## Fiscal Years 2022-2024

### CTSC Vision and Mission

The mission of the Community Traffic Safety Coalition (CTSC) of the Santa Cruz County Health Services Agency is to prevent traffic-related injuries and fatalities for all road users, with a focus on people bicycling and walking. The CTSC envisions safe, accessible, and equitable transportation for all.

### Vision Zero Needs Statement

Vision Zero is a world-wide traffic safety program that aims to eliminate all traffic fatalities and severe injuries while increasing safe, healthy, and equitable mobility for all. The mission, goals, and activities of the CTSC align with this aim. In June of 2022, CTSC will complete their sixth year of Vision Zero work and this plan will continue that work into 2024.

In 2019, OTS ranked Santa Cruz County as the 3<sup>rd</sup> worst for bicyclists killed and injured compared to 58 California counties. The City of Santa Cruz (in the north part of the county) was ranked 1<sup>st</sup> for the number of bicyclist injuries/fatalities compared to 105 similar sized cities. The City of Watsonville (in the south part of the county) was ranked 1<sup>st</sup> for pedestrian injuries/fatalities compared to 105 other similar sized cities.

According to [UC Berkeley SafeTREC's Transportation Injury Mapping System](#) (TIMS), the number of people killed or seriously injured in Santa Cruz County in the 3-year period from 2018 to 2020 has increased to 154.7 people on average as compared to 135.3 people on average from 2015 to 2017. According to more recent media accounts, in the six-month period between October 2021 and March 2022, CTSC staff documented a total of 22 crashes involving serious injuries or fatalities in the county. Of the 13 crashes involving fatalities, three of those killed were pedestrians and one was a bicyclist.

The serious traffic safety problem in our county led us to Vision Zero. From our data analysis and community engagement, we know that traffic violence has taken a disproportionate toll on Santa Cruz County bicyclists and pedestrians. To begin ensuring safety in our transportation system, our two most populous cities, Watsonville and Santa Cruz, passed Vision Zero policies in 2018 and 2019, respectively, to eliminate traffic related fatalities and severe injuries by 2030 for all road users.

### Safe System Core Principles

In order to achieve Vision Zero, many countries have moved away from using the traditional E's (Education, Engineering, Enforcement, Encouragement, Evaluation, and Equity) and instead have adopted a Safe System approach to road safety, including the U.S. Department of Transportation. The Safe System approach works by building and reinforcing multiple layers of protection to both prevent crashes from happening in the first place and minimize the harm caused to those involved when crashes do occur.



Source: <https://highways.dot.gov/public-roads/winter-2022/01>

In this sense, it is a comprehensive and systematic approach to road safety that is human-centered and incorporates the following principles:

1. **Death and Serious Injuries are Unacceptable.** A Safe System approach prioritizes the elimination of crashes that result in death and serious injuries.
2. **Humans Make Mistakes.** People will inevitably make mistakes and decisions that can lead or contribute to crashes, but the transportation system can be designed and operated to accommodate certain types and levels of human mistakes and avoid death and serious injuries when a crash occurs.

3. **Humans Are Vulnerable.** Human bodies have physical limits for tolerating crash forces before death or serious injury occurs; therefore, it is critical to design and operate a transportation system that is human-centric and accommodates physical human vulnerabilities.
4. **Responsibility is Shared.** All stakeholders – including government at all levels, industry, non-profit/advocacy, researchers, and the general public – are vital to preventing fatalities and serious injuries on our roadways.
5. **Safety is Proactive.** Proactive tools should be used to identify and address safety issues in the transportation system, rather than waiting for crashes to occur and reacting afterwards.
6. **Redundancy is Crucial.** Reducing risks requires that all parts of the transportation system be strengthened, so that if one part fails, the other parts still protect people.

Source: <https://highways.dot.gov/public-roads/winter-2022/01>

A statistic often used when discussing traffic safety is that “more than 90% of traffic crashes are due to human error.” This view was dominant in the five E’s approach, used by the Safe Routes to School movement, and places a majority of the blame on the individual, whether that be the pedestrian, cyclist, or driver. By using a more effective and equitable Safe System approach, Vision Zero objectives can be aligned with the five elements displayed in the wheel above: Safer People, Safer Roads, Safer Vehicles, Safer Speeds, and Post-Crash Care.

Data has shown that underserved communities and communities of color oftentimes experience the highest rates of fatal and injury crashes. A study done by the CTSC in 2017 found that more than half of our county’s fatal and life changing injury crashes occur on only 6% of our streets with more than half of these dangerous streets located in low-income neighborhoods [www.sctrafficsafety.org/visionzero](http://www.sctrafficsafety.org/visionzero) . Even as the Coalition moves towards utilizing a Safe System approach, equity will continue to remain an emphasis for all the work conducted.

## Vision Zero Work Plan Objectives and Activities for Fiscal Years 2022-2024

### Primary Objectives:

1. Continue to assist the City of Watsonville in Vision Zero Action Plan implementation.
  2. Assist the City of Santa Cruz in developing a Vision Zero Task Force and Action Plan.
  3. Promote Vision Zero adoption and implementation in all other jurisdictions.
  4. Develop and maintain countywide Vision Zero collaboration and support.
- 1) Continue to assist City of Watsonville in Vision Zero Action Plan implementation through activities, such as:



- Provide support and assistance to the City of Watsonville and other south county organizations in managing the Watsonville Vision Zero Task Force.
  - Advocate for continued community engagement and equity prioritization.
  - Provide technical assistance in tracking and measuring progress, as well as evaluating programs.
  - Encourage accountability and transparency throughout plan implementation.
  - Help in identifying funding sources for implementation and sustainability of projects.
- 2)** Assist the City of Santa Cruz in developing a Vision Zero Task Force and Action Plan through activities, such as:
- Advocate for community engagement and equity prioritization in Vision Zero initiatives.
  - Provide a public health perspective into strategies and policy objectives.
  - Assist in development of measurable and attainable goals for Vision Zero action items.
  - Encourage accountability and transparency at all stages of Vision Zero plan implementation.
- 3)** Promote Vision Zero adoption and implementation in all other jurisdictions through activities, such as:
- Invite communication between local jurisdictions and other Vision Zero communities.
  - Convene city/county staff to discuss Vision Zero policy adoption and implementation.
  - Create traffic violence data summaries for jurisdictions considering Vision Zero.
  - Support implementation of Vision Zero Action Plans once adopted.
- 4)** Develop and maintain countywide Vision Zero collaboration and support through activities, such as:

Proposed activities here are aligned with the five *Safe System elements: Safer People, Safer Roads, Safer Vehicles, Safer Speeds, and Post-Crash Care*

#### Safer People:

- Host events for elected officials and relevant government staff members to experience traveling through the county using active modes of transportation.
- Reframe the narrative around road safety to reflect the shared responsibility among various stakeholders, instead of a focus on individual behaviors.
- Participate in the regional Street Smarts campaign to bring awareness and education of road safety issues to the public.
- Provide educational materials about shared- and micro-mobility programs and options to the community.
- Collaborate with County Substance Use Disorders Services (SUDS) on DUI/impaired driving prevention.
- Develop educational materials on Safe Systems and informational handouts about Vision Zero to share with the media that helps guide their communications on crashes.
- Continue child passenger safety education for parents and caregivers on properly securing young passengers in their vehicles.

#### Safer Roads:

- Use all relevant safety data to supplement crash data when evaluating problem areas and traffic situations.
- Include community members and community feedback when designing traffic safety systems.
- Incorporate systems-level changes that allow for consideration of project impacts on those using active transportation.
- Provide opportunities for community members and advocates to provide input to decision makers during planning stages of infrastructure projects.
- Advocate for planning and engineering efforts that incorporate a Safe Systems approach, such as reduce speeds by narrowing travel lanes.
- Develop questions for candidates running for office regarding safe and active transportation.
- Promote protected or separated bicycle and pedestrian facilities when feasible.
- Conduct a crash data analysis focused on arterials for each jurisdiction.
- Encourage funding and land use planning that increases opportunities for more active and sustainable forms of transportation.

#### Safer Vehicles:

- Provide input on local, state, or federal policies and designs that make vehicles safer, such as collision avoidance systems and connected vehicle technology.

- Keep informed about the latest car seat and vehicle restraint system safety technology and recall information.
- Advocate for appropriate safety measures, such as installing lateral protective devices (LPDs), also known as side guards, for local jurisdictions and private fleets with large commercial vehicles.

#### Safer Speeds:

- Implement creative projects to slow down traffic and reduce the potential for crashes to cause serious injuries and fatalities.
- Engage with local government to address traffic speed issues that community members experience.
- Support projects that slow vehicle speeds and protect cyclists and pedestrians.
- Work with jurisdictions to acquire funding to implement temporary projects that slow vehicle speeds.
- Find research reports on effective measures to slow down drivers to share with local jurisdictions.

#### Post-Crash Care:

- Post online acknowledgement and response to lives lost and those severely injured.
- Maintain a current database of serious injury and fatality crashes reported by the media and community members.
- Involve multiple stakeholders, such as media and road safety advocates, to review factors leading to a crash.
- Identify the built environment factors that played into crashes and understand that the designers of those systems hold responsibility as well.
- Work with media contacts to review collision factors, such as road design, when reporting on crashes.
- Work with law enforcement agencies to share local crash data and report on traffic citation trends.
- Change the narrative around responsibility for crashes to look past individual behaviors and to focus on the road system holistically.
- Assist jurisdictions in developing a plan to respond to fatal and severe injury crashes.
- Participate in the World Day of Remembrance for Road Traffic Victims or other annual memorial events.
- Develop resources to support families who have been impacted by traffic violence.

### CTSC Roles and Responsibilities

The coalition staff are employed by the County of Santa Cruz Health Services Agency (HSA) and are responsible for assisting the coalition in managing its operations, including coalition meetings, member communication, and community engagement, as well as work plan development, implementation, and evaluation. The coalition members and partner agencies actively participate in meetings and play an advisory role in fiscal management and strategic planning. Members and partner agencies take on specific work plan tasks as appropriate. Two coalition leaders (Co-Chairs) are elected by coalition members for two-year terms and are responsible for facilitating coalition meetings, providing expertise and guidance to coalition staff, and signing coalition letters.

CTSC will provide support, technical assistance, and resources to jurisdictions and the community to implement Vision Zero, as well as develop and maintain collaborative relationships for other grant funded traffic safety programs that support Vision Zero. The Coalition and staff are also committed to providing traffic safety programming that the community has relied on for many years, such as the Ride n' Stride education program, the Bicycle Traffic School diversion program, Bicycle Helmet Fit and Distribution Sites, participation in Bike/Walk to School and other community outreach events, Pace Car and Trash Can Sticker traffic calming programs, maintenance of the CTSC website at [www.sctrafficsafety.org](http://www.sctrafficsafety.org) and Facebook page, and traffic related injury and fatality surveillance.

### TDA/RnS Budget, FY 2022-23

Line Item	TDA Budget	HSA Match	Total Project Costs
<b>Personnel</b> (Salary + Benefits)			
Bilingual Health Program Specialist, 1 FTE	74,500	58,500	133,000
Program Director/Support Staff		43,500	43,500
<b>Subtotal Personnel</b>	<b>74,500</b>	<b>102,000</b>	<b>176,500</b>
<b>Travel/Mileage</b>	500		500
<b>Direct Costs</b>			
Education Materials & Supplies	3,000		3,000
<b>Totals</b>	<b>\$78,000</b>	<b>\$102,000</b>	<b>\$180,000</b>

### TDA/CTSC Budget, FY 2022-23

Line Item	TDA Budget	HSA Match	Total Project Costs
<b>Personnel</b> (Salary + Benefits)			
Health Educator , 1 FTE	74,500	56,500	131,000
Program Director/Support Staff		45,500	45,500
<b>Subtotal Personnel</b>	<b>74,500</b>	<b>102,000</b>	<b>176,500</b>
<b>Travel/Mileage</b>	500		500
<b>Direct Costs</b>			
Project Implementation	3,000		3,000
<b>Totals</b>	<b>\$78,000</b>	<b>\$102,000</b>	<b>\$180,000</b>



**BIANNUAL PROGRESS REPORT  
TRANSPORTATION DEVELOPMENT ACT FUNDS**

**SECOND BIANNUAL PERIOD  
January 1 – June 30, 2021**

**Project Title: Ride n' Stride Bicycle and Pedestrian Education Program**

**Agency: Santa Cruz County Health Services Agency (HSA)**

**Project Contact: Theresia Rogerson 831-454-4312**

**theresia.rogerson@santacruzcounty.us**

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**Briefly describe the work completed during this biannual period.**

**1. Conduct bicycle and pedestrian traffic safety education sessions for at least 2,500 elementary school and pre-school students in Santa Cruz County school districts.**

During this second biannual period with distance learning still in place in the schools due to the COVID-19 pandemic, Ride n' Stride staff pivoted to the new virtual bicycle and pedestrian safety presentation format for preschool and K-5 grade elementary school students. Staff also delivered the new virtual Walk Smart program jointly with Ecology Action targeting second grade students. The walking field trip component of Walk Smart has still been on hold due to the restrictions on group gatherings.

In this six-month period, students received a Ride n' Stride presentation combining both *bicycle and pedestrian* safety at one elementary school reaching **22** students. Another **44** Walk Smart *pedestrian* safety presentations were conducted at **20** elementary schools throughout the county school districts reaching **915** students. Ride n' Stride staff would have participated in more Walk Smart presentations but were not available for many that were scheduled on Fridays as County workers gave a 7.5% furlough this fiscal year related to the financial crisis caused by the pandemic. Even with this limitation and the primary Ride n' Stride staff person continuing to be deployed part time to assist with the pandemic response, a total of **1,765** students have been reached at **35** schools this fiscal year.

**2. Conduct at least 4 traffic safety presentations to parents/caregivers through schools, community agencies and neighborhood groups to promote safe bicycling and walking in Santa Cruz County.**

During this biannual period, all group gatherings and community events remained cancelled due to the COVID-19 pandemic restrictions. Ride n' Stride staff continued to focus on virtual delivery in the schools and took advantage of an opportunity to reach parents virtually as well.

On February 24<sup>th</sup>, Ride n' Stride staff conducted a virtual presentation during Starlight Elementary school's parent meeting that included education about the importance of wearing a helmet while riding. The presentation reached 24 parents and resulted in follow ups from parents interested in receiving a helmet for their children.

**3. Participate in 4 school or community events to provide traffic safety information and promote safe bicycling and walking in Santa Cruz County.**

As with the objective above, all group gatherings and community events remained cancelled due to the COVID-19 pandemic restrictions during this period.

**4. Collaborate with CTSC, HSA staff and community partners to collect bike and pedestrian safety data.**

During this biannual period, Ride n' Stride staff assisted in collecting bike and pedestrian safety data before and after temporary infrastructure installations near Amesti Elementary School and along Portola in Live Oak. These projects were part of the Active Transportation Plan being developed by the County Department of Public Works, in partnership with Ecology Action, Bike Santa Cruz County, and County Public Health, called Powered by Me.

**5. Work with CTSC, HSA and community partners to coordinate distribution and proper fitting of at least 100 bike helmets to students and other community members.**

Through Helmet Fit Sites, schools, and partner agencies, Ride n' Stride staff coordinated proper fitting and distribution of **82** helmets during this biannual period.

**6. Participate in the fall and spring Bike/Walk to School/Work events, bike rodeos and other bike/pedestrian safety activities, as staff time permits.**

Due to COVID-19, the traditional Bike/Walk to School/Work events were replaced this Spring with Bike Month in May organized by Ecology Action. As part of Bike Month activities and in partnership with County Public Works, Ecology Action and Bike Santa Cruz County, Ride n' Stride staff helped coordinate and build two temporary bicycle and pedestrian infrastructure installations in the Watsonville and Live Oak areas as part of the Powered by Me project mentioned above. For an overview of the project, go to [www.ecoact.org/poweredbyme](http://www.ecoact.org/poweredbyme).

**7. Participate in traffic safety meetings, such as CTSC, Watsonville Vision Zero Task Force (formerly the South County Bicycle and Pedestrian Work Group), and Complete Streets to Schools planning meetings, as staffing capacity and other program priorities allow.**

Ride n' Stride staff attended the virtual bimonthly Watsonville Vision Zero Task Force meetings in the months of January and May and did not attend the bimonthly Community Traffic Safety Coalition (CTSC) meetings. Program staff were also involved in planning meetings and outreach for the Powered by Me program.

**8. Conduct program evaluation including pre/post-testing of student samples, teacher evaluations and reporting of bike and pedestrian observational surveys among children and youth.**

Pre/post-tests were administered to students who received the Walk Smart presentations. Results showed a 19% average increase in knowledge of pedestrian safety, based on a 6-question written quiz. Overall, teacher evaluations rated very high at 4.85, based on a scale of 1 (Ineffective) to 5 (Excellent).

During this biannual period, Ride n' Stride staff met with other Public Health staff who formed a Schools Virtual and In-Person Implementation group. Ideas for virtual polls and evaluation tools were discussed and demonstrated. Once Ride n' Stride is fully staffed again, these tools can be piloted.

**Briefly describe the work to be done next TDA biannual period.**

As mentioned above in the first objective, the primary Ride n' Stride staff remained deployed part time to COVID-19 work from August 2020 through the end of this second biannual period. Ride n' Stride staff primarily focused on virtual presentations through the end of the school year. As restrictions loosen and program staff return to their regular work, the hope is to move into the summer and fall doing outreach and education in group and community settings and in-person at the schools.

*Please find the July 23, 2021 invoice and supporting documentation for TDA funds for the period January – June 2021 attached.*

**BIANNUAL PROGRESS REPORT  
TRANSPORTATION DEVELOPMENT ACT FUNDS**

**FY 20-21 SECOND BIANNUAL PERIOD  
January 1, 2021 - June 30, 2021**

**Project Title: Community Traffic Safety Coalition (CTSC)**

**Agency: Santa Cruz County Health Services Agency (HSA)**

**Project Contact: Theresia Rogerson 831-454-4312 [theresia.rogerson@santacruzcounty.us](mailto:theresia.rogerson@santacruzcounty.us)**

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**Vision Zero Work Plan Progress**

**Primary Objectives:**

1. Continue to assist the City of Watsonville in Vision Zero policy implementation.
2. Assist the City of Santa Cruz in developing a Vision Zero Action Plan.
3. Promote Vision Zero adoption and implementation in all other jurisdictions.
4. Develop and maintain countywide Vision Zero collaboration and support.

**Watsonville**

Continue to assist the City of Watsonville in Vision Zero policy implementation.

- Since the last report, the WVZTF is now being facilitated by Watsonville Public Work's staff and will be implementing action items in the updated City of Watsonville's Safe Streets Save Lives Vision Zero Action Plan 2021.
- CTSC staff provided administrative support to the City of Watsonville Public Works staff and WVZTF, including taking minutes, providing input on agendas, and virtual meeting facilitation support, as well as bringing a public health perspective to the table.
- The Watsonville Vision Zero Task Force (WVZTF) held three virtual bimonthly meetings this biannual period in January, March, and May, with participation from City public works, planning, manager's office, police department and City Council as well as community groups, advocacy organizations, and members of the public.
- The WVZTF members chose a final design for the newly rebranded task force as created by DigitalNEST with funding from CTSC and City of Watsonville as seen below:



- CTSC staff continued supporting City of Watsonville in tracking Vision Zero progress on priority projects, including providing updates to the WVZTF at each meeting, and developing new priority project ideas for 2021 with the WVZTF members.
- City staff returned to City Council on April 13, 2021 to report progress in 2020 and present new priority projects for the Vision Zero Action Plan 2021, receiving unanimous adoption of the updated plan.
- The presentation to City Council and the updated plan are viewable at the City of Watsonville's Vision Zero webpage, and the plan is hyperlinked in the biannual report introduction above.
- CTSC staff convened a committee of the WVZTF to complete a Bicycle Friendly Communities application with the League of American Bicyclists with the goal of improving the City's status from Bronze (awarded in 2017) to Silver.
- HSA worked with the City of Watsonville, Ecology Action, the school district, and local agencies to submit the Safe Routes for Watsonville School Families and Community non-infrastructure grant proposal for state Active Transportation Program Cycle 5, which scored very well but was not awarded, so CTSC staff plan to resubmit for Cycle 6 in 2022.

### **Santa Cruz**

Assist the City of Santa Cruz in developing a Vision Zero Action Plan.

- The City of Santa Cruz was the second Vision Zero city in the county, adopting a Vision Zero policy resolution in August 2019.
- CTSC staff continue to work with the City of Santa Cruz Transportation & Public Works Commission (TPWC) and City staff to assist in Vision Zero next steps.
- Discussions with Public Works, Police Department, and City Manager's office have been ongoing with a goal of securing commitments in creating a Vision Zero Task Force that will develop the Vision Zero Action Plan.

### **Other Jurisdictions**

Promote Vision Zero adoption and implementation in all other jurisdictions.

- The CTSC held two virtual bimonthly meetings focused on Vision Zero this biannual period in February and April with participation from Public Health staff, RTC staff, law enforcement, community groups, advocacy organizations, and members of the public.
- CTSC continues to approach the remaining jurisdictions to encourage adoption and implementation of Vision Zero.

### **Countywide**

Develop and maintain countywide Vision Zero collaboration and support using the E's below:

Education – Equipping people with knowledge, skills, and confidence to use the roads safely and respectfully.

- CTSC staff continue to support local jurisdictions in developing messaging for the Street Smarts regional media campaign, including bilingual videos available for viewing at [www.cityofsantacruz.com/streetsmarts](http://www.cityofsantacruz.com/streetsmarts)

- Bimonthly Mailchimp e-newsletters are sent to CTSC members containing the previous meeting's minutes, upcoming agenda, and Vision Zero related announcements.
- In addition, CTSC staff sent out community partner emails to CTSC members that contained COVID-19 information, resources, and services.

Engineering – Designing and building a transportation system that creates safe, convenient, and comfortable places to drive, bike and walk.

- HSA partnered with County Public Works, County Planning, Ecology Action, and BSCC in a CalTrans Planning grant to develop an Active Transportation Plan for the County unincorporated areas with more information at [www.ecoact.org/poweredbyme](http://www.ecoact.org/poweredbyme)
- The above planning work included all partners working with County Public Works' road crews to construct temporary bike/pedestrian demonstration projects at Green Valley Road in Watsonville and Portola Avenue in Live Oak in May and June 2021.

Enforcement – Ensuring that all road users understand and follow traffic laws and regulations.

- Local crash incidents are discussed as part of each CTSC/WVZTF meeting and local law enforcement officers in attendance are invited to report additional information.
- CTSC staff also began research on post-crash response protocols through the Vision Zero Network ( [www.visionzeronetwork.org](http://www.visionzeronetwork.org) ) and will reach out to Bay Area Vision Zero cities to learn more.

Encouragement – Promoting a culture that recognizes drivers, cyclists, and pedestrians as road users who all share the responsibility for safety.

- CTSC staff provided advisory support to Bike Santa Cruz County (BSCC) in creating a Slow Streets program to provide active transportation opportunities in several jurisdictions during pandemic social distancing. More information can be found at BSCC's Slow Streets webpage.

Evaluation – Using data to measure progress and plan for success.

- CTSC staff continue to collect information from media reports of traffic-related fatalities and severe injuries in a database to track crash data that's more current than the Statewide Integrated Traffic Reporting System (SWITRS).

Engagement – Intentionally involving individuals and communities to build relationships, develop meaningful solutions to their needs, and influence policy making.

- Messages are posted to the CTSC Facebook page acknowledging losses to families of traffic violence victims within the county (see end of report for Facebook page weblink).
- In January, HSA applied for three state Office of Traffic Safety (OTS) grants in bike/pedestrian safety, child passenger safety, and impaired driving as part of Vision Zero efforts countywide. All three grants were awarded and will begin in September 2021.

All efforts incorporated Equity – Prioritizing safety and access for communities who are most impacted by traffic violence.

### **CTSC Media Coverage**

Lookout Santa Cruz – May 18, 2021

**Bikes, cars & safe co-habitation: Santa Cruz is among the most dangerous cycling counties in the state**

<https://lookout.co/santacruz/coast-life/story/2021-05-18/bikes-cars-safe-co-habitation-santa-cruz-among-most-dangerous-biking-counties-in-the-state>

### **CTSC Letters of Support**

- 1) January 24, 2021 – Letter to the State of California Office of Traffic Safety supporting the grant application by the City of Santa Cruz Public Works Department for their Street Smarts campaign.
- 2) January 29, 2021 – Letter to State of California Office of Traffic Safety supporting the Santa Cruz County Health Services Agency (HSA) in their application bicycle/pedestrian safety and occupant protection grants.
- 3) February 3, 2021 – Letter of support for the County of Santa Cruz Planning Department’s application for a vehicle-miles traveled (VMT) mitigation program.

### **Ongoing CTSC Programs**

**Bicycle Traffic School (BTS)** – BTS two-hour classes are now offered quarterly and are taught by CTSC staff’s League Cycling Instructor (LCI), which is a certification from the League of American Bicyclists (LAB). These classes are now taught virtually while COVID-19 mitigation limits in-person group gatherings. CTSC staff provides information about this diversion program to local law enforcement agencies regularly. In addition, the class is offered free to the public for those who want to feel safer and more confident riding on busy local streets.

**Traffic Calming Programs** - In an effort to slow traffic on residential streets, CTSC offers both a Trash Can Sticker and PACE Car stickers for community members to use when speeding is an issue in their neighborhood. The Trash Can Sticker is a sticker developed by CTSC that says ‘Please Drive Slowly’ to be placed on curbside waste collection bins. This traffic calming program is currently operating in the City of Santa Cruz only. The Santa Cruz County Cycling Club (SCCCC) awarded funding for initial development and production of the stickers. Other waste management agencies in the county will be approached in the future to offer the program in other jurisdictions. The PACE Car program also aims to reduce speeds in neighborhoods and has been ongoing for many years. Pace car community members sign a pledge to drive within the speed limit, stop for pedestrians, drive courteously, and display a Pace Car Sticker on their vehicles. Pace car drivers act as “mobile speed bumps,” slowing any speeding drivers behind them. The more Pace car drivers in a neighborhood, the more effectively the program works to slow traffic.

Anyone who is interested in requesting a Trash Can or Pace Car sticker may go to the Order/Comment Form of the CTSC website at [www.sctrafficsafety.org](http://www.sctrafficsafety.org)

**CTSC Website, Facebook Page and YouTube Channel** – CTSC maintains an active social media presence through its website, Facebook page, and YouTube channel. The Facebook page at [www.facebook.com/sctrafficsafety](https://www.facebook.com/sctrafficsafety) is used to share timely traffic safety related news and events, promote safe traffic behaviors, and air targeted PSAs. The YouTube channel at [www.youtube.com/sctrafficsafety](https://www.youtube.com/sctrafficsafety) includes video playlists for bike safety, distracted driving, and child passenger safety resources.

### **CTSC Staff Roles and Responsibilities**

To pursue another local bicycle safety career opportunity, the primary CTSC staff person, a Health Educator, resigned from the County in December 2020. They agreed to continue working several hours a month to keep the CTSC and the Watsonville Vision Zero Task Force (WVZTF) meetings going while we recruited to fill the vacated position. Meanwhile during this biannual period, County Public Health staff have continued to be deployed to the pandemic response as well as potential debris flow response, so program hours for CTSC work have been limited. Due to other programs being delayed because of the pandemic restrictions, the new Health Educator, who will begin in July 2021, will have several high priority grant deliverables to focus on this next fiscal year.

*Please find the July 23, 2021 invoice and supporting documentation for TDA funds for the period January – June 2021 attached.*



Via Email

April 15, 2022

Ms. Kim Krause  
Finance Director  
City of Santa Cruz  
333 Front Street, Suite 200  
Santa Cruz, CA 95060

Re: **Transportation Development Act – 2<sup>nd</sup> Quarter Summary Report FY 2021-2022**  
(Contract between “City of Santa Cruz and Community Bridges/Consolidated  
Transportation Services Agency”)

Dear Ms. Krause:

Enclosed, please find the Transportation Development Act Quarterly Report for the period  
beginning October 1, 2022 and ending December 31<sup>st</sup> 2021.

If you would like additional information or have any questions, please feel free to contact me.

Thank you for your attention to this matter.

Sincerely,



Douglas Underhill  
Chief Financial Officer  
831-688-8840 ext. 276  
[douglasu@cbridges.org](mailto:douglasu@cbridges.org)

Encl.

cc: A. Marino, Transportation Planner, SCCRTC  
T. New, Director of Finance and Budget, SCCRTC  
N. Duarte, Accounting Technician, City of Santa Cruz  
N. Gong, Accountant II, City of Santa Cruz  
R. Iskandarova, Grants Analyst, Community Bridges  
A. Bigham, Grants Analyst, Community Bridges  
R. Cancino, CEO, Community Bridges  
S. McGibben, CAO, Community Bridges  
J. Bojorquez, Program Director, CTSA: List Line

Quarterly TDA  
Report :  
  
Time Period:

FY 21/22 QUARTER 2  
  
OCT-NOV-DEC 2021

CC 20,23,26,31,32,38,39							CC 21						CC 29						CC 24,30								
#	Performance Measures to be Included in Quarterly Reports	Medical					YTD % of	Meals on Wheels					YTD % of	Taxi Scrip					YTD % of	Elderday					YTD % of	Qtr Total	YTD Total
		Oct	Nov	Dec	Qtr	YTD	Goals	Oct	Nov	Dec	Qtr	YTD	Goals	Oct	Nov	Dec	Qtr	YTD	Goals	Oct	Nov	Dec	Qtr	YTD	Goals		
1	Unduplicated Passengers per Month	207	146	115	284	606		99	114	21	125	248		18	19	14	27	54		57	67	68	61	122		497	1,030
2	Total Passenger Trips (Units of Service) per Month	769	679	635	2,083	4,747	79%	492	412	377	1,281	3,893	63%	102	108	81	291	513	36%	1,162	1,210	1,405	3,777	6,850	42%	7,432	16,003
3	Number of Incidents per Month	0	0	0	0	0		0	0	0	-	0		0	0	0	0	0		0	0	0	0	0		0	0
4	Number of Accidents per Month	1	0	0	1	2		0	0	0	-	0		0	0	0	0	0		0	0	0	0	0		1	2
5	Number of Mechanical Failures (including lift failure) per Month	1	3	2	6	6		0	0	0	-	0		n/a	n/a	n/a	n/a	n/a		0	0	0	0	0		0	0
6	Number of No-Shows per Month	43	36	30	109	191		3	65	44	112	117		n/a	n/a	n/a	n/a	n/a		49	56	84	189	292		0	0
7	Number of Turndowns or Referrals per Month	0	0	0	0	0		0	0	0	-	0		0	0	0	0	0		0	0	0	0	0		0	0
8	Number of Cancels per Month	1352	1237	822	3,411	7,080		141	986	363	1,490	1,665		0	0	0	0	0		606	846	543	1,995	6,307		6,896	15,052
9	Total Donations per Month			387	387	\$1,157					-	0					\$0	0					0	0		387	1,157
10	Number of Complaints per 1,000 Passenger Trips	0	1	0	1	2		0	0	0	-	0		n/a	n/a	n/a	0	0		0	0	0	0	0		1	2
10	Complaints	0	1	0	1	2		0	0	0	-	0					0	0		0	0	0	0	0		1	2
11	Number of Safety Incidents per 100,000 Vehicle Miles	0				0		0				0		n/a	n/a	n/a	0	0		0.0				0		0	0
12	Operating Cost per Passenger Trip				\$83.09						\$19.31						\$50.46					\$24.32					
13	Operating Cost per Vehicle Service Hour				\$112.16						\$91.78											\$56.18					
14	Passengers per Vehicle Service Hour				1.50						4.75											3.92					
15	Passengers per Vehicle Service Mile				0.09						0.16											0.25					
16	Van Mileage per Program				21,010						8,088											15,146					

Date	First Name	Last Name	Location	Cross Street	City	Category	Additional Comments	Forwarded to	Forwarded Date	Response
04/21/22	Debbie	Bulger	Water St	Ocean St	Santa Cruz	Ped: Traffic signal problem	The pedestrian crossing button does not seem to be working crossing Ocean from Santa Cruz Vac and Sew toward the gas station across Ocean. I did not get the walk signal after pressing the button. In addition, the small size of the island where peds are forced to wait is totally inadequate and terrifying. How would you like to stand there as semi trucks and other vehicles speed by? Definitely not safe.	Claire Gallogly, Dan Estranero	04/27/22	<b>4/27/22 Dan Estranero:</b> We will have our signals tech take a look at the pedestrian push button.
04/16/22	Nancy	Ogle	164 Rankin St	Seaside St	Santa Cruz	Ped: Plant overgrowth or interference, Vehicles or objects blocking sidewalk, Lack of wheelchair access	Many, many sidewalks on the Westside are missing or inaccessible, and quiet streets are not such a problem. But this is an access street to shopping center and this kind of issue is easily fixed. I wasn't about to knock on their door to ask them to trim their hedge. I tried to upload photo but am unable to resize. Too bad it doesn't happen automatically.	Claire Gallogly, Dan Estranero	04/20/20	<b>4/20/22 Dan Estranero:</b> Good Afternoon Jason, We will send a letter to property owner to trim their vegetation.
04/08/22	Debbie	Bulger	Ocean View Ave	Soquel Ave	Santa Cruz	Ped: Other	Crossing Soquel Avenue to get to Ocean View Avenue is difficult for pedestrians. The intersection needs to be modified to make it safer for peds. A median island would greatly increase safety and also function to slow down drivers. There appears to be ample room for a median island since the curb radius of Ocean View Avenue is so great. A placeholder median island could be demarcated with bollards until there is money for a permanent median island.	Claire Gallogly, Dan Estranero	04/12/22	<b>4/27/22 Dan Estranero:</b> We will take a look into improving this intersection.
03/24/22	Erick	Balagtag	Water St	N/A	Santa Cruz	Ped: No crosswalk or striping, Other	In addition, missing vehicle bollards placed Santa Cruz Riverwalk access on Water Street, enables vehicles to access county/court property freely and often speed down pedestrian Riverwalk Trail during normal business hours as well as afterhours.	Claire Gallogly, Dan Estranero	03/30/22	<b>4/27/22 Dan Estranero:</b> This is something our team will have to discuss in our next meeting. I will try to give you an update next week.

Date	First Name	Last Name	Location	Cross Street	City	Category	Additional Comments	Forwarded to	Forwarded Date	Response
03/04/22	Becky	Steinbruner	Freedom Blvd	Soquel Dr	Santa Cruz	Ped: Other	<p>The Cabrillo Lions Club volunteers maintain the World War I Veterans Memorial Monument Garden at the corner of Freedom Boulevard and Soquel Drive. We have experienced close-calls with motorists on Freedom Boulevard who approach the intersection to make a right turn onto westbound Soquel Drive, especially if the traffic signal at the intersection is green for the Freedom Boulevard approach to Highway One. Several times some of our elderly volunteers have had near-collisions with vehicles speeding close by, preparing to make a right turn onto Soquel Drive. We have also witnessed pedestrians crossing there to access the Metro stop nearby nearly being hit. We have determined it is a dangerous area, and are especially concerned about sight-impaired pedestrians being especially at-risk of potentially fatal accidents at this crossing. As a public service organization whose primary goal is to help low-vision and blind people, the Lions Club volunteers are worried about the safety of this intersection and hope that ADA accessible lights with audible crossing signalization can be installed very soon to improve public safety. I hope that you will respond to let me know what improvements, if any, may already be scheduled for this intersection.</p>	DPW	03/07/22	<p><b>3/7/22 Jana Vargas:</b> Good afternoon, Thank you for your email. I will forward to our Traffic Division for review and response. <b>4/28/22 Russell Chen:</b> Can you please take a look at this one? We may need to get a quote to install audible pedestrian crossing signal. <b>4/28/22 John Lumicao:</b> Yes we can install an audible. I will notify Calwest to install an audible at this crosswalk. Also, I will create a WO to install R 10-15 at this location. Thanks for the reminder.</p>

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

**FROM:** Amanda Marino, Transportation Planner

**RE:** FY 2022-23 Transportation Development Act Funds for  
Community Bridges Lift Line Paratransit Program

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## **RECOMMENDATION**

Staff recommends that the Elderly & Disabled Transportation Advisory Committee:

1. Review the FY 2022-23 claim for TDA funds from Community Bridges-Lift Line in the amount of \$905,632 and recommend approval by the Regional Transportation Commission; and,
  2. Review the FY 2022-23 claim for State Transit Assistance Funds (STA) funds from Community Bridges in the amount of \$204,158 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. 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 2022-23 budget was approved by the RTC at their April 2022 meeting, including 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 2022-23 budget includes Transportation Development Act (TDA) allocations for Community Bridges in the amount of \$ 905,632. 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 42,942 one-way trips, including Taxi Scrip, Medical TDA, Meals on Wheels, and Elderday, to eligible clients over FY 2022-23. 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 public transit and community transportation services and 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.

Based on the State's estimate, the RTC and eligible transit operators would receive approximately \$4.68 million (\$2.43 million in Revenue-Based and \$2.25 million in Population-Based). METRO and Lift Line have requested and staff recommends that the RTC designate 8.4% of the RTC's FY 2022-23 discretionary share (99313) to Lift Line and the balance to METRO. This postpones the RTC's September 2019 action, which would have made 15% of STA and SGR funds available to public transit or community transportation services operators starting in FY 2022-23.

Lift Line proposes to use 8.4% or \$204,158 in estimated FY 2022-23 STA funds to continue the level of same day and out of county medical transportation services through FY 2023. This is identified as a high priority in the RTC Unmet Transit and Paratransit Needs List. The additional STA funds will also serve as a match with Federal Transit Administration 5310 (FTA5310) funding to prolong the duration and increase the total number and availability of same day and out of county rides provided by Lift Line, adding an additional 2,206 rides.

### ***Future STA Apportionments***

In 2017, with Senate Bill 1 increasing state funds allocated to the State Transit Assistance (STA) program, the RTC adopted a policy to gradually make 25% of RTC-shares of STA funds available to any eligible transit or community transportation operator. Consistent with state goals and guidelines, the RTC should consider program and service benefits when determining use of the funds. In 2019, the RTC decided to postpone making funds available to any eligible operator until FY22/23. However, given

impacts of the COVID-pandemic on METRO and Lift Line, RTC staff recommends that the RTC approve the METRO and Lift Line request to make 8.4% of STA funds available to Lift Line in FY22/23 and allocate the balance to METRO. Given priorities identified in the Unmet Transit Needs list and that COVID-ridership recovery may take some time, **staff also recommends that the RTC indicate its intent to allocate FY23/24 and FY 24/25 funds by this same formula (8.4% of STA-99313 funds to Lift Line and balance to METRO). Staff recommends that the E&D TAC provide input on this option.**

**Staff recommends that the E&D TAC review the FY 2022-23 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.** The RTC is scheduled to consider the claim at its June 2022 meeting.

## **SUMMARY**

The E&D TAC annually reviews Transportation Development Act claims for Community Bridges Lift Line, 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 2022-23 Community Bridges TDA/STA Claim and operation/budget pages.

*I:\E&DTAC\TDA\CTSA\2023\SR\_TDA\_COMMUNITYBRIDGES.DOCX*

April 27, 2022

Mr. Guy Preston, Executive Director  
Santa Cruz County Regional Transportation Commission  
1523 Pacific Avenue  
Santa Cruz, CA 95060-3911

RE: CTSA/City of Santa Cruz Claim for FY 2022/2023 TDA/STA Revenues

Dear Mr. Preston:

The City of Santa Cruz has been asked to act as claimant for the 2022/2023 fiscal year Transportation Development Act (TDA) and State Transit Assistance (STA) funds allocated to the consolidated Transportation Services Agency (CTSA). Please accept this letter that Community Bridges' Lift Line attests to the accuracy of the claim and all its accompanying documentation.

The City of Santa Cruz will be asked to request \$905,632 in TDA funds for the CTSA as well as \$204,158 in STA funding. The proposed payment schedule shown in Exhibit D includes an initial payment to cover annually remitted expenses, including a substantial insurance premium due in July. The three remaining quarters are adjusted to reflect the balance.

These funds will allow Community Bridges' Lift Line to continue to operate a variety of vital specialized transportation programs serving low income seniors and disabled individuals who are unable to utilize traditional public transit. TDA funds will be used for the Taxi Scrip programs operating in South and North County, non-emergency medical transportation, and transportation to Meals on Wheels Senior Dining Centers and Elderday Adult Day Health Center. The STA funds will be used for Same Day and Out of County program through the whole FY22-23, helping connect seniors, veterans and medically complex children and individuals to need medical services.

Enclosed are documents comprising our claim for TDA and STA funds:

1. 2022/2023 TDA Claim Form, Written Report of Activities, and CHP Inspection Report
2. 2022/2023 Operating & Capital Budget (Exhibit A, pages 1-2)
3. CTSA Five Year Capital Improvement Plan (Exhibit B)
4. Operating Plan (Exhibit C-1, pages 1-2 & C-2, page 1)
5. Schedule of Payments Requested (Exhibit D)
6. Statement of Role and Responsibility (Exhibit E)
7. CTSA Reporting Period & Performance Measures (Exhibit F)
8. Community Bridges Board Resolution 2022-03-01



On behalf of Lift Line clients and Community Bridges, I thank the Commission and staff for your continued support of these programs.

Thank you,



Raymon Cancino, CEO

Cc: J. Bojorquez, Lift Line Program Director  
D. Underhill, CFO  
S. McGibben, CAO  
A. Bigham, GA  
A. Marino, Transportation Planner, RTC  
R. Moriconi, Senior Transportation Planner, RTC

# Transportation Development Act (TDA) – Local Transportation Funds STA 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 \$905,632  
  STA (transit only) \$204,158
5. Fiscal Year (FY) for which funds are claimed: FY 22/23
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   Article 3 & 8	<input type="checkbox"/> TDA Admin or Planning
7. Contact Person/Project Manager  
Name: Jesus Bojorquez  
Telephone Number: 831-688-8840 ext. 241                      E-mail: jesusb@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 is to coordinate and provide social services and transportation services with existing fixed-routes of public and private transportation providers for low-income elderly and disabled Santa Cruz County residents, in accordance with 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)  
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 pursuant to the Social Service Transportation Improvement Act. The purpose of the CTSA is to improve

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

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

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

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

#### 11. Project Productivity Goals for this fiscal year:

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

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

We will continue to provide our quarterly TDA/STA reports, with the RTC reporting requirements, which are generated directly from the actual rides performed and documented through these systems. Lift Line's dispatch and scheduling system still has some manual components, to be used in the case of a power loss or technical difficulties. Since we cannot determine in advance when a power or technical problem should arise, we give all drivers a paper manifest to work from daily so as to not lose any information. Daily, drivers fill out paperwork to let us know if they have any incidents, accidents or mechanical failures. In order 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 in case 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 service to nearly 745 Santa Cruz County residents who will use specialized wheel-chair accessible vans. We are projecting to provide and coordinate 44,631 rides in the 22/23 fiscal year. *Please see Exhibit C-1 and C-2 Operating Plan for details.*

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

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

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

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

The Lift Line program also support the following RTP policies:

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

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

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

Furthermore, Lift Line provides residents with specialized transportation needs who do not qualify for ParaCruz rides because they live outside the service area (more than  $\frac{3}{4}$  mile from fixed transit route), don't have family or friends to assist them, and/or they may need same day service. For people who are low income or who face health/physical challenges, these services are crucial.

Lift Line was also awarded Section 5310 grant for operating funds in 2020-2022 to support same day and out of county medical transportation service, as identified in the AMBAG unmet needs plan. This new service was implemented in 2013 and we have been awarded 5310 funds to continue the project through January 2023. STA funding will fill in the gap and allow us to continue the same day and out of county service at the current levels without any reductions in FY2223 or a potential gap in service. By augmenting 53110 funding with STA funds, we will continue the same day and out of county program and provide an additional 3,906 rides FY2223. This transition also allows for seamless transportation and, depending on future STA funding opportunities, will ensure this vital program continues beyond 5310 funding cycles.

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 = \$2,882,059 (of which \$905,632 are TDA funds and \$204,158 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:	<b>YES?/NO?</b>
A. Has the project/program been approved by the claimant's governing body? Form of approval <u>Community Bridges Board Resolution</u> . (eg resolution, work program, budget, other document) If "NO," provide the approximate date approval is anticipated. _____	YES
B. Has this project previously received TDA funding?	YES
C. For capital projects, have provisions been made by the claimant to maintain the project or facility, or has the claimant arranged for such maintenance by another agency? (If an agency other than the Claimant is to maintain the facility provide its name: _____)	N/A
D. Bike, Ped, and Specialized Transportation Claims: Has the project already been reviewed by the RTC Bicycle Committee and/or Elderly/Disabled Transportation Advisory Committee? (If "NO," project will be reviewed prior to RTC approval). <u>April 9, 2019 E&amp;D TAC meeting</u>	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 re-structured to increase productivity, we group rides when possible so that vehicles and staff time are serving at capacity. This keeps the cost of operating down and helps keep the cost per service unit as low as possible. Failing to re-structure and maximized productivity would lead to increased cost per service unit. In the case of taxi subcontractors, we have paid special attention to maximizing the benefit of working with these outside partners only when we have reached our internal existing capacity and there is a cost benefit to calling in a taxi ride. We continue to work with physicians and participants to improve efficiency through group rides. Our experienced drivers, schedulers, and dispatch staff, with the use of computerized scheduling equipment, continue to serve as valuable assets toward achieving these goals.

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

The County Health Services Department's programs, such as In Home Health Services, as well as local medical facilities and the Senior Network Services, are assisting their clients in filling out the TDA Medical Transportation Application as well as faxing the application with required supporting documents to our office, on a regular basis. We also work with the Central Coast Alliance to coordinate medical rides for Medi-Cal eligible participants.

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

Lift Line continues these outreach efforts which was made possible with Measure D funds. We continue to build our outreach program and get information out about our service and help enroll new clients into our program. In the last year, Lift Line has enrolled 62 new clients to our ridership program. This is an 8% total increase to qualifying ridership.

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

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

To increase productivity, our driver trainer will work to get drivers trained and Commercial Class C certified in a quick and efficient manner. The driver trainer can work as a backup driver when needed, which will help fill in the gaps as well as help put drivers on the road sooner.

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

Lift Line as a program of Community Bridges is participating in a 10 program agency wide data migration program that will allow the agency as a whole to identify all program services that an applicant will qualify for. For example, if a client is applying for Elderday or Meals on Wheels services we will be able to identify if that applicant also qualifies for Lift Line services. As a result, they will be referred to Lift Line.

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

Community Bridges/Lift Line is requesting TDA and STA funds to assist with the same types of rides as last year. We are requesting funding for: Medical TDA Rides, Meals on Wheels, Elderday, and the Taxi Scrip programs. Lift Line is allocating the same funding percentage amounts to the same four programs as it did in pre-COVID levels. During COVID, there were modification to the funding levels of congregate meal sites and Elderday, due to partial closures.

Using additional STA funds to match with 5310 funding to prolong the duration and increase the total number and availability of same day and out of county transportation program, adding an additional 2,206 rides.

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 2019, Jan 2020, Apr 2020, Jul 2020 and year end report 19/20

**CTSA and Volunteer Center (Article 8) Only**

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

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

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

Residents using our out-of-county medical ride service for critical care treatment are often those who have no other resources, particularly due to financial restraints. The veterans we are currently providing paratransit services for are funded through the FTA Section 5310 Grants Program. This grant has been awarded through June 2022, and we were very proud to be able to maintain this service for as long as possible, as demand for service for this specific population has continued to grow. Even though the 5317 funds for this service came to an end, Lift Line/CTSA continues to seek other funding sources to support this service, which was an unmet need in the coordinated plan. STA funding will allow us to match 5310 funds and prolong this program and provide additional transportation for the same day and out of county program.

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

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

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

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

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

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

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

There are times during the day when it is more cost effective or necessary to use taxi to provide some of the TDA Medical rides, especially when they are short rides and more on an individual need basis, while Lift Line buses provided more of the grouped rides. Lift Line has two on-call drivers to assist with paratransit services as needed.

24. **SCMTD, CTSC, Volunteer Center & RTC Only** List the recommendations provided in the last TDA Triennial Performance Audit and your progress toward meeting them.

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

#### **TDA Triennial Performance Audit Recommendations:**

The last TDA Triennial Performance Audit covers FY’s 2019-2021. Community Bridges is still awaiting a final report.

Two Verbal recommendations have been provided:

1. To provide on-time performance reporting. In response to this, we are now tracking and generating monthly on-time performance reports for all drivers.
2. To report Measure D rides on the quarterly and annual reports. Beginning in FY 22-23 we will satisfy this request.



**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: April 27, 2022

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## **Lift Line 2022-23 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 on average more than 46,000 rides 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 when we may accommodate. Lift Line also coordinates and schedules taxi rides that are provided outside of business hours to accommodate rides.

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 of Watsonville. 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 therefore we submitted an application on a separate track to help expedite the project and process. 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 transportation above the ADA mandated METRO Para Cruz services.

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

**Senior Dining Centers:** Lift Line provides transportation to four senior dining centers throughout the County five days per week. Due to COVID-19 and a slow reopening we are still building out our ridership and participation in our rides to congregate meal sites. As a result of the pandemic we saw a large reduction in participation and are working with our partner agencies to increase demand.

**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 amount 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. Our service

model shifts helped address the increased demands on home delivered meals and helped us contribute to 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 affirmed by a physician. This program is still currently operating to support older adults reentry.

### **Vaccination Transportation:**

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 still currently in operation and focusing efforts on boosters.

### **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. The added precautions have been particularly impactful to our operations as we have to be nimble enough with our operations where we have increased unscheduled rides as we return to normal operations while still having to rearrange the workloads among the limited staff.

Lift Line's upcoming challenges are that as the community is returning to normality; we have been experiencing increased ride requests while still operating with limited staff. We have been working to accommodate the return on in person services with the increased demand of new riders and routes. Lift Line has invested in new scheduling software that has allowed us to efficiently maximize scheduling to maximize vehicle capacity and address this immediate impact. Still, Lift Line needs to hire three commercial drivers to keep up with projected future demands as in person services resume and people become comfortable with returning to these services.

In addition, Lift Line has been having challenges with our overflow and after hours' transportation. Lift Line use the services of Watsonville Courtesy Cab, Santa Cruz Yellow cab, Uber, and Lyft to provide medical transportation during Lift Line after hours. Due to low personal Watsonville Courtesy Cab do not have the capacity to provided Lift Line with support during in hours overflow but have been able to accommodate after hours support. Lift Line utilized a customized scheduling software with Uber and Lyft to provide assistance for the overflow rides, the challenge with this TNC is that they do not have Wheelchair accessible vehicles, Lift Line is looking into other alternatives to resolve this challenge.

Santa Cruz Yellow Cab and Watsonville Courtesy Cab are still the designated providers for Lift Line taxi-script program. Our 2021 Taxi-script service survey show that taxi-script users still use both Yellow Cab and Courtesy Cab without problems and satisfactory survey results.

## TDA 2022-2023 BUDGET

	TDA/STA 2022-23	Non-TDA 2022-23	CTSA 2022-23	TDA/STA 2021-22	Non-TDA 2021-22	CTSA 2021-22
ACCOUNT TITLE	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET	BUDGET
<b>PERSONNEL:</b>						
Salaries & Wages	488,902	509,776	998,678	434,313	438,558	872,871
Fringe Benefits: Unemployment	4,889	5,098	9,987	6,515	705	7,220
Workers Comp	14,810	27,927	42,737	17,721	18,477	36,198
Health Insurance	64,551	67,307	131,858	27,037	57,453	84,489
FICA	37,401	38,998	76,399	33,225	34,069	67,294
401K Plan	11,474	11,964	23,438	8,486	8,849	17,335
<b>TOTAL PERSONNEL COSTS:</b>	<b>622,026</b>	<b>661,070</b>	<b>1,283,096</b>	<b>527,296</b>	<b>558,111</b>	<b>1,085,407</b>
<b>SERVICES &amp; SUPPLIES:</b>						
<b>OPERATING:</b>						
Vehicle Operations-Fuel	39,440	41,024	80,464	31,359	32,698	64,058
Vehicle Licenses	4,565	4,760	9,325	3,944	4,112	8,055
Vehicle Repair & Maintenance	16,967	17,691	34,658	17,715	18,471	36,186
Vehicle Insurance	37,711	39,321	77,032	36,501	38,059	74,560
Communications-Radio	34,387	35,855	70,242	21,979	22,917	44,896
<b>TOTAL VEH. OPERATING COSTS:</b>	<b>133,069</b>	<b>138,700</b>	<b>271,720</b>	<b>111,497</b>	<b>116,258</b>	<b>227,755</b>
<b>OTHER OPERATING &amp; ADMINISTRATION COSTS:</b>						
Professional Services	0	51,093	51,093	2,524	38,703	41,227
Janitorial Services/Supplies	3,947	4,115	8,062	3,347	3,490	6,837
Legal services/Audit	0	10,949	10,949	0	18,085	18,085
Publicity/Media	0	13,155	13,155	0	13,145	13,145
Special Events	0	389	389	0	378	378
Staff travel	1,266	0	1,266	0	259	259
Minor Equipment	3,373	3,517	6,891	3,275	3,415	6,690
Equip Maintenance/Repair	6,828	7,119	13,947	6,629	6,912	13,540
Office Supplies	954	995	1,949	1,313	579	1,892
Program Supplies	4,566	4,761	9,327	3,955	4,124	8,079
Vehicle Maintenance Supplies	218	228	446	39	394	434
Computer Supplies/Related	287	300	587	279	291	570
Postage	1,123	1,171	2,295	1,091	1,137	2,228
Utilities	13,463	14,037	27,500	12,239	12,761	25,000
Space Maintenance	4,248	4,430	8,678	6,979	7,277	14,256
Telephone	1,480	1,544	3,024	1,553	1,383	2,936
Misc Fees	2,034	2,121	4,155	2,073	2,161	4,234
Staff Training	1,982	2,067	4,049	3,655	3,811	7,466
Insurance-General Liability & Fidelity	3,844	4,009	7,853	1,963	5,890	7,853
Memberships/Subscriptions	1,930	2,012	3,942	690	3,137	3,827
Printing & Copying	1,383	1,442	2,825	686	2,057	2,743
Advertising (Recruitment)	650	678	1,328	65	1,837	1,901
Interest Expense	0	59,000	59,000	0	75,333	75,333
Subsidized Taxi - Elderday Rides	0	3,180	3,180	0	3,873	3,873
Subsidized Taxi - MOW Rides	0	0	0	0	0	0
Subsidized Taxi - LL Rides	0	32,956	32,956	7,357	35,114	42,471
Subsidized Taxi - Scrip	19,721	0	19,721	19,147	0	19,147
Nonsubsidized Taxi-Measure D Svcs	0	17,000	17,000	0	42,199	42,199
Trxfer to/from Equip Reserve	32,389	23,317	55,706	82,092	0	82,092
300 Facility Reserve	49,620	0	49,620	0	0	0
Major Equipment - 5310	0	0	0	0	0	0
Major Equipment - Carb					203,997	203,997
Major Equipment - Non-5310	58,542	170,487	229,029	37,608	20,934	58,542
300 Property Fixed Asset	0	411,117	411,117	0	301,222	301,222
Leasehold Improvements	0	0	0	0	0	0
Debt Repayment	0	0	0	0	20,182	20,182
Agency Overhead	140,835	125,369	266,205	122,015	137,734	259,749
<b>TOTAL ADMINISTRATION COSTS:</b>	<b>354,686</b>	<b>972,557</b>	<b>1,327,243</b>	<b>320,574</b>	<b>971,813</b>	<b>1,292,387</b>
<b>TOTAL EXPENDITURES</b>	<b>1,109,790</b>	<b>1,772,269</b>	<b>2,882,059</b>	<b>959,367</b>	<b>1,646,182</b>	<b>2,605,549</b>
<b>TOTAL REVENUES</b>	<b>1,109,790</b>	<b>1,772,269</b>	<b>2,882,059</b>	<b>959,367</b>	<b>1,652,702</b>	<b>2,612,069</b>
<b>NET GAIN (LOSS)</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>	<b>0</b>	<b>6,520</b>	<b>6,520</b>

**COMMUNITY BRIDGES - LIFT LINE / CTSA  
TDA 2022-2023 BUDGET**

**EXHIBIT A, Page 2 of 2**

<b>ACCOUNT TITLE</b>	<b>TDA/STA 2022-23 BUDGET</b>	<b>Non-TDA 2022-23 BUDGET</b>	<b>CTSA 2022-23 BUDGET</b>	<b>TDA 2021-22 BUDGET</b>	<b>Non-TDA 2021-22 BUDGET</b>	<b>CTSA 2021-22 BUDGET</b>
<b>REVENUE:</b>						
TDA	905,632	0	905,637	859,367	0	859,367
STA	204,158	0	204,095	100,000	0	100,000
City of Watsonville		0	0		0	0
County of Santa Cruz		15,000	15,000		15,000	15,000
County of SC-Measure D Sales Tax		1,045,000	1,045,000		981,927	981,927
CARB		202,648	202,648		202,648	202,648
LCTOP		7,000	7,000		7,360	7,360
Transfer From Measure D Reserve		0	0		0	0
Area Agency on Aging-Title IIIB		20,000	20,000		45,043	45,043
FTA Section 5310-Expanded		99,500	99,500		136,674	136,674
Monterey Peninsula Foundation		40,000	40,000		40,000	40,000
Kaiser Grant			0		30,000	30,000
Outside Contracts-Other		14,675	14,675		22,776	22,776
Scrip - Client Payments		5,747	5,747		6,667	6,667
MOW Intra-Program Charges		22,500	22,500		22,500	22,500
Elderday Intra-Program Charges		270,000	270,000		118,250	118,250
Donations		15,100	15,100		8,700	8,700
Program Income-Other			0		0	0
Vehicle Maintenance Intra-Program Charges		12,099	12,157		12,157	12,157
Vehicle Sales		3,000	3,000		3,000	3,000
<b>TOTAL REVENUES</b>	<b>1,109,790</b>	<b>1,772,269</b>	<b>2,882,059</b>	<b>959,367</b>	<b>1,652,702</b>	<b>2,612,069</b>

<b>OPERATING FUND SOURCES</b>	<b>CTSA FINAL FY 20-21</b>	<b>CTSA BUDGET FY 21-22</b>	<b>CTSA BUDGET FY 22-23</b>
TDA	697,240	859,367	905,632
STA	100,000	100,000	204,158
TDA Reserve Fund	57,700	0	0
City of Capitola	5,900	0	0
City of Watsonville	3,500	0	0
County of Santa Cruz	15,000	15,000	15,000
County of SC-Measure D Sales Tax	923,256	981,927	1,045,000
CARB	44,952	202,648	202,648
LCTOP	33,579	7,360	7,000
FTA Section 5310-Trad	3,136	0	0
Area Agency on Aging-Title IIIB	38,043	45,043	20,000
FTA Section 5310-Expanded	122,446	136,674	99,500
Monterey Peninsula Foundation	40,000	40,000	40,000
Kaiser Grant	20,000	30,000	0
Outside Contracts-Other	2,400	22,776	14,675
Scrip - Client Payments	5,204	6,667	5,747
Scrip - Health Project Center		0	0
MOW Intra-Program Charges	22,500	22,500	22,500
Elderday Intra-Program Charges		118,250	270,000
Donations	10,335	8,700	15,100
PPP Loan Forgiveness	224,532	0	0
Vehicle Maintenance Intra-Program Charges	20,963	12,157	12,099
Vehicle Sales	6,500	3,000	3,000
<b>SUBTOTAL REVENUES</b>	<b>2,397,186</b>	<b>2,612,069</b>	<b>2,882,059</b>
SECTION 5310 - PASS THRU		0	0
CARB		0	0
LCTOP		0	0
<b>TOTAL REVENUES</b>	<b>2,397,186</b>	<b>2,612,069</b>	<b>2,882,059</b>

## EXHIBIT B

### CTSA FIVE YEAR CAPITAL IMPROVEMENT PLAN 22/23 FISCAL YEARS: 22/23 THROUGH 26/27

CAPITAL REVENUE					
	Projected 2022-2023	Projected 2023-2024	Projected 2024-2025	Projected 2025-2026	Projected 2026-2027
Fund Balance	\$103,326	\$115,748	\$91,265	\$41,265	\$41,368
FTA Section 5310		\$210,000	\$0	\$210,000	\$0
Addition to Fund	\$55,706				
Fund Interest	\$258	\$289	\$228	\$103	\$104
<b>Total</b>	<b>\$159,290</b>	<b>\$326,037</b>	<b>\$91,265</b>	<b>\$251,368</b>	<b>\$41,472</b>
CAPITAL EXPENDITURES					
	2022-2023	2023-2024	2024-2025	2025-2026	2026-2027
Equipment Purchase	\$49,544	\$234,772	\$50,000	\$210,000	\$0
Major Maintenance	\$0	\$0	\$0	\$0	\$0
<b>Total</b>	<b>\$43,542</b>	<b>\$234,772</b>	<b>\$50,000</b>	<b>\$210,000</b>	<b>\$0</b>
<b>Year-End Balance</b>	<b>\$115,748</b>	<b>\$91,265</b>	<b>\$41,265</b>	<b>\$41,368</b>	<b>\$41,472</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 TOA fund balance, an additional 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, that began in January, 2021. A final payment of \$24,772 will be made in FY 2023-2024.
3. Lift Line is applying for \$210,000 in equipment funding for vehicle and computer purchase in FY 2023-2024 and 2026-2027.
4. FY 2024-2025 is a projected \$50,000 matching fund expense for EV projects.

**EXHIBIT C-1**  
**Lift Line / CTSA**  
**FY22/23 OPERATING PLAN**

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

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

**Lift Line is seeking to continue TDA Medical Rides service and ensure this service reaches those with the most need. Lift Line projecting 6,027 TDA Medical Rides for FY 22/23.** The TDA Medical Rides program serves as a safety net service for medical rides outside the ADA-mandated METRO paratransit service areas. Eligible individuals may schedule rides to medical destinations as late as one day in advance, with no fares collected. Currently all of the residents that receive medical rides are low income and below the federal 200% poverty level. Lift Line staff continue to update participant applications to reflect the new Federal Government poverty level guidelines to ensure income and disability eligibility is maintained by participants.

**Lift Line also coordinates with the local taxi companies to offer the Taxi Scrip (TS) program. Lift Line is projecting 2,279 Taxi Scrip rides in FY 22/23.**

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

**Lift Line is projecting 7,099 Meals on Wheels rides for FY 22/23. 4,465 of which will be funded with TDA funds.**

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



**Lift Line is projecting 20,120 Elderday rides in FY 22/23, of which 8,700 are funded by TDA.**

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

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

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

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

Through TDA funding, Lift Line will continue to serve those not eligible for METRO ParaCruz service, specifically low-income individuals who cannot afford the \$8.00 to \$12.00 round-trip METRO ParaCruz fare, those who don't meet the strict ADA qualifications, and those with origins/destinations outside of the METRO ParaCruz service area. 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  
2022/2023**

**TABLE 1 - TDA/STA PROPOSED SERVICE UNITS**

	TAXI SCRIP	MEDICAL TDA	MEALS ON WHEELS	ELDERDAY	STA FUNDING	TOTAL UNITS	TOTAL
FUNDS ALLOCATED	\$47,584	\$499,187	\$97,466	\$205,689	\$204,158	24,097	\$1,054,084
OPERATING COST	\$12.78	\$31.77	\$11.65	\$12.26	\$42.31		
A. PROGRAM MANAGEMENT i.e., Mgmt Personnel: Director, Fleet Mgr, Admin Asst, Info Mgr, Rent, Liability Insur., Phone, Supplies, etc.	\$5.07	\$31.38	\$7.67	\$7.72	\$24.13		
B. ADMINISTRATION 14.5314% of total cost per unit.	\$3.03	\$19.67	\$2.51	\$3.66	\$11.30		
TOTAL COST PER SERVICE UNIT	\$20.88	\$82.83	\$21.83	\$23.64	\$77.74		
22/23 PROJECTED TDA/STA UNITS OF SERVICE	2,279	6,027	4,465	8,700	2,626	24,097	
EQUIPMENT PURCHASE MATCH							\$55,706
TOTAL TDA/STA CLAIM REQUEST							\$1,109,790

**NON-TDA SUPPORTED**

**TABLE 2 - OTHER CTSA SERVICE UNITS**

	Meals on Wheels	Elderday Services	Measure D Paratransit	5310 Medical	Total Units	Total
Funds Allocated	\$57,500	\$270,000	\$514,028	\$99,500		\$941,028
Revenue per Service Unit	\$21.83	\$23.64	\$98.85	\$77.74		
21/22 Projected Units of Service	2,634	11,420	5,200	1,280	20,534	
Other Income						\$90,621
Total Operating Income						\$1,031,649
Measure D Facility/Equip/Project Funds						\$530,972
CARB - Capital Equipment						\$202,648
LCTOP						\$7,000
TDA/ STA Claim						\$1,109,790
Grand Total						\$2,882,059

**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/5310 Medical	Meals on Wheels	Elderday Services	Measure D Paratransit	STA	Total Units
21/22 Total Ride Projections	2,279	7,307	7,099	20,120	5,200	2,626	44,631

**Exhibit D**  
**Schedule of Payment**  
**FY: 2022-2023 TDA and STA**  
**Claim Lift Line CTSA**

<b>TDA</b>	
July 15, 2021	\$298,858.00
October 15, 2021	\$202,258.00
January 15, 2022	\$202,258.00
April 15, 2022	\$202,258.00
<b>Total</b>	<b>\$905,632.00</b>

<b>STA</b>	
1st Quarter	\$51,039.50
2 <sup>nd</sup> Quarter	\$51,039.50
3 <sup>rd</sup> Quarter	\$51,039.50
4 <sup>th</sup> Quarter	\$51,039.50
<b>Total</b>	<b>\$204,158.00</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**  
**22/23 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 pursuant to the Social Service Transportation Improvement Act. The purpose of the CTSA is to improve transportation required by social service recipients by promoting the consolidation and coordinating of social service transportation. As the Consolidated Transportation Service Agency, Community Bridges Lift Line will continue to coordinate and consolidate transportation services with other transportation and human service agencies in order to provide the most efficient transportation possible. Lift Line will continue to work with Santa Cruz County School Districts, Human Services Department of the County of Santa Cruz, County Office of Education, Veterans Service Offices in Santa Cruz and Palo Alto, Hospice of Santa Cruz County, as well as hospitals and other medical facilities. Community Bridges Lift Line will also continue working closely with the RTPA and to help with the unmet needs identified in the Tri-County AMBAG Coordinated Plan. Community Bridges Lift Line will also continue working with local non-profit organizations and other human service and medical facilities in neighboring counties to continue to define and create an effective mobility management center to help mobilize resident with various disabilities, low income and senior populations to travel easily throughout our County as well as to travel seamlessly throughout our tri-county Monterey Bay region and the San Francisco Bay Area.

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

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

**Exhibit F**  
**Reporting Period and**  
**Performance Measures FY:**  
**2022-2023 TDA Claim**  
**Community**  
**Bridges' Lift Line**  
**CTSA**

	<b>Reporting Period</b>	<b>Due</b>
<b>1.</b>	Fiscal Year: 2021/22	11/15/22
<b>2.</b>	1 <sup>st</sup> Quarter, 7/1/22 through 9/30/22	01/15/23
<b>3.</b>	2 <sup>nd</sup> Quarter, 10/1/22 through 12/31/22	04/15/23
<b>4.</b>	3 <sup>rd</sup> Quarter, 1/1/23 through 3/31/23	07/15/23
<b>5.</b>	4 <sup>th</sup> Quarter, 4/1/23 through 6/30/23	11/15/23
<b>6.</b>	Annual Evaluation, Fiscal Year 2022/2023	11/15/23

**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
<b>11.</b>	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 cancelation

Agency Board Resolution  
**RESOLUTION # 2022-04-01**

RESOLUTION AUTHORIZING COMMUNITY BRIDGES/LIFT LINE TO MAKE A CLAIM FOR FY22/23 TDA/STA FUNDS FROM THE REGIONAL TRANSPORTATION COMMISSION THROUGH THE CITY OF SANTA CRUZ

**WHEREAS**, the Transportation Development Act (TOA) 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 TOA 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 TOA 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 TOA 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 TOA claim.

**PASSED AND ADOPTED by Community Bridges Board of Directors** of the *Santa Cruz County*, State of California. Passed by unanimous consent by proxy vote by the Governance Committee of the Board of Directors on 4/27/22.



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Jack Jacobson, Chair



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Sara Siegel, Secretary

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

**FROM:** Amanda Marino, Transportation Planner

**RE:** FY 2022-23 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 and recommend approval by the Regional Transportation Commission the FY 2022-23 claim from the Santa Cruz Metropolitan Transit District for:
  - a. TDA-Local Transportation Fund (TDA) funds in the amount of \$9,218,043; and,
  - b. State Transit Assistance Funds (STA) funds in the amount of \$4,476,025.

## **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 Regional Transportation Commission (RTC) is also responsible for allocating State Transit Assistance (STA) funds, which are generated from the sales tax on diesel fuel. The RTC's FY 2022-23 budget was approved by the RTC at its April 2022 meeting including TDA and STA apportionments based on the Santa Cruz County Auditor's and State Controller's Office (SCO) estimates.

## **DISCUSSION**

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

The Regional Transportation Commission (RTC) FY 2022-23 budget includes Transportation Development Act (TDA) apportionments for the Santa Cruz Metropolitan Transit District (Metro) in the amount of \$9,218,043. Consistent with the RTC's Rules and Regulations, this is 85.5% of the TDA revenues that are apportioned by the RTC to transit, paratransit and local jurisdictions' bike and pedestrian projects. Metro has proposed to use FY 2022-23 TDA funding and State Transit Assistance (STA) funding to support Metro's fixed-route public transit operations and American's with Disabilities Act (ADA) complementary paratransit operations which require 76 vehicles and serves 25 routes throughout Santa Cruz County. Metro estimates it will provide 4,099,250 fixed-route and ParaCruz passenger trips in FY 2022-23. ParaCruz is Metro's complementary paratransit service, which operates 32 accessible vans. Metro estimates it will provide 62,472 paratransit one-way trips in FY 2022-23, 160% higher than the 38,974 actual trips

carried in FY 2021. 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's transit system. The FY 23 ridership estimate is based upon a FY19 actual pre-COVID-19 pandemic ridership reduction by 20% in fixed-route and 15% decrease in ParaCruz passenger trips.

### ***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 \$4,680,183 in STA funds are estimated to be available in FY 2022-23 for transit projects and services in Santa Cruz County including: \$2,430,458 in RTC's population-based formula funds, \$2,249,725 in METRO's revenue-based formula share.

METRO and Lift Line have requested and staff recommends that the RTC designate 8.4% of the RTC's FY 2022-23 discretionary share (99313) to Lift Line and the balance to METRO. This postpones the RTC's September 2019 action, which would have made 15% of STA and SGR funds available to any public transit or community transportation services operators starting in FY 2022-23. As shown in METRO's TDA/STA claim ([Attachment 1](#)), METRO proposes to use \$4,476,025 in STA funds for fixed-route paratransit operating, capital, and administrative costs.

### ***State of Good Repair***

Senate Bill 1-Road Repair and Accountability Act of 2017 created a State of Good Repair program, which allocates a portion of the state Transportation Improvement Fee on vehicle registrations to transportation planning agencies (RTC locally) and transit operators (Metro locally) using STA population and revenue-based formulas. SGR funds are available for eligible transit maintenance, rehabilitation and capital projects. For FY22/23 the SCO estimates approximately \$121 million will be available statewide, with \$400,315 in SGR program funds allocated to RTC and \$370,546 allocated to METRO. METRO proposes to use the RTC and METRO shares of FY22/23 SGR funds (\$770,861) to contribute towards \$3,000,000 in capital funding to procure replacement buses for ParaCruz, METRO's complementary paratransit service. **Since Caltrans has not yet released guidelines for 2022 SGR funds, staff will return later this year with recommendations for those funds.**

### ***Future STA Apportionments***

In 2017, with Senate Bill 1 increasing state funds allocated to the State Transit



Assistance (STA) program, the RTC adopted a policy to gradually make 25% of RTC-shares of STA funds available to any eligible transit or community transportation operator. Consistent with state goals and guidelines, the RTC should consider program and service benefits when determining use of the funds. In 2019, the RTC decided to postpone making funds available to any eligible operator until FY22/23. However, given impacts of the COVID-pandemic on METRO and Lift Line, RTC staff recommends that the RTC approve the METRO and Lift Line request to make 8.4% of STA funds available to Lift Line in FY22/23 and allocate the balance to METRO. Given priorities identified in the Unmet Transit Needs list and that COVID-ridership recovery may take some time, **staff also recommends that the RTC indicate its intent to allocate FY23/24 and FY 24/25 funds by this same formula (8.4% of STA-99313 funds to Lift Line and balance to METRO). Staff recommends that the E&DTAC provide input on this option.**

**Staff recommends that the E&D TAC review the FY 2022-23 claim for TDA and STA 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 claim for State Transit Assistance (STA) and SGR funds. METRO staff will provide an overview of their TDA and STA funded transportation services at the meeting and will be available to answer questions.

Attachment 1: FY 2022-23 Santa Cruz Metro TDA and STA Claim

*I:\E&DTAC\TDA\METRO\2023\SR\_TDA\_METRO.DOCX*

**Attachment 1**

April 12, 2022

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 FY23 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 FY23 TDA-Local Transportation Fund (TDA-LTF) revenue to the operating budget and its FY23 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 FY23& FY24 Preliminary Operating Budget and the FY23 Preliminary Capital Budget attached to the Claim form.

Santa Cruz METRO requests a total of \$14,464,929 in TDA-LTF and TDA-STA funds allocated in the Santa Cruz County Regional Transportation Commission's FY23 Work Program and Budget as summarized below:

TDA – LTF FY23 Transit Operations	\$9,218,043
TDA – STA FY23 \$204,158 less of Sec 99313 Operations and Capital	\$2,226,300
TDA – STA FY23 99314 Operations and Capital	\$2,249,725
STA-SGR FY23 100% of 99313 Vehicle Replacements	\$400,315
STA-SGR FY23 99314 Vehicle Replacements	\$370,546
Total	\$14,464,929

If TDA funding levels vary from the budgeted amount during FY23, the SCCRTC will revise the TDA allocations to METRO in accordance with an amended FY23 SCCRTC Work Program and will pay METRO the revised amount of TDA funds without further action from METRO.

The FY23 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,

Dawn Crummié,  
Interim CEO/General Manager

cc: Maura F. Twomey, AMBAG

**DATE:** April 12, 2022

**TO:** Executive Director, SCCRTC

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

**SUBJECT: FY23 TDA FUNDS DISBURSEMENT REQUIREMENT**

METRO requests disbursement of the Santa Cruz Metropolitan Transit District's FY23 TDA claim for \$9,218,043 in TDA-LTF funds, \$4,476,025 in TDA-STA funds, and \$770,861 in STA-SGR funds as follows:

1. TDA-LTF FUNDING FOR FY23

<u>Disbursement Schedule</u>	<u>Operating Funds</u>	<u>Total Disbursement</u>
First Quarter	\$2,304,510.75	\$2,304,510.75
Second Quarter	\$2,304,510.75	\$2,304,510.75
Third Quarter	\$2,304,510.75	\$2,304,510.75
Fourth Quarter	\$2,304,510.75	\$2,304,510.75
Total	\$9,218,043	\$9,218,043

2. TDA-STA FUNDING FOR FY23 (Sec. \$204,158 less of 99313 and 100% 99314 STA)

<u>Disbursement Schedule</u>	<u>Operating Funds</u>	<u>Total Disbursement</u>
First Quarter	\$1,119,006.25	\$1,119,006.25
Second Quarter	\$1,119,006.25	\$1,119,006.25
Third Quarter	\$1,119,006.25	\$1,119,006.25
Fourth Quarter	\$1,119,006.25	\$1,119,006.25
Total	\$4,476,025	\$4,476,025

3. STA-SGR FUNDING FOR FY23 (Sec. 100% of 99313 and 99314 SGR)

<u>SGR Disbursement Schedule</u>	<u>Capital</u>
First Quarter	\$192,715.25
Second Quarter	\$192,715.25
Third Quarter	\$192,715.25
Fourth Quarter	\$192,715.25
Total	\$770,861

FY23 TDA funds will be used for fixed-route and paratransit operating, capital and administrative costs as shown on the FY23 TDA Claim Form and in the *Santa Cruz Metropolitan Transit District FY23 & FY24 Preliminary Operating Budget* and the *FY22 Preliminary Capital Budget*, which the Board approved on 3/26/22. 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: FY23 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</b>	<b>\$9,218,043</b>
<b>TDA-STA 99313</b>	<b>\$2,226,300</b>
<b>TDA-STA 99314</b>	<b>\$2,249,725</b>
<b>SGR 99313</b>	<b>\$400,315</b>
<b>SGR 99314</b>	<b>\$370,546</b>

5. Fiscal Year (FY) for which funds are claimed: FY23
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 4 Public Transportation

☐ Article 8 Specialized Transportation

☐ Article 3 & 8 TDA Admin or Planning

7. Contact Person/Project Manager

- a. Name: Dawn Crummié, Interim CEO/General Manager

Telephone Number: (831) 426-6080. Email: [DCrummie@scmtd.com](mailto:DCrummie@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 \$13,694,068 for fixed-route public transit and Americans with Disabilities Act of 1990 (ADA) complementary paratransit operations in Santa Cruz County and \$770,861 for capital improvements. Fixed-route public transit operations require a maximum fleet of 76 buses serving 25 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. FY23 SGR Capital funds (\$770,861) transferred to the capital budget of \$3,000,000 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 buses that are beyond their useful lifespan. The COVID-19 pandemic has significantly increased METRO's transit operating costs while farebox revenue has continued to decrease longer than anticipated. 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. Without this funding, METRO may be required to drastically curtail service and delay critical capital projects, impacting the freedom of mobility for individuals with disabilities; public transportation for health care workers, law enforcement, first responders, and other safety personnel; and Medicaid recipients who receive medical transportation for kidney dialysis, cancer treatments, and other critical care. 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 zero emission buses (ZEBs) to transition to a 100% zero-emission fleet by 2040. Furthermore, METRO's existing bus yard is limited in its ability to accommodate the footprint required for fueling/charging, operating and maintenance infrastructure for a full fleet of ZEBs. A new Zero-Emissions Operating and Maintenance Facility in the South County is necessary for METRO to fully transition to zero-emission buses by 2040. However, transitioning to ZEB fleet will require significant capital investment in real estate acquisitions and construction of Zero-Emissions Operating and Maintenance Facility to accommodate ZEB buses in the future.

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 FY23, METRO projects 4,099,250 fixed-route and ParaCruz passenger trips based upon a FY19 actual pre-COVID-19 pandemic ridership reduction by 20% in fixed-route and 15% decrease in ParaCruz passenger trips. The FY23 ParaCruz ridership estimate is 62,472 trips, 160% higher than the 38,974 actual trips carried in FY21. The FY23 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?

a. **Yes**, METRO's FY23 TDA/STA project conforms to these goals and targets in the *2040 RTP, Transportation Goals, Policies and Targets*:

i. **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)

1. **Targets:**

- a. 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).
- b. 1B. Reduce per capita fuel consumption and greenhouse gas emissions by 5 percent by 2035 and 6 percent by 2040. (Attachment 3, p. 1).
- c. 1E. Increase the number of active transportation trips by 20% of all trips by 2040. (Attachment 3, p. 2).

ii. **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.

1. **Targets:**

- a. 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 \$13,694,068 in farebox revenue together with sufficient advertising, local sales tax, rental and interest income to meet the 50% match for operating funds.



- a. What is the total project cost?

\$57,292,340 for FY23 operations and \$3,000,000 for capital improvements as published in the *Santa Cruz Metropolitan Transit District FY23 and FY24 Preliminary Line Item Operating Budgets and FY23 Capital Budget for review and TDA/STA claims purposes*, Attachment A. Revenue sources for capital improvements (replacement buses) are \$770,861 in SGR capital; \$2,428,170 FY23 Measure D transferred from operating budget.

- b. Is project fully funded? Yes

- c. 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 3/26/22 meeting, METRO's Board adopted the FY23 & FY24 Preliminary Operating Budget for the purpose of submitting the TDA claim in the amounts requested with this claim. (e.g. 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

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 Zero-Emission Watsonville Circulator Operating Project deployed two of METRO's battery-electric buses on a new circulator route in downtown Watsonville in the Fall of 2021. This project also includes a free fare pilot program offered to all riders for one year. The new route provides more frequent service to desirable commercial and professional destinations in Watsonville. It runs from 8:44am – 7:14pm and provides 16 daily round trips, seven days a week, 52 weeks out of the year. The project will not only supplant the greenhouse gas emissions from a fossil-fueled bus, but it will also create a more productive route with ridership anticipated to exceed the current route. The route connects the Downtown Transit Center with primary retail and medical destinations in Watsonville. This new route operates a clockwise loop and a counter-clockwise loop from Watsonville Transit Center, serving Main Street, Green Valley Road, Freedom Centre, Freedom Boulevard, and Lincoln Street, connecting commuters with existing local and intercity Bus Lines 69A, 69W, 71, 72/72W, 74S, 75, 79 and 91X. The Circulator Route is envisioned to become a critical link for our community.
  - METRO launched its first on-demand transit service, Cruz On-Demand. This pilot program was a shared ride experience on smaller vans, operated by METRO's trained ParaCruz operators, extending METRO's service area three quarters of a mile from any of METRO's fixed bus routes, excluding Highway 17 and the University of California Santa Cruz (UCSC) campus.
  - 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 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 will purchase and install Automatic Passenger Counters (APCs). APCs will help METRO optimize efficiency, enhance service and facilities planning, and improve customer safety and reliability. The purchase and installation of an automated, robust, and scalable ridership data management and analytics software platform, a first for METRO, will allow staff to collect real time boarding and alighting information on 100% of its fleet. Currently, ridership information is only available on an extremely limited basis through manually-conducted surveys. APCs will remove many of the current manual data entry steps required for collecting ridership data while alleviating laborious data processing activities and data manipulation. Future service, fleet and facility needs depend on obtaining accurate ridership information on where and when customers are boarding.  
The APC module will also give passengers the opportunity to make informed decisions on which vehicle they feel comfortable riding. Having a fleet that is 100% APC-equipped will provide accurate passenger load information (PLI) for passengers on all buses, enhancing service quality and boosting customer confidence in METRO services during the COVID-19 pandemic and after.
  - METRO will continue Zero-Emission Watsonville Circulator Project for two more years. This project also includes a free fare program offered to all riders for two more years.
  - Develop a master plan for the South County Zero-Emissions Operating and Maintenance Facility necessary for METRO to fully transition to zero-emission buses by 2040.
  - Purchase up to 18 CNG buses replace diesel buses to help bring the fleet into a state of good repair. This will allow METRO more time to test ZEB technology, to plan and build ZEB infrastructure, and to allow the ZEB market to continue to mature while avoiding early retirement of the significant investment made in CNG fueling tanks.
  - 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.
  - 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. While normal pre-COVID-19 annual ridership is typically around 5 million passenger trips per year, the impacts of the pandemic on ridership resulted in METRO delivering 907,140 trips in FY21 (year ended June 30, 2021). The ongoing pandemic continues to impact METRO ridership, with ridership down year-over-year an average of 50% by the end of January 2022.

- b. Per TDA Fiscal Years 2016-2018 Triennial Performance Audit recommendation, METRO intends to continue to use only “50% expenditure limitation” rather than farebox recovery in the TDA claims form to be consistent with METRO audited financial statements.
- c. METRO and Lift Line requested the RTC to allocate eight and four tenths percent per year of the RTC’s population shares (PUC 99313) of FY22/23-FY24/25 STA funds to Lift Line and to pass through the balance of the RTC’s FY22/23-FY24/25 STA and 100% of the region’s population shares (PUC 99313) of FY22/23-FY24/25 SB1-STA of Good Repair (SGR) funds to METRO.

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

- a. ☒ SCMD – April each year
- b. ☐ Specialized Transportation: Quarterly<sup>1</sup> to E/D TAC, RTC \_\_\_\_\_ (Months/Year)
- c. ☐ CTSA: Bicycle Committee \_\_\_\_\_ (Month, year); RTC \_\_\_\_\_ (Month, year)
- d. ☐ 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.

<b>Santa Cruz Metropolitan Transit District</b>					
<b>50 Percent Expenditure Limitation Calculation - FY23</b>					
Source: FY23 Preliminary BUDGET presented to Budget Committee 3/11/22					
1	Total Operating Cost			\$ 57,292,340.00	
2	Total Depreciation			\$ 5,307,687.00	
3	Total Capital Outlay			\$ 16,201,870.00	
4		Total Lines 1,2,& 3			<b>\$ 78,801,897.00</b>
5a	Less: Federal Ops Grants Rec'd			\$ 11,406,383.00	
5b	Less: Federal Capital Grants Rec'd			\$ 3,824,514.00	
6	Less: LTF Capital Intensive			\$ -	
7	Less: STAF Received			\$ 4,229,177.00	
8		Total Lines 5,6 & 7			<b>\$ 19,460,074.00</b>
9		Total Line 4 Less Line 8			<b>\$ 59,341,823.00</b>
10	50% of Line 9			<b>\$ 29,670,912.00</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>\$ 29,670,912.00</b>
14	Total LTF Applied to Operations				<b>\$ 7,692,554.00</b>
Conclusion: METRO should meet the 50% Expenditure Limitation eligibility requirement for TDA-LTF.					

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 FY23 preliminary operating budget shows an increase of 6% over the final FY22 budget.

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

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 FY17– FY21 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 FY23, TDA funds will contribute an estimated \$3.10 per fixed-route passenger trip and \$17.32 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: Interim CEO/General Manager Date: 4/12/2022

## TDA Standard Assurances Checklist

**Claimant:** Santa Cruz Metropolitan Transit

**Fiscal Year:** FY2

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>	MD
<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>	MD
<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.	MD
<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."	MD
<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.	MD
<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	MD
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.	MD
<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.	MD

<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.	MD
<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.	MD
<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.	MD

Santa Cruz Metropolitan Transit District

(Legal Name of Applicant/Claimant)

(Authorizing Signature of CEO/CFO)

Dawn Crummié, Interim CEO/General Manager

(Name and Title)

Santa Cruz METRO Operating Financials					
Operating Expenses	FY17	FY18	FY19	FY20	FY21
Local Fixed-Route Expenses	\$ 35,789,455.00	\$ 36,986,119.00	\$ 39,026,374.87	\$ 40,910,900.03	\$ 37,070,657.68
Highway 17	\$ 4,415,938.00	\$ 4,673,012.00	\$ 4,932,146.00	\$ 5,154,746.0	\$ 6,799,943.00
Paratransit	\$ 4,904,633.00	\$ 5,020,672.00	\$ 5,150,526.00	\$ 5,375,211.0	\$ 5,112,615.00
<b>TOTAL Operating Expenses*</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>	<b>\$ 48,983,215.68</b>
Operating Revenue	FY17	FY18	FY19	FY20	FY21
Fixed-Route Fares	\$ 2,849,064.00	\$ 2,631,707.00	\$ 2,546,822.81	\$ 1,853,675.2	\$ 856,878.52
Fares-Contracts	\$ 4,424,951.00	\$ 5,273,571.00	\$ 5,330,372.73	\$ 4,059,315.5	\$ 3,190,854.08
Highway 17 Fares	\$ 1,644,388.00	\$ 1,564,281.00	\$ 1,549,495.90	\$ 1,068,135.7	\$ 204,022.22
Highway 17 Payments	\$ 503,961.00	\$ 523,636.00	\$ 526,429.80	\$ 534,911.2	\$ 532,338.81
ParaCruz Fares	\$ 298,506.00	\$ 287,363.00	\$ 285,840.50	\$ 217,664.0	\$ 114,807.00
Sales Tax	\$ 20,869,028.00	\$ 24,889,095.00	\$ 25,965,463.57	\$ 24,964,186.4	\$ 28,707,450.10
Federal Transit Administration (FTA)	\$ 6,454,874.00	\$ 6,738,883.00	\$ 6,969,093.00	\$ 25,752,598.0	\$ 16,404,147.00
Transit Development Act (TDA)	\$ 6,804,838.00	\$ 6,767,933.00	\$ 7,288,209.00	\$ 7,930,060.0	\$ 7,096,904.00
State Transit Assistance (STA)	\$ 2,041,333.00	\$ 3,196,463.00	\$ 4,253,929.00	\$ 4,346,687.0	\$ 3,425,215.00
Misc. Revenue	\$ 903,922.00	\$ 1,081,108.00	\$ 987,623.68	\$ 1,868,759.8	\$ 977,018.37
Transfers From/(To) Reserves	\$ (1,684,839.00)	\$ (6,274,237.00)	\$ (6,594,233.13)	\$ (21,155,135.8)	\$ (12,526,419.42)
<b>TOTAL Operating Revenue</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>	<b>\$ 48,983,215.68</b>
Santa Cruz METRO Operating Statistics					
System Information	FY17	FY18	FY19	FY20	FY21
Directional Route Miles	398.37	398.65	381.96	387.12	387.26
Number of Bus Stops	931	845	824	825	813
Number of Routes	25	26	24	24	24
Total Active Fleet	98	100	101	94	94
Maximum Bus In-Svc	75	76	74	75	54
Total METRO Employees	311	319	303	312	291
Revenue Hour Per Employee	671	651	684	571	516
Local Fixed-Route Performance	FY17	FY18	FY19	FY20	FY21
Ridership	4,787,727	4,758,093	4,760,464	3,344,208	861,059
Revenue Hours	186,066	184,384	184,077	160,107	138,134
Revenue Miles	2,283,490	2,255,016	2,262,484	1,966,903	1,801,241
Passengers Per Hour	25.73	25.81	25.86	20.89	6.23
Passengers Per Mile	2.10	2.11	2.10	1.70	0.48
Passengers Per Capita	20.18	17.57	17.58	14.10	3.18
Revenue Hours Per Capita	0.78	0.68	0.68	0.67	0.51
Revenue Miles Per Capita	9.63	8.33	8.35	8.29	6.65
Total Cost Per Passenger	\$7.48	\$7.77	\$8.20	\$12.23	\$43.05
Revenue Per Passenger	\$1.52	\$1.66	\$1.65	\$1.77	\$4.70
Farebox Recovery	20.32%	21.37%	20.18%	14.45%	10.9%
Highway 17 Performance	FY17	FY18	FY19	FY20	FY21
Ridership	303,667	290,419	285,508	200,249	46,081
Revenue Hours	22,731	23,296	23,271	18,029	12,086
Revenue Miles	611,805	603,289	606,029	500,933	329,477
Passengers Per Hour	13.36	12.47	12.27	11.11	3.81
Passengers Per Mile	0.50	0.48	0.47	0.40	0.14
Passengers Per Capita	1.28	1.07	1.05	0.74	0.17
Revenue Hours Per Capita	0.10	0.09	0.09	0.07	0.04
Revenue Miles Per Capita	2.58	2.23	2.24	1.85	1.22
Total Cost Per Passenger	\$14.54	\$16.09	\$17.27	\$25.74	\$147.57
Revenue Per Passenger	\$7.07	\$7.19	\$7.27	\$8.01	\$15.98
Farebox Recovery	37.24%	33.47%	31.42%	20.72%	3.00%
Fixed-Route Total Performance	FY17	FY18	FY19	FY20	FY21
Ridership	5,091,394	5,048,512	5,045,972	3,544,457	907,140
Revenue Hours	208,797	207,680	207,348	178,136	150,220
Revenue Miles	2,895,295	2,858,305	2,868,513	2,467,836	2,130,718
Passengers Per Hour	24.38	24.31	24.34	19.90	6.04
Passengers Per Mile	1.76	1.77	1.76	1.44	0.43
Passengers Per Capita	22.74	19.71	19.68	13.83	3.52
Revenue Hours Per Capita	0.98	0.85	0.85	0.72	0.60
Revenue Miles Per Capita	12.20	10.55	10.59	9.11	7.87
Total Cost Per Passenger	\$ 7.90	\$ 8.25	\$ 8.71	\$ 13.00	\$ 48.36
Revenue Per Passenger	\$ 1.85	\$ 1.98	\$ 1.97	\$ 2.12	\$ 5.27
Farebox Recovery	22.18%	22.73%	21.44%	15.15%	9.7%
Subsidy Per Passenger	\$ 6.05	\$ 6.27	\$ 6.74	\$ 10.88	\$ 43.09
Cost Per Revenue Hour	\$ 192.56	\$ 200.59	\$ 212.00	\$ 258.60	\$ 292.04
ParaCruz Performance	FY17	FY18	FY19	FY20	FY21
Ridership	75,116	72,209	73,497	61,631	38,974
Revenue Hours	39,474	38,779	44,804	35,181	23,092
Revenue Miles	456,208	451,985	464,816	356,875	234,764
Passengers Per Hour	1.90	1.86	1.64	1.75	1.69
Passengers Per Mile	0.16	0.16	0.16	0.17	0.17
Passengers Per Capita	0.32	0.27	0.27	0.23	0.14
Revenue Hours Per Capita	0.17	0.14	0.17	0.13	0.09
Revenue Miles Per Capita	1.92	1.67	1.72	1.32	0.87
Total Cost Per Passenger	\$ 65.29	\$ 69.53	\$ 70.08	\$ 87.22	\$ 131.18
Revenue Per Passenger	\$ 3.97	\$ 3.98	\$ 3.89	\$ 3.53	\$ 2.95
Farebox Recovery	6.09%	5.72%	5.55%	4.05%	2.25%
Subsidy Per Passenger	\$ 61.32	\$ 65.55	\$ 66.19	\$ 83.68	\$ 128.23
Cost Per Revenue Hour	\$ 124.25	\$ 129.47	\$ 114.96	\$ 152.79	\$ 221.40

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

\*\* Highway 17 Farebox Recovery including Highway 17

# PRELIMINARY

## SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

As of July 1, 2022

	June-20		June-21		March-22		March-22	
	BUDGET		BUDGET		BUDGET		Budget	
REVENUE:	FY21	FY22	FY23	%VAR	Increase/(Decrease)	\$ VAR	FY24	% VAR
<b>Operating Revenue</b>								
Passenger Fares	\$ 4,152,166	\$ 2,294,699	\$ 2,409,682	\$	114,983	5.0%	\$ 2,463,701	\$ 54,019 2.2%
Special Transit Fares	6,102,606	6,024,734	5,952,851		(71,883)	(1.2%)	6,071,590	118,739 2.0%
<b>Total Operating Revenue</b>	<b>\$ 10,254,772</b>	<b>\$ 8,319,433</b>	<b>\$ 8,362,533</b>	<b>\$</b>	<b>43,100</b>	<b>0.5%</b>	<b>\$ 8,535,291</b>	<b>\$ 172,758 2.1%</b>
<b>Operating Expense</b>								
Labor - Regular	\$ 18,751,562	\$ 18,921,745	\$ 19,294,218	\$	372,473	2.0%	\$ 19,650,047	\$ 355,829 1.8%
Labor - OT	1,557,535	1,133,162	1,324,573		191,411	16.9%	1,352,585	28,012 2.1%
Fringe	20,622,009	20,480,574	20,976,098		495,524	2.4%	21,855,346	879,248 4.2%
Non-Personnel	9,633,082	10,307,612	10,651,765		344,153	3.3%	11,212,755	560,990 5.3%
<b>Total Operating Expense</b>	<b>\$ 50,564,188</b>	<b>\$ 50,843,093</b>	<b>\$ 52,246,654</b>	<b>\$</b>	<b>1,403,561</b>	<b>2.8%</b>	<b>\$ 54,070,733</b>	<b>\$ 1,824,079 3.5%</b>
<b>Operating Surplus/(Deficit)</b>	<b>\$ (40,309,416)</b>	<b>\$ (42,523,660)</b>	<b>\$ (43,884,121)</b>	<b>\$</b>	<b>(1,360,461)</b>	<b>3.2%</b>	<b>\$ (45,535,442)</b>	<b>\$ (1,651,321) 3.8%</b>
<i>Farebox Recovery</i>	20.3%	16.4%	16.0%				15.8%	
<b>Non-Operating Revenue/(Expense)</b>								
Sales Tax/Including Measure D	\$ 25,889,093	\$ 26,303,319	\$ 30,774,884	\$	4,471,565	17.0%	\$ 31,390,382	\$ 615,498 2.0%
Federal/State Grants	20,156,583	19,450,954	23,328,664		3,877,710	19.9%	23,982,408	653,744 2.8%
COVID Related Costs	-	(121,347)	(297,712)		(176,365)	145.3%	(290,035)	7,677 (2.6%)
Pension UAL/Bond Payment*	(4,434,221)	(5,650,261)	(4,747,974)		902,287	(16.0%)	(4,445,271)	302,703 (6.4%)
All Other Revenue	962,950	677,171	698,218		21,047	3.1%	711,477	13,259 1.9%
<b>Total Non-Operating Revenue/(Expense)</b>	<b>\$ 42,574,405</b>	<b>\$ 40,659,836</b>	<b>\$ 49,756,080</b>	<b>\$</b>	<b>9,096,244</b>	<b>22.4%</b>	<b>\$ 51,348,961</b>	<b>\$ 1,592,881 3.2%</b>
<b>Operating Surplus/(Deficit) before Transfers</b>	<b>\$ 2,264,991</b>	<b>\$ (1,863,824)</b>	<b>\$ 5,871,959</b>	<b>\$</b>	<b>7,735,783</b>	<b>(415.0%)</b>	<b>\$ 5,813,519</b>	<b>\$ (58,440) (1.0%)</b>
<b>Transfers and Other</b>								
Transfers to Capital/Bus Replacement/Sustainability Funds	\$ (2,264,991)	\$ (4,414,734)	\$ (7,428,170)	\$	(3,013,436)	68.3%	\$ (5,454,945)	\$ 1,973,225 (26.6%)
(To)/From COVID Recovery Fund	-	6,278,558	1,556,211		(4,722,347)	(75.2%)	(358,574)	(1,914,785) (123.0%)
<b>Operating Surplus/(Deficit) after Transfers</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$</b>	<b>-</b>		<b>\$ -</b>	

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
PRELIMINARY FY23 & FY24 OPERATING BUDGET**

**REVENUE SOURCES**

REVENUE SOURCE	June-20		June-21		March-22		Increase/(Decrease)		March-22		Increase/(Decrease)			
	BUDGET	FY21	BUDGET	FY22	BUDGET	FY23	\$ VAR	%VAR	PLAN	FY24	\$ VAR	% VAR		
Passenger Fares														
Fixed Route Fares	\$	2,371,000	\$	1,435,541	\$	1,621,499	\$	185,958	13.0%	\$	1,653,929	\$	32,430	2.0%
Paratransit Fares		291,566		176,531		194,184		17,653	10.0%		203,893		9,709	5.0%
Highway 17 Fares		1,489,600		682,627		593,999		(88,628)	(13.0%)		605,879		11,880	2.0%
Special Transit Fares														
UCSC		4,509,846		4,692,000		4,780,072		88,072	1.9%		4,875,673		95,601	2.0%
Cabrillo		748,840		748,840		583,388		(165,452)	(22.1%)		595,056		11,668	2.0%
City of SC		311,117		56,310		34,070		(22,240)	(39.5%)		34,753		683	2.0%
Shaffer		15,000		4,788		4,549		(239)	(5.0%)		4,321		(228)	(5.0%)
Highway 17 Payments														
VTA		330,000		350,004		375,000		24,996	7.1%		382,500		7,500	2.0%
San Jose State		22,300		12,109		-		(12,109)	(100.0%)		-		-	2.0%
Amtrak		165,503		160,683		175,772		15,089	9.4%		179,287		3,515	2.0%
Sales Tax/Including Measure D														
1979 Gross Sales Tax (1/2 cent)		22,388,476		22,746,692		26,613,630		3,866,938	17.0%		27,145,903		532,273	2.0%
2016 Net Sales Tax (Measure D)		3,500,617		3,556,627		4,161,254		604,627	17.0%		4,244,479		83,225	2.0%
Federal/State Grants														
Transp Dev Act (TDA - LTF) Funds		7,628,850		7,468,499		7,692,554		224,055	3.0%		7,923,331		230,777	3.0%
FTA Sec 5307 - Op Assistance*		4,582,912		4,763,645		5,681,512		917,867	19.3%		5,805,937		124,425	2.2%
FTA Sec 5311 - Rural Op Asst*		191,234		200,796		248,984		48,188	24.0%		254,437		5,453	2.2%
Medicare Subsidy		550		550		550		-	0.0%		550		-	0.0%
AMBAG (FTA 5304)		205,000		-		-		-	0.0%		-		-	0.0%
LCTOP Grant		-		489,213		-		(489,213)	(100.0%)		-		-	0.0%
TDA - STA - Operating (Includes SB1)		4,494,411		3,454,690		4,229,177		774,487	22.4%		4,402,344		173,167	4.1%
STIC - Op Assistance		2,702,626		2,898,561		5,475,887		2,577,326	88.9%		5,595,809		119,922	2.2%
Fuel Tax Credit		351,000		175,000		-		(175,000)	(100.0%)		-		-	0.0%

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
PRELIMINARY FY23 & FY24 OPERATING BUDGET**

**REVENUE SOURCES**

REVENUE SOURCE	June-20 BUDGET FY21	June-21 BUDGET FY22	March-22 BUDGET FY23	Increase/(Decrease)		March-22 PLAN FY24	Increase/(Decrease)	
				\$ VAR	%VAR		\$ VAR	% VAR
<b>All Other Revenue</b>								
Commissions	2,500	1,000	1,000	-	0.0%	1,000	-	0.0%
Advertising Income	343,750	150,000	195,000	45,000	30.0%	200,000	5,000	2.6%
Rent Income - SC Pacific Station	119,795	96,542	60,187	(36,355)	(37.7%)	61,633	1,446	2.4%
Rent Income - Scotts Valley	-	28,992	29,862	870	3.0%	30,560	698	2.3%
Rent Income - Watsonville TC	45,205	41,637	37,216	(4,421)	(10.6%)	38,332	1,116	3.0%
Interest Income	275,000	295,000	250,000	(45,000)	(15.3%)	252,500	2,500	1.0%
Other Non-Transp Revenue - CNG Sales	-	-	62,953	62,953	100.0%	64,212	1,259	2.0%
Other Non-Transp Revenue - All Other	176,700	64,000	62,000	(2,000)	(3.1%)	63,240	1,240	2.0%
<b>TOTAL OPERATING REVENUE</b>	<b>\$ 57,263,399</b>	<b>\$ 54,750,877</b>	<b>\$ 63,164,299</b>	<b>\$ 8,413,422</b>	<b>15.4%</b>	<b>\$ 64,619,558</b>	<b>\$ 1,455,259</b>	<b>2.3%</b>
<b>TRANSFERS TO OPERATING/CAPITAL RESERVES</b>	<b>\$ (2,264,991)</b>	<b>\$ (4,414,734)</b>	<b>\$ (7,428,170)</b>	<b>\$ (3,013,436)</b>	<b>68.3%</b>	<b>\$ (5,454,945)</b>	<b>\$ 1,973,225</b>	<b>(26.6%)</b>
<b>TRANSFERS (TO) / FROM COVID-19 RECOVERY FUND</b>	<b>\$ -</b>	<b>\$ 6,278,558</b>	<b>\$ 1,556,211</b>	<b>\$ (4,722,347)</b>	<b>(75.2%)</b>	<b>\$ (358,574)</b>	<b>\$ (1,914,785)</b>	<b>(123.0%)</b>
<b>TOTAL REVENUE SOURCES</b>	<b>\$ 54,998,408</b>	<b>\$ 56,614,701</b>	<b>\$ 57,292,340</b>	<b>\$ 677,639</b>	<b>1.2%</b>	<b>\$ 58,806,039</b>	<b>\$ 1,513,699</b>	<b>2.6%</b>
<i>* FTA funding is used solely to fund labor expense</i>								
<b>TOTAL EXPENSES</b>	<b>54,998,409</b>	<b>56,614,701</b>	<b>57,292,340</b>	<b>677,639</b>	<b>1.2%</b>	<b>58,806,039</b>	<b>1,513,699</b>	<b>2.6%</b>
<b>TRANSFERS TO BUS REPLACEMENT FUND</b>	<b>2,264,991</b>	<b>2,239,734</b>	<b>2,428,170</b>	<b>188,436</b>	<b>8.4%</b>	<b>2,454,945</b>	<b>26,775</b>	<b>1.1%</b>
<b>TRANSFERS TO OPERATING &amp; CAPITAL RESERVE FUNDS</b>	<b>-</b>	<b>-</b>	<b>3,000,000</b>	<b>3,000,000</b>	<b>100.0%</b>	<b>1,000,000</b>	<b>(2,000,000)</b>	<b>(66.7%)</b>
<b>TRANSFERS TO UAL &amp; OPEB</b>	<b>-</b>	<b>2,000,000</b>	<b>2,000,000</b>	<b>-</b>	<b>0.0%</b>	<b>2,000,000</b>	<b>-</b>	<b>0.0%</b>
<b>FUEL TAX CREDIT</b>	<b>-</b>	<b>175,000</b>	<b>-</b>	<b>(175,000)</b>		<b>-</b>	<b>-</b>	
<b>SURPLUS/(DEFICIT)</b>	<b>-</b>	<b>(6,278,558)</b>	<b>(1,556,211)</b>	<b>4,722,347</b>		<b>358,574</b>	<b>1,914,785</b>	







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

**FROM:** Amanda Marino, Transportation Planner

**RE:** FY 2022-23 Transportation Development Act Funds for Volunteer Center

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## **RECOMMENDATION**

Staff recommends that the Elderly & Disabled Transportation Advisory Committee review the FY 2022-23 claim from the Volunteer Center in the amount of \$107,814, 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 2022-23 budget was adopted by the RTC on April 7, 2022 and includes estimated TDA allocations based on the Santa Cruz County Auditor's estimates.

## **DISCUSSION**

The Regional Transportation Commission (RTC) FY 2022-23 budget includes Transportation Development Act (TDA) apportionments for the Volunteer Center in the amount of \$107,814, 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 200-250 older adults and individuals with disabilities, and projects to provide approximately 4,000 one-way trips to eligible clients in The Volunteer Center Transportation Program.

This program helps to meet critical needs of low-income seniors age 60+ and older adults that are health compromised who may require support of a volunteer to assist them with grocery shopping, transportation to medical appointments, shopping trips, as well as the added benefit of being able to provide friendly conversation to combat isolation and loneliness. These services are provided at no cost to the participants and offers door to door service reaching areas of Santa Cruz County that other transportation services may not be able to.

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 2022-23 Volunteer Center TDA Claim and operation/budget pages

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April 27, 2022

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.

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 concerns, 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



April 27, 2022

Nicholas Gong  
Finance Department  
333 Front Street S  
Santa Cruz CA 95060

Dear Nicholas,

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.

Please see Exhibit A to review Program Responsibilities and Exhibit B to review our proposed Budget for fiscal year 2022-23.

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

# 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 Program
2. Implementing Agency: Volunteer Center of Santa Cruz County
3. Sponsoring Agency (if different) – must be a TDA Eligible Claimant: City of Santa Cruz
4. Funding requested this claim: TDA– Local Transportation Funds (LTF) \$ 107,814  
STA (transit/paratransit only) \$ \_\_\_\_\_
5. Fiscal Year (FY) for which funds are claimed: FY 22/23

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 4 Public Transportation
- ☒ X Article 8 Specialized Transportation via city sponsor
- ☐ Article 3 & 8 TDA Admin or Planning

7. Contact Person/Project Manager

Name: Tara Ireland

Telephone Number: 831-427-5070 X105

E-mail: rsvpvol@scvolunteercenter.org

Secondary Contact (in event primary not available): Karen Delaney

Telephone Number: 831-427-5070

E-mail: kd@scvolunteercenter.org

8. Project/Program Description/Scope (use additional pages, if needed, to provide details such as work elements/tasks):

Please see exhibit A for Program Description/Scope.

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

Our program serves all of Santa Cruz County including underserved rural and mountain areas.

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

The Volunteer Center Transportation Program helps to meet the critical needs of many older adults and those with mobility issues who may require the support of a caring volunteer to assist them with grocery shopping, help them get to their appointments and also has the added benefit of being able to provide friendly conversation to combat isolation

and loneliness. In addition, the program is vital to many as it is free, offers door thru door service and can reach areas of our county that other transportation modes may not be able to.

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.):

Performance measure of 4,000 rides per year in addition to participant and volunteer surveys will be used to evaluate the program.

- 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):

We anticipate serving between 200-250 older adults and individuals with disabilities in 2022/2023

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

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

There will be no impact on other modes of travel.

14. Estimated Project Cost/Budget, including other funding sources, and Schedule: *(attach project budget). Specialized Transportation Claims require 10% local match 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?

\$107,814

Is project fully funded? Yes

What will TDA (and STA, if applicable) funds be used on (ex. operations, administration, brochures, engineering, construction)?

TDA funds will be used for volunteer mileage, administration, brochures/marketing recruitment, operations, volunteer recognition, insurance, personnel, background checks

15. Preferred Method and Schedule for TDA-LTF fund distribution *(see RTC Rules and Regulations for details and requirements. Note if funds are distributed in advance of use, agencies will be required to subsequently provide documentation of actual expenditures.):*

a. Bike/Ped: Cities/County: ☐ Up to 90% upon initiation of work OR ☐ 100% upon project completion  
HSA/BTW: ☐ Quarterly disbursement OR ☐ Semi-annual disbursement

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: ☐ **X 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 <u>resolution</u> (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? If yes, date RTC approved: <u>June 2021</u>	Yes
<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: _____)	NA
<b>D.</b> 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
<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> ).	NA



<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?	NA
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**Bike/Ped (Article 8) Only**

17. Project Cost/Budget, including other funding sources, and Schedule: (complete “24a” or “24b”)

- a. Capital Projects (Bicycle projects: Bicycle Advisory Committee or RTC must approve the final project design plans prior to construction; see RTC Rules & Regulations)

	Planning	Environ- mental	Design/ Engineering	ROW	Construction	Other *	Contingency	Total
<b>SCHEDULE (Month/Yr) Completion Date /</b>								
<b>Total Cost/Phase</b>								
<b>\$TDA Requested (this claim)</b>								
<b>Prior TDA:</b>								
<b>Source 3:</b>								
<b>Source 4:</b>								
<b>Unsecured/ additional need**</b>								

\*Please describe what is included in “Other”:

- b. Non-Capital Projects – Cost/Schedule: List any tasks and amount per task for which TDA will be used. Can be substituted with alternate budget format.

Work Element/Activi ty/Task	SCHEDULE (Month/Yr)	Total Cost per Element	\$ TDA requested	\$ Source 2:	\$ Source 3:	\$ Source 4:
Administration /Overhead						
Activity 1:						
Activity 2:						
Activity 3:						
Activity 4:						
Ex. Consultants						
Ex. Materials						

**SCMTD, CTSA, Bike to Work, HSA, Volunteer Center Only – PLEASE KEEP ANSWERS BRIEF**

18. 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.

Last year we began transitioning our grocery shopping program participants back to the transportation program. The majority of individuals were very happy to start receiving rides and shopping for themselves. However, we found that some homebound individuals still needed the grocery shopping support in order to have access to food and medication. For these individuals, volunteers are still able to (and enjoy) shopping for them. On occasion, volunteers may shop for an elderly, homebound senior while driving another participant to the store to shop for themselves. We expect this trend to continue for the foreseeable future for our frail, homebound 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 Program Specialist continues to improve and add features to the custom computer application (named “The Hub”) that helps to both improve efficiency and increase ridership. The addition of ride request links to Google maps has helped volunteers choose rides based on location/destination and in some cases has encouraged volunteers to fulfill multiple requests in a single outing. Along with maps, another addition to improve efficiency has been the addition of carpool/rideshare suggestions by The Hub. This feature has just been added and we are testing it on some participants and volunteers.

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

Last year our program focused on transitioning our grocery shopper participants to the transportation program as we continued to provide grocery support during the pandemic. This year we continue to support some of those same frail, homebound participants who are unable shop for themselves but will be focusing on rebuilding our volunteer driver pool and growing our transportation program. Additionally, we will have another Volunteer Center staff person supporting the Transportation Program and working to recruit more drivers.

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

SCMD – April each year

X Specialized Transportation: Quarterly<sup>1</sup> to E/D TAC, RTC in:

October 2022, January 2023, April 2023, July 2023

**SCMTD, CTSA and Volunteer Center Only**

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

Yes. The free, door thru door, volunteer supported program is a need that is not currently being offered by any other program in Santa Cruz County except for the Volunteer Center.

b. Does the project meet an unmet transit need from the most recently approved RTC Unmet Paratransit and Transit Needs List? Describe.

Yes. The Volunteer Center Transportation Program meets many of the unmet transit needs from the RTC Unmet Needs List. Below are the ways in which our program supports these needs.

**H1 Transportation services to areas with high concentrations of seniors, disabled and low income individuals.** We utilize volunteer drivers to serve low income and senior housing areas outside of the transit service area in south county. Additionally, we offer carpool options to our program participants and can offer rides to those with some mobility devices such as canes, walkers and crutches.

**H1 Specialized transportation for areas outside the ADA-mandated paratransit service area for medical, non-medical trips.** We provide volunteer drivers to provide transportation services from areas not served by transit or ADA paratransit service.

**H2 Free or low-cost paratransit options.** The Volunteer Transportation program is free to its users.

**M1 Affordable transportation for dialysis and other medical appointments, including 'same day' specialized transportation services for medical trips, on a continuous basis.** Volunteer drivers in our program offer rides to medical appointments including dialysis on a continuous basis and have occasionally offered "same day" rides. We continue to attempt to increase our capacity to offer specialized transportation services.

**H2 Volunteer drivers in Santa Cruz County particularly in south-county and San Lorenzo Valley.**

We currently offer rides to new and existing participants in these areas and seek to expand outreach efforts to recruit drivers and also promote services.

**CTSA and Volunteer Center (Article 8) Only**

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

Yes. Our staff and volunteers regularly refer individuals to transit options listed in the Specialized Transportation Guide and make suggestions of transportation services that may be able to assist them.

23. 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

24. 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)

Participants of our program are all older adults. Many are elderly and frail and some of these individuals use walkers or canes. Some participants are homebound and need a high level of support that may include the physical support of a volunteer to walk with them through the store or to an appointment. That volunteer may even help to put their groceries away or upon request sit with them in their doctor's appointments.

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

25. 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.

One suggestion from the TDA Triennial Performance Audit was: **"Volunteer Center should capture client and driver stories in its reporting on the volunteer driver program."** We have increased our participant and driver story collection and have even been able to capture audio testimonials of the program with permission of each individual. Our program has been able to use these driver and participant stories in local publications such as the Santa Cruz Sentinel and Good Times in order to attract and promote volunteers and participants.

Another suggestion from the audit was: **"City of Santa Cruz, Volunteer Center, and SCCRTC should discuss an alternative performance measure for TDA-Local Transportation Fund eligibility."** An alternative performance measure of 4,000 rides per year has been implemented in lieu of a match requirement.

- 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 have been implemented.
- Describe any problems encountered in implementing individual recommendations. There have been no problems in implementing recommendations.

<sup>1</sup> If feasible, the quarterly TDA reports submitted by Community Bridges for Lift Line as the Consolidated Transportation Services Agency (CTSA) 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 Only**

26. 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):

<b>Funds</b>	<b>Urbanized Service</b>	<b>Rural/Non-Urban Service</b> <i>(could use FTA 5311 application)</i>
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.*

27. 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).*

28. 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:

- 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 TDA Claims):**

### **All Claims**

- ☒ **X A letter of transmittal** addressed to the SCCRTC Executive Director that attests to the accuracy of the claim and all its accompanying documentation.
- ☒ **X 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
- ☐ **TDA Standard Assurances Checklist**

### **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.

**PROOF OF EXPENDITURES:** Claimant acknowledges it is required to submit all expenditure backup as well as evidence of other funding used for project to RTC, to RTC's satisfaction, before receiving periodic disbursement or disbursement upon project completion.

**CERTIFIED FISCAL AUDIT:** Claimant certifies that it has submitted a satisfactory, independent fiscal audit, with the required certification statement, to SCCRTC 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). *This requirement does not apply to new transit operators nor Bike to Work or HSA claims submitted through the SCCRTC.*

Signature Tara E. Ireland Title: Senior Programs Division Manager Date: 4/27/22

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## TDA Standard Assurances Checklist (for Transit and Specialized Transportation Services)

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

**Fiscal Year:** 22/23

Assurance	Initial
<b>1. STATE CONTROLLER REPORT</b> Claimant certifies that it has submitted a State Controller's report in conformance with the uniform system of accounts and reports, to SCCRTC 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 transit operators.</i>	TEI
<b>2. 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>3. 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>4. 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>5. 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>6. 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>7. 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>8. DRIVERS PULL NOTICE PARTICIPATION (METRO &amp; CTSA 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.	
<b>9. STAFFING ON VEHICLES (METRO &amp; CTSA 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.	

<b>10. 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>11. INCREASE IN OPERATOR'S COST PER HOUR (STA Claimants Only)</b> Claimant filing a claim for operating assistance from STA 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.	

Tara E. Ireland

(Legal Name of Applicant/Claimant)

*Karen Delaney*

(Authorizing Signature of CEO/CFO)

Karen Delaney Executive Director

(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 2022-23

**A.      TARGET POPULATION**

Seniors age 60+ and older adults with disabilities

**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      Medical requests for target population.
- 2nd Priority      Shopping requests for target population.
- 3rd Priority      Other essential destinations

These trips will be targeted for geographic distribution as follows:

	<u>Rides</u>	<u>% of Rides</u>	<u>#Clients</u>
Santa Cruz/Mid-County/Aptos/Capitola	2000	50%	100
San Lorenzo/Scotts Valley	1000	25%	50
Watsonville/ Freedom	1000	25%	50

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
4.      Volunteer Center staff will attend meetings of the E& DTAC of the RTC.

#### 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:

Quarterly Activities Report 1: October 25, 2022  
Quarterly Activities Report 2: February 8, 2023  
Quarterly Activities Report 3: April 26, 2023  
Quarterly Activities Report 4: July 26, 2023

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. CLAIM

One claim will be submitted for advance payment for the year:  
Annual Advance - July, 2022

\$ 107,814

## Exhibit B

PROGRAM NAME:

Volunteer Center Transportation

FISCAL YEAR:

2022-2023 2021-2022

REVENUES

	Budget Unit Name	Transportation	Transp/GSP
	Budget Unit Number	05	05
4000	PUBLIC SUPPORT   Donations		1,000
	4008 Unallocated Funds		
	4295 Transportation		
<b>TOTAL CURRENT YEAR REVENUES</b>		<b>107,813</b>	<b>87,351</b>
		<b>107,813</b>	<b>88,351</b>
	5001 Hourly Wages	75,390	62,682
	<b>SUBTOTAL BENEFITS &amp; TAXES.</b>	<b>107,813</b>	<b>88,351</b>
	6012 Auditing Expense	500	500
	6018 Copies	300	300
	6032 Equipment	400	500
	6151 Background Checks	550	550
	6039 Facility Maintenance	200	200
	6040 Insurance, General	630	600
	6042 Insurance, Volunteer	1,900	1,600
	6050 Postage	450	400
	6009 Recruitment/Marketing	2,000	1,500
	6061 Rent	2,000	2,000
	6078 Office Supplies	900	500
	6081 Computer Software & Fees	500	600
	6098 Mileage, Volunteers	3,500	3,000
	6100 Telecommunication	2,500	2,200
	6125 Utilities	600	500
	6150 Volunteer Recognition	400	350
	6160 Admin Fees	15,093	12,369
<b>TOTAL CURRENT EXPENSES</b>		<b>107,813</b>	<b>88,351</b>

**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 and recommend that the Regional Transportation Commission (RTC) approve Community Bridges Lift-Line's proposed Five-Year Plan (Fiscal Years 2022/23 to 2026/27) for its direct allocation of Measure D: Transit for Seniors and People Living with Disabilities investment category funds ([Attachment 1](#)).

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

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.

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.

## DISCUSSION

Including unspent balances from prior years, approximately \$1.1 million per year in Measure D formula funds are expected to be available to Community Bridges-Lift Line for the five-year period ending in Fiscal Year 2026/27 (FY26/27). Community Bridges-Lift Line's proposal for its formula share of Measure D revenues between FY22/23 through FY26/27 is attached ([Attachments 1-2](#)) and includes the following:

- A new additional part-time driver in FY22/23 and FY23/24, then full time FY24/25-26/27 and continuation of 2 other drivers positions to provide door-to-door service for expanded weekday and weekend services. 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 for extended operating hours including weekdays and weekends;
- 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 other equipment.

Lift Line proposed uses of Measure D revenues address priorities identified in the [Unmet Needs List](#) adopted by the RTC on May 5, 2022. These include (but are not limited to) Unmet Needs: Transportation services to areas with high concentrations of seniors, disabled and low income individuals (H1); Specialized transportation for areas outside the ADA-mandated paratransit service area for medical and non-medical trips (H1); Free or low-cost paratransit options (H1); support continuous funding for transportation services to meal sites, medical service center (M2); Publicity about existing specialized transportation services (L2); CTSA operating facilities (M2); and Paratransit vehicle replacements (H2).

**RTC staff recommends that the Elderly and Disabled Transportation Advisory Committee review and recommend that the RTC approve the Community Bridges-Lift Line 5-Year Program of Projects for FY22/23-26/27.** The RTC board is scheduled to review Community Bridges-Lift Line Measure D five-year plan at its June 2022 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 (FY 22/23-26/27)

Agency: Community Bridges - Lift Line

Category: Transportation for E&D

	Prior and 21/22 estimate	FY22/23	FY23/24	FY24/25	FY25/26	FY26/27	Total
Estimated Annual Measure D Allocations	\$ 4,636,744	\$1,045,000	\$1,073,000	\$1,099,000	\$1,123,000	\$1,152,000	\$ 10,128,744

Amount of Measure D Funds Programmed (includes carryover)											
Project Name/location	Description (include project purpose and complete streets components if applicable)	Prior and 21/22 estimate	FY22/23	FY23/24	FY24/25	FY25/26	FY26/27	5-year total	Other fund sources	Est. Construction start date	Major project? * (yes/no)
Driver 1 (see note below*)	Additional driver to provide expanded hours of paratransit service	\$672,210	\$ 169,033	\$ 174,949	\$ 181,072	\$ 187,410	\$ 193,969	\$ 906,434		ongoing	No
Driver 2 (see note below*)	Additional driver to provide expanded hours of paratransit service	\$672,210	\$ 169,033	\$ 174,949	\$ 181,072	\$ 187,410	\$ 193,969	\$ 906,434		ongoing	No
Driver 3 (see note below*)	Additional driver to provide expanded hours of paratransit service	\$0	\$ 61,703	\$ 64,788	\$ 181,072	\$ 187,410	\$ 193,969	\$ 688,942		ongoing	No
Driver Trainer	To support safety and service training for paratransit drivers	\$224,439	\$ 57,686	\$ 59,705	\$ 61,795	\$ 63,958	\$ 66,196	\$ 309,340		ongoing	No
Executive Assistant/Dispatcher	To support additional paratransit rides	\$241,797	\$ 56,573	\$ 58,553	\$ 60,603	\$ 62,724	\$ 64,919	\$ 303,373		ongoing	No
Outreach/Publicity	Materials and videos to promote paratransit ride availability	\$41,843	\$ 17,078	\$ 21,347	\$ 22,414	\$ 23,535	\$ 24,712	\$ 109,085		ongoing	No
Consultants / Project Managers	Facility project management-architects, environ review, design	\$227,638	\$ 23,582	\$ 23,582	\$ 23,582	\$ 23,582	\$ 23,582	\$ 117,908		ongoing	No
Operations Facility	Reserve for projected Acquisition, contruction and/or renovation expenses	\$1,929,883	\$ 620,606	\$ 450,127	\$ 342,390	\$ 341,972	\$ 330,684	\$ 2,085,778	2.3M Bank and Owner Financing	Started 2019	Yes
Vehicle Equipment Reserve	Vehicle/ Equipreplacement, matching funds, project procurement and implimentation	\$184,016	\$ 45,000	\$ 45,000	\$ 45,000	\$ 45,000	\$ 60,000	\$ 240,000	750K+ of LCTOP and CARB grants	Ongoing	No
Estimated Annual Measure D Expenditures		\$4,194,036	\$1,220,293	\$1,073,000	\$1,099,000	\$1,123,000	\$1,152,000	\$5,667,294			

\*Operating costs include driver support (Mechanic, IT Support, Fleet manager, Program Supervisor) salaries and fringes, vechicle 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 (FY22/23-FY26/27)**

Project name:

Location:

Description:

Purpose/Need/Benefits:

Community Bridges - Lift Line Vehicle and Equipment Acquisition	
N/A	
Lift Line Paratransit Vehicles & Equipment	
Fund reserves that can be used for vehicle procurement projects, including fleet vehicles that cannot be funded through 5310, replace aging and or worn shop equipment, improvements and or upgrades to maintenance/operations facility. Provide project matching funds to leverage state funding.	
1) 22/23 LCTOP Vehicle Match for electric shuttle	
2) 21/22-23/24 Ecolane dispatching and scheduling and fleet operations software.	
3) 23/24-26/27 Additional project matching funds for potential vehicle purchases to continue building out electric vehicle fleet and required vehicle related equipment and infrastructure.	

**Schedule (estimated)**

**Total Cost by Phase**

Measure D Funds

Matching Funds

CARB	Equipment	Equipment*	Total
FY21/22	FY21/22-22/23	FY23/24-25/26	
<b>\$ 248,949</b>	<b>\$ 116,563</b>	<b>\$ 571,490</b>	<b>\$ 937,002</b>
\$ 33,510	\$ 30,000	\$ 176,490	\$ 240,000
\$ 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 (FY22/23-FY26/27)**

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

Community Bridges - Lift Line Operations Facility					
545 Ohlone Pkwy, Watsonville, CA 95076					
Lift Line Administrative offices, maintenance facility,fleet parking					
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 and 2021, Measure D funds were used to make \$200K principal payments 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, leaving \$1.5M financed. An additional major project planned for FY 22/23 is continued grading and paving project with an estimated cost of 350K, of which Measure D funding will be utilized for the majority of the project. In future years a solar project will be put into place to provide power for EV charging stations as well as installation of EV infrastructure and electrical grid on the new yard.					
New Facility to include the following but not limited to;					
1) Operational offices					
2) Dispatch & Intake station					
3) Driver holding area (extra board) and lockers.					
4) Breakroom					
5) Maintenance shop					
6) Proper Vehicle Hoists (Large Bus & Mini Vans)					
7) Electric Charging / Fuel Station (time and money)					
8) Wash Station					
9) Shop Ventilation System					
10) Hazardous Waste storage					
11) Solar Bus Ports					
12) EV electrical infrastructure					
13) EV Battery Backup Storage System					

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

Measure D Funds  
Fund - Capital Campaign/  
Donations  
Fund - Commercial  
Loan/Owner Financing

Envir. Review	Design	Acquisition	Renovation	Contingency/ Fees	Total
2019-2021	2019-2021	2019-2020	2019-2026	2020-2026	
\$ 124,297	\$ 202,903	\$ 3,099,532	\$ 3,031,360	\$ 272,250	\$ 6,730,343
\$ 124,297	\$ 202,903	\$ 799,532	\$ 2,888,929		\$ 4,015,662
			\$ 142,431	\$ 272,250	\$ 414,681
		\$ 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	3,031,360
Permits, Inspections and Fees	64,573
Equipment / Furnishings	75,000
Contingency / Utility Fees	106,440

**Total Preliminary Cost 6,730,343**



**MEMORANDUM**

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

**FROM:** Miranda Taylor, Planner

**SUBJECT:** 2022 Coordinated Public Transit-Human Services Transportation Plan Development Process

**MEETING DATE:** May 10, 2022

**RECOMMENDATION:**

Staff will provide an overview of the 2022 Coordinated Public Transit-Human Services Transportation Plan (Coordinated Plan) development process. Committee members are asked to provide feedback on the development of the Draft 2022 Coordinated Plan.

**BACKGROUND:**

AMBAG is required to develop a Coordinated Plan for the tri-county region. Under the Fixing America's Surface Transportation Act (FAST Act) legislation, this plan must be completed and used in developing grant applications for the Federal Transit Administration (FTA) Transportation for Elderly Persons and Persons with Disabilities (Section 5310) grant program. The plan identifies local transportation needs of individuals with disabilities, older adults, and persons with low incomes, and facilitates applications for the Federal Transit Administration (FTA) Section 5310 grant program.

The 5310 program provides formula funding to assist private non-profit groups and transit operators in meeting the transportation needs of the elderly and persons with disabilities when the transportation service provided is unavailable, insufficient, or inappropriate to meeting these needs. The funds are apportioned based on each State's share of population for these groups of people and are awarded to projects through a statewide competitive selection process. Funds may be used for capital or operating expenses. The Coordinated Plan, as required by the 2015 FAST Act, must include the following elements:

- An assessment of available services and current transportation providers (public, private, and non-profit);

- An assessment of transportation needs for seniors and persons with disabilities. This assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts, and gaps in service;
- Strategies, activities, and/or projects to address the identified gaps between current services and needs, as well as opportunities to achieve efficiencies in service delivery; and
- Priorities for implementation based on resources (from multiple program sources), time, and feasibility for implementing specific strategies and/or activities.

## **DISCUSSION:**

The purpose of the Coordinated Plan is to create a plan to improve transit for individuals that are elderly, disabled, and/or low-income. This is accomplished through identifying where the transit system can better meet these individual's needs, and then identifying projects or changes which would help alleviate these shortcomings. The plan also includes a list of transit services that serves the elderly, disabled, and low-income populations.

The projects and changes identified in this plan are made eligible for Federal funding through the Federal Transit Administration (FTA) Transportation for Elderly Persons and Persons with Disabilities (Section 5310) grant program. In the past, this funding source has been used by transit agencies to replace or purchase new paratransit vehicles, as well as for operating expenses.

Below are key dates for developing the 2022 Coordinated Plan:

- **March- May 2022:** Present an overview of the 2022 Coordinated Plan development process to regional Advisory Committees/Councils, Planning Directors Forum, and to the AMBAG Board of Directors
- **April- August 2022:** Develop the Draft Coordinated Plan
- **August- October 2022:** Present the Draft 2022 Coordinated Plan to regional Advisory Committees/Councils, Planning Directors Forum, and to the AMBAG Board of Directors
- **September 15- October 17, 2022:** 30-Day Public Comment Period
- **October 2022:** Prepare the Final 2022 Coordinated Plan
- **November 9, 2022:** AMBAG Board of Directors will be asked to adopt the Final 2022 Coordinated Plan

## **ALTERNATIVES:**

N/A

**FINANCIAL IMPACT:**

Preparation of the 2022 Coordinated Plan is included in the AMBAG FY 21-22 and FY 22-23 Overall Work Program and Budget.

**COORDINATION:**

All MTP/SCS planning activities are coordinated with Caltrans, San Benito County Local Transportation Authority, Monterey – Salinas Transit, Santa Cruz METRO, Santa Cruz County Regional Transportation Commission, San Benito County Council of Governments, and the Transportation Agency for Monterey County, as well as the Planning Directors Forum which includes the local jurisdictions.

**ATTACHMENT:**

1. 2022 Coordinated Plan Update Timeline

## **Attachment 1**

### **2022 Coordinated Public Transit-Human Services Transportation Plan Schedule**

**January 2022** – Prepare update schedule and meet with RTPA reps to go over timelines

**February 2022**- Prepare draft outline/staff report for TAC and Board mtgs. Reach out to agency staff for staff report submission deadlines.

**March/ April 2022**– Present 2022 CPTP development, including schedule and key tasks to Technical Advisory Committees & AMBAG Planning Directors Forum (information item)

- March 17, 2022 – SCCRTC ITAC
- April 7, 2022 – TAMC TAC
- April 7, 2022 – SBtCOG TAC
- April 25, 2022 –AMBAG PDF

**March- May 2022** – Present 2022 CPTP development, including schedule and key tasks to Local Committees- SSTAC & Mobility Advisory Committees (information item)

- March 25, 2022 – SBtCOG SSTAC
- March 30, 2022—MST MAC
- May 10, 2022 – SCCRTC E&D TAC

**April – August 2022** – Prepare Draft 2022 CPTP (including updating any tables/figures)

**April 2022** – Prepare staff report for AMBAG’s May Board of Director’s Meeting

**May 2022** – 2022 CPTP agenda item, including purpose, schedule, expectations to AMBAG Board of Directors (consent item) (might be a planning/presentation depending on the agenda)

- May 11, 2022 – AMBAG Board Mtg

**May/June 2022** – RTPAs take Unmet Transit Needs Assessments to their Boards for finalization

- May 2022 – TAMC Board Mtg
- May 2022 – SCCRTC Board Mtg
- June 2022 – SBtCOG Board Mtg



**August 2022**– Present Draft CPTP Plan to AMBAG Planning Directors Forum  
(Overview of Draft plan and notice of upcoming public comment period)

- August 29, 2022 – AMBAG PDF

**September 2022** – Present Draft 2022 CPTP Plan and ask Board to release for a 30-day public comment period (Planning report item)

- September 14, 2022 – AMBAG Board Mtg

**September 2022** – Present Draft 2022 CPTP to Committees (overview of Draft plan and notice of upcoming public comment period)

- September 15, 2022 – SCCRTC ITAC
- September 23, 2022 –SBtCOG SSTAC
- September 28, 2022 –MST MAC
- October 6, 2022 – TAMC TAC
- October 6, 2022 – SBtCOG TAC
- October 11, 2022—SCCRTC E&D TAC

**September 15- October 17, 2022** – 30 day public comment period

**October 2022** – Prepare Final 2022 CPTP, incorporating comments received and other changes

**November 2022** – Present Final 2022 CPTP to AMBAG Board for Approval

- November 9, 2022 – AMBAG Board Mtg

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

**FROM:** Amanda Marino, Transportation Planner

**RE:** The Draft County of Santa Cruz General Plan Sustainability Update

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## **RECOMMENDATIONS**

Staff recommends that the Elderly and Disabled Transportation Advisory Committee provide input on the Draft County of Santa Cruz General Plan Sustainability Update.

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## **BACKGROUND**

The Santa Cruz County's current General Plan/Local Coastal Program was adopted in 1994, and must be updated at this time to align with new state laws, new regional and local plans, and a community vision that is focused on sustainable growth. At the same time, the County Code needs to be updated to implement the changes that are proposed in the General Plan/Local Coastal Program(LCP). The County is also taking this opportunity to modernize the County Code and prepare Community Design Guidelines that will help applicants to understand development rules and design projects that align with the community's vision.

## **DISCUSSION**

The Sustainability Policy and Regulatory Update (Sustainability Update) is a comprehensive update to the County's General Plan/Local Coastal Program and modernization of the County Code. The goal of this update is to implement new policies and code regulations that support more sustainable communities in Santa Cruz County.

Updates to the General plan include topics regarding housing, transportation, agriculture & resource conservation, sustainable communities, code modernization, commercial development, community services, and environmental justice. Policies and strategies that address pedestrian safety & accessibility in the Sustainability Update can be found in Attachment 2 include updates to the access + mobility element and built

environment element. The full draft documents can be reviewed by visiting:  
<https://sustainability-update-sccgis.opendata.arcgis.com/pages/documents>

## **SUMMARY**

The County of Santa Cruz is seeking input from the E&D TAC on the Sustainability Policy and Regulatory Update that is comprehensive update to the County's General Plan/Local Coastal Program and modernization of the County Code.

## **Attachments**

1. General Plan Sustainability Update Fact Sheet
2. Policies and Strategies That Address Safety & Accessibility



# Sustainability Update

The Sustainability Policy and Regulatory Update is a comprehensive update to Santa Cruz County land use and transportation policies and regulations to plan for development that can accommodate projected population and job growth while maintaining and improving the environment, economy, and quality of life for those who live and work here. The project also modernizes the County Code and updates policies and regulations to meet new state laws.

## What's Included?

This project includes four components:

- Amendments to General Plan/Local Coastal Program Chapters 1, 2, 3, 5, 7
- Amendments to County Code Titles 5, 12, 13, 15, 18
- New County Design Guidelines
- Map amendments (changes to land use designations and zoning) on certain parcels

Key topic areas covered by the project include sustainable communities, housing, transportation, agriculture and resource conservation, code modernization, commercial development, community services and environmental justice.



## Project Highlights

- ❖ Focused growth along key corridors and activity centers in urban areas
- ❖ Continued protection of natural resources
- ❖ Layered transportation network
- ❖ Attainable housing policies and regulations
- ❖ New Residential Flex and Workplace Flex zone districts
- ❖ Modernized use and development permit structure
- ❖ Modernized land uses allowed on agricultural properties with preservation of agricultural land
- ❖ Spotlight on equity and environmental justice

**i LEARN MORE**

*Visit the Sustainability Update website to learn more about the project and review draft documents: [www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate).*

**Santa Cruz County Planning Department**

[www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate)  
[SustainabilityUpdate@santacruzcounty.us](mailto:SustainabilityUpdate@santacruzcounty.us)



As envisioned in the Sustainability Update, sustainable communities include attractive, healthy and walkable neighborhoods with housing available to all income levels; a vibrant economy; and transportation choices that enhance the quality of life and reduce greenhouse gas emissions. Development is focused within urban areas to protect the environment and open space. The Built Environment Element, County Code, and Santa Cruz County Design Guidelines apply sustainable design principles to all scales of development, from individual buildings and sites to the regional scale.

## Green Buildings + Sustainable Sites

For individual buildings and sites, design policies, guidelines and regulations support “green building” features such as solar energy systems, rainwater harvesting, and recycled and non-toxic building materials to conserve energy, water, and other natural resources and support a healthy indoor and outdoor environment. Sites are designed to preserve trees and natural site features, minimize off-site stormwater runoff, and incorporate native plants in landscapes to support local wildlife. These policies are aligned with the County’s *Climate Action Strategy*.



Bioswale and street trees. Photo: MIG, Inc.



Outdoor seating on lower 41st Ave. Photo: MIG, Inc.

## Complete Neighborhoods

At the neighborhood scale, the “15-minute neighborhood” framework encourages integrated commercial and community land uses within neighborhoods to give residents the choice of walking or bicycling to destinations like grocery stores, schools, workplaces, parks, gyms, and libraries. Land use planning for health and wellness is especially critical given recent trends of increased obesity and decreased access to healthy food. New planning tools, including more flexible development standards, support compact housing choices that foster walkable neighborhoods and

community connections. Accessible, pedestrian-oriented development along multimodal corridors and main streets provide active ground floor uses and public gathering places. Neighborhood character is enhanced with development that integrates street trees and landscapes, public art, and connections to local history.

## Community Growth Framework

At the community scale, the County continues to focus growth in urbanized areas within the Urban and Rural Services Lines. Accommodating development within these lines preserves agricultural land and open space to sustain the County's agriculture, timber, and tourism economic bases, conserve natural resources, and restrict growth in areas with high disaster risk and/or limited infrastructure. Higher-intensity residential and commercial development is planned around multimodal corridors, high-quality transit stops, and centers of community activity. Population and job growth are coordinated with development of transportation infrastructure.

## Regional Coordination

At the regional scale, the County is coordinating long-range planning and review of major development projects with cities, neighboring counties, and regional and state agencies. Recognizing the interrelationship between land use and transportation, the County is working with the Santa Cruz County Regional Transportation Commission and adjoining communities on transportation projects that increase transportation options and support healthy communities, including the 32-mile Monterey Bay Sanctuary Scenic Trail. Additionally, coordination with special districts ensures that sufficient utility infrastructure and public facilities are available for areas where the County plans to accommodate growth.

## Highlights

- ❖ New Santa Cruz County Design Guidelines provide design guidance to ensure neighborhood compatibility, and encourage public gathering places, quality open space, and the inclusion of sustainable design features such as rainwater cisterns and solar energy systems
- ❖ New "Residential Flex" zone district supporting compact residential development along key corridors along with updated guidance to facilitate mixed-use projects and support "15-minute neighborhoods"
- ❖ Regulations protecting natural resources are maintained, honoring our community's strong connection to nature and treasured access to outdoor recreation and open space
- ❖ New requirement in Chapter 13.11 to include trees in all residential developments
- ❖ Layered network approach to roadways supports alternative modes of transportation



LEARN MORE

*Visit the Sustainability Update website to learn more about this project and review draft documents at [www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate). The following documents will address sustainability:*

*Draft General Plan:*

- Chapter 2, Built Environment Element, Goal 1: Home Occupations
- Chapter 2, Built Environment Element, Goal 4: Community Character + Design

*Draft County Code:*

- Design Standards and Guidelines (13.11.070–13.11.076)

*Draft Santa Cruz County Design Guidelines:*

- Residential Design Guidelines
- Commercial and Mixed-Use Design Guidelines



## Housing Diversity to Meet Community Needs

The County's housing needs are changing as a result of several interconnected trends: seniors are making up a larger percentage of the population as the Baby Boomer generation ages; more professionals are choosing to move to Santa Cruz and commute over the hill to Silicon Valley or work remotely; and the region has not built enough housing to accommodate demand, leading to a housing supply crisis. Production of low- and moderate-income housing options has particularly lagged. As housing costs continue to rise, many residents are at risk of being priced-out of living in Santa Cruz County.

Detached single-family homes comprise two-thirds of the County's existing housing units. Unfortunately, the large housing unit size and expensive price tag often makes single-family housing poorly suited to meet the needs of singles, students, young families, seniors, and others seeking smaller, low or moderate-income housing options.

The Sustainability Update includes land use policies and code updates to encourage development of housing that is attainable to a wide range of residents. Greater housing diversity in Santa Cruz County offers an opportunity to support a more diverse community, which in turn will not only help seniors age in place but will help employers attract and retain workers as more people can afford to both live and work within the County.



Top photo: <https://www.flickr.com/>

Middle photo: <https://www.pikrepo.com/>

Bottom photo: <https://pansykemprealty.com/>

Accessed June 12, 2020.

## Context-Appropriate Housing Development

The County is planning for housing development in locations and at densities that are appropriate for our community. Existing and proposed residential land use designations and zone districts ensure that density is appropriate for the level of infrastructure and services available. In rural areas, lower density development will be maintained based on resource and infrastructure constraints. Within the County's urban and rural services lines, the Sustainability Update includes zone districts with densities ranging from 1 to 45 units per acre, with an additional density bonus available to projects that incorporate affordable housing units. The highest density is proposed for a new "Residential Flex" zone district, which is intended for compact housing near transit stops, multimodal corridors, and centers for employment, education, shopping, and services. All development will be subject to standards such as building setbacks from property lines, building height, floor area, open space, and parking.

# Infill Housing Options and the “Missing Middle”

The Sustainability Update promotes housing types such as accessory dwelling units (ADUs), small lot single family homes, dwelling groups, duplex/triplex/quadplexes, townhomes, and small apartment buildings, all of which can work well as “infill” development (new development within existing developed neighborhoods). These housing types are referred to as the “missing middle” because they have densities between those of single-family homes and apartment buildings. Infill development in single family neighborhoods adds population density to support a wider range of neighborhood businesses. Design guidelines will ensure that infill development is proportional in scale and size to the surrounding neighborhood.



ADU over a garage provides infill development in an existing neighborhood. Photo: <https://accessorydwelling.org/what-adus-are-and-why-people-build-them/>. Accessed June 12,

## Highlights

- ❖ Addition of new General Plan policies to encourage attainable housing for residents of all income levels
- ❖ New “Residential Flex” zone district for compact housing near key corridors and activity centers
- ❖ Revised development standards for existing residential zones to encourage infill development.
- ❖ New development standards for mixed use residential/commercial development
- ❖ Updates to allowed uses and permit requirements in residential zones to align with modern land uses, state laws, and new permit framework.
- ❖ Simplified calculations for floor-area ratio (FAR). FAR is the ratio of building floor area to lot area.
- ❖ New design guidelines focusing on creation of high-quality housing within the context of transportation corridors and existing neighborhoods.



LEARN MORE

Visit the Sustainability Update website to learn more about this project and review draft documents at [www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate). The following documents will address housing development:

### Draft General Plan:

- Chapter 2, Built Environment Element Goal 2: Residential Land Use
- Chapter 2, Built Environment Element Goal 4: Community Character + Design

### Draft County Code:

- Residential Districts (13.10.331 et seq)
- Accessory, temporary, secondary uses (13.10.611 et seq)
- Residential Special Use Regulations (13.10.681 et seq)
- Design Standards and Guidelines (13.11)
- Parking and Circulation (13.16)

Draft Santa Cruz County Design Guidelines: Chapter 3: Multifamily Residential, Chapter 5: Mixed-Use



The Sustainability Update includes commercial and industrial land use policies recognizing the evolving workplace, shopping, and service needs of residents, businesses, and visitors. These policies are closely aligned with the County's [Economic Vitality Strategy](#).

## Jobs/Housing Balance

According to the U.S. Census, twice as many workers commute out of the County as commute in, and commute times are increasing. Higher-income residents tend to work over the hill, and there are few job opportunities within the County for these residents. On the flip side, workers in existing lower-wage jobs in Santa Cruz County are finding it more and more difficult to afford to live here. To improve the jobs/housing balance, the County is planning to accommodate strategic job growth in industries such as health care and technology, while simultaneously enabling more housing options for workers in existing industries such as agriculture and tourism.



Soquel Village. Photo: <https://localwiki.org/santacruz/Soquel>

Accessed June 12, 2020.

## Location, Location, Location

The Sustainability Update recognizes that retail, restaurants, and other consumer commercial land uses are appropriate in towns and villages, along commercial corridors and in centers of community activity. Modern office growth is encouraged along the Soquel Drive corridor, coordinated with high-quality transit, pedestrian and bike amenities, and complimentary land uses. Design guidelines will provide for attractive and engaging commercial streetscapes. The Sustainability Update plans for large service commercial and industrial land uses to be located away from activity centers, along truck routes.

## Mixed-Use Development + Flexible Workplaces

Traditional zoning separates land uses such as residential, office, shopping, manufacturing, and does not allow for more than one land use per property. Separation of land uses is sometimes necessary for health and safety. However, mixed land uses can provide many benefits, such as efficient design, active streetscapes, economic viability, and housing diversity. There is an opportunity to redevelop and rebrand shopping centers as mixed residential and commercial community activity centers, especially since future retail growth is limited by the rise of e-commerce. Also, the proposed “Workplace Flex” Zone District will bridge the gap between traditional office and light industrial land use, and is characterized by dynamic employment centers with a mixture of office, commercial, manufacturing, and research uses, as well as ancillary retail and services. In addition, medical mixed-use policies will provide for modern medical buildings with complimentary land uses.



*Multi-use Santa Cruz Sash Mill. Photo: Santa Cruz County staff.*

Small businesses are encouraged to grow in incubators, coworking spaces, and satellite offices. Broadband development is planned to accommodate traditional office growth as well as telecommuting. Home-based businesses that are compatible with residential neighborhoods serve to provide economic stability for property owners while adding to neighborhood land use diversity.

## Tourism + Visitor Accommodation

New hotels, motels, and other lodging types are needed to match visitor demand and are encouraged to locate in centers of commercial activity to generate “multiplier effect” benefits as overnight visitors patronize local businesses. Temporary events and new permanent amenities can serve to highlight Santa Cruz County as a year-round tourist destination.

## Highlights

- ❖ Removal of parcel-specific commercial policies from the General Plan, and addition of new policies to encourage activity centers for employment, medical services, community gathering, and shopping and entertainment.
- ❖ New “Workplace Flex” Zone District that accommodates a variety of office, service commercial and light industrial land uses, as well as complementary consumer commercial land uses.
- ❖ Updates to allowed uses, development standards, and permit requirements in commercial and industrial zones to align with modern land uses, state laws, and a new permit framework.
- ❖ Introduction of maximum floor area ratios (FAR) for commercial, visitor, office and industrial land use designations. FAR is the ratio of building floor area to lot area.
- ❖ New design guidelines focusing on integrated land use and transportation planning along key corridors.



LEARN MORE

*Visit the Sustainability Update website to learn more about this project and review draft documents at [www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate). The following documents will address commercial development:*

### *Draft General Plan*

- *Chapter 2, Built Environment Element (Objective BE-1.3: Activity Centers, Goal 3: Commercial + Industrial Land Use, Goal 4: Community Character + Design)*

### *Draft County Code:*

- *Zone Districts (Commercial Districts: 13.10.331 et seq; Industrial Districts: 13.10.341 et seq)*
- *Special Uses (Commercial: 13.10.651 et seq; Visitor Accommodations: 13.10.689 et seq)*
- *Site Development and Design Review (13.11)*
- *Parking and Circulation (13.16)*

### *Draft Santa Cruz County Design Guidelines*

- *Chapter 4: Commercial, Chapter 5: Mixed-Use, Chapter 6: Workplace Flex*

# A New Approach to Transportation Network Planning

Transportation planning has shifted substantially over the last decade. State legislation and regional policy changes recognize the need to achieve a more balanced, multi-modal transportation system that allows people with varying physical abilities, ages and economic circumstances to access goods and services via transportation modes other than single-occupant vehicle travel.



Source: Sustainable Santa Cruz County Plan

The Sustainability Update provides a framework for providing a system that recognizes all users by identifying a network of pedestrian and bicycle facilities where people are prioritized at a human scale as well as recognizing the need to maintain streets that move vehicles and transit. This approach provides for all modes but prioritized on specific streets to comprise a “layered network.” In an area where right-of-way is constrained and there are not many opportunities for new facilities, attempting to get the best facilities for all modes on all roadways is practically infeasible. This approach allows for improved facilities for each user type within a network. As an example, a Main Street type would have much larger sidewalks than a Multimodal Corridor.

## Layered Network and Street Types

A balanced transportation system is based on the understanding that it is difficult for a single roadway to meet the demands and expectations of all modes simultaneously. A “layered” transportation network envisions streets as systems based on user types.

In this approach, certain user types are prioritized on specific streets. When compiled together the roadway system is then comprised of multiple networks of street types such that different users are traveling using different networks. This layering approach allows for each user type to have a higher quality experience than an approach that results in compromising space for all users by attempting to accommodate everyone within limited space.

## The Land Use -Transportation Nexus

Santa Cruz County experiences severe congestion, particularly in the north-south direction, with long peak periods of travel and high amounts of delay. The direction of commute traffic and level of congestion reflects the jobs-housing imbalance that exists in the County, with jobs focused in cities and affordable housing focused farther south. Our incomplete transportation network also contributes to congestion by

reducing the options for mobility and access to key destinations throughout the County. Transportation issues are inextricably linked to land use as well as historic patterns of insufficient investment in transportation infrastructure. The Sustainability Update reflects this re-orientation toward the land use-transportation connection by tying development character and land use form to the street type.

## Technology will Transform Infrastructure

New technology such as automated vehicles and vehicle-to-infrastructure communications become more commonplace, transportation networks will change permanently in ways that are hard to envision in 2022. However, planners can anticipate that parking needs will change and become more centralized, curb space will be in higher demand, and that our current transportation system will go through a major disruption as we know it. Therefore, the Sustainability Update includes objectives and policies geared towards taking a proactive and adaptable approach to planning for intelligent transportation solutions and new technology.



Source: <https://ops.fhwa.dot.gov/publications/fhwahop17001/ch1.htm>

## Highlights

- ❖ Layered network approach to roadways tied to land use planning
- ❖ Incorporation of community character and streetscape
- ❖ Updated and comprehensive policies on coastal access
- ❖ Inclusion of policies for safety of all modes
- ❖ Recognition of technological innovations including data infrastructure

### LEARN MORE

*Visit the Sustainability Update website to learn more about this project and review draft documents at [www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate). The following documents will address transportation:*

*Draft General Plan:*

- *Chapter 2, Built Environment Element, Goal 1: Sustainable Development Framework*
- *Chapter 3, Access and Mobility Element*

*Draft County Code:*

- *Access, Circulation, and Parking (13.16)*

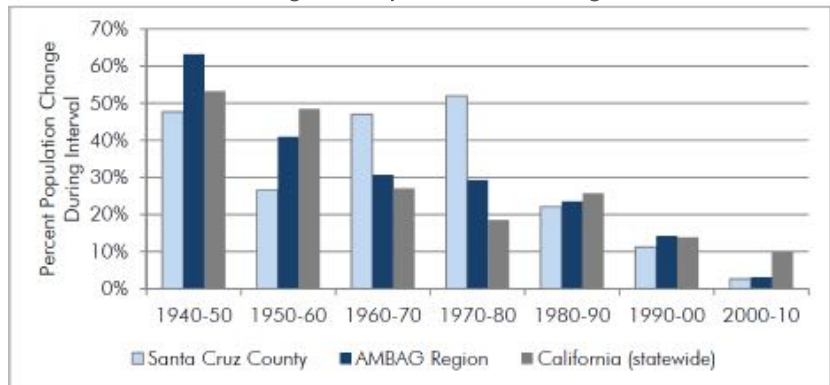
*Draft Santa Cruz County Design Guides: Residential and Mixed-Use Design Guidelines*



Community services are critical to both high-quality neighborhoods and commercial vitality. Services such as water, sewer, telecommunications, fire, and police must be adequate to serve both existing people and businesses, but also new growth. The County's estimated 2020 population according to the California Department of Finance (DOF) was 271,233 with about half of those people residing in the unincorporated area. According to the Association of Monterey Bay Area Governments, the unincorporated County is projected to grow five percent by 2040. The County will continue to focus growth within the Urban and Rural Services Lines in order to ensure the adequate provision of services to communities and to preserve agricultural land and open space.

The Sustainability Update addresses the provision of community facilities and infrastructure to support existing and future populations in a manner that supports existing sustainable growth patterns. Major revisions to community services are detailed below.

Housing and Population in the Region



Source: California Department of Finance

## Highlights

- ❖ Updates to be consistent with the recently completed Parks Strategic Plan
- ❖ New policies to address the Sustainable Groundwater Management Act requirements
- ❖ Updates to telecommunications to address requirements related to broadband access and new technologies.
- ❖ Water Supply and Conservation
- ❖ Updates to ensure consistency with new Environmental Justice law



LEARN MORE

Visit the Sustainability Update website to learn more about this project and review draft documents at [www.sccoplaning.com/SustainabilityUpdate](http://www.sccoplaning.com/SustainabilityUpdate). The following documents will address community services:

#### Draft General Plan:

- Chapter 1, Introduction
- Chapter 7, Parks, Recreation, and Public Facilities

#### Draft County Code:

- Parks, Recreation and Open Space Districts: Sections (13.10.351 - 13.10.355)
- Public and Community Facilities District: Sections (13.10.362)

Transportation infrastructure is addressed in the Access + Mobility Element and green infrastructure and light impact design is addressed in the Built Environment Element.

There are seven overarching environmental justice themes: pollution exposure and air quality, public facilities, food access, safe and sanitary homes, physical activity, “civil” or community engagement, and improvements and programs that address the needs of disadvantaged communities. Environmental justice is woven throughout the Sustainability Update by identifying policies and programs that support and prioritize services to disadvantaged populations.



Source: Sustainable Santa Cruz County Plan

The Sustainability Update also includes mapping of disadvantaged communities, which are defined as population groups that are disproportionately affected by environmental pollution or hazards, have high concentrations of low income, high rates of unemployment, low levels of homeownership, high rent burden, sensitive populations, or low levels of educational attainment (Health and Safety Code [HSC] section 39711). In order to account for the changing characteristics of the community as well as the variety of state-mandated definitions, the County identifies disadvantaged communities as those that are defined as such by HSC section 39711, and by state agencies such as the California Air Resources Board, the California Environmental Protection Agency, and the State Water Resources Agency, or U.S. Census tracts where the majority of the population are low income, poverty, or minority as defined by U.S. Census data or local income surveys.

## Highlights

- ❖ New policies related to food access and community engagement
- ❖ New policies related to access to open space and public infrastructure
- ❖ Identification of policies that support environmental justice throughout the General Plan
- ❖ Mapping of disadvantaged communities

### LEARN MORE

*Visit the Sustainability Update website to learn more about this project and review draft documents at [www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate). The following documents will address environmental justice:*

*Draft General Plan:*

- Chapter 2, Built Environment Element
- Chapter 3, Access + Mobility
- Chapter 5, Agriculture, Natural Resources, + Conservation
- Chapter 7, Parks, Recreation, and Public Facilities

*Environmental Justice goals, objectives, policies and implementation measures in each chapter of the General Plan are noted by the initials “EJ.”*

# Conservation Shapes Our Community

Santa Cruz County is graced with unparalleled scenic beauty, with oak and redwood forests, grasslands and coastal scrub, networks of creeks and streams, and stunning coastlines, all providing outdoor recreation opportunities for County residents and important habitat for rare plant and animal species. Prime and productive agricultural land concentrated along the north coast and in south county supports a thriving agricultural industry and contributes to the open space and bucolic landscapes in rural areas.



Photo: <https://unsplash.com/>

In 1978, forward-thinking citizens of Santa Cruz County passed the Measure J voter initiative, which established the Urban and Rural Services Lines to protect these important resources. For over 40 years, County land use policies have directed development to urbanized areas where services are available, and limited land divisions and development density and regulated land uses allowed outside these areas. Policies consistent with Measure J provided in the Agriculture, Natural Resources + Conservation Element continue to preserve open space to maintain the scenic rural character outside urban areas; protect public safety, cultural resources, and natural habitats, including riparian corridors; preserve agricultural land for agricultural use; and provide for the long-term sustainable management of water, timber, and mineral resources.

## Supporting Agriculture

Since the last major update of the General Plan in 1994, the local agricultural economy has evolved in several significant ways. One trend has been the centralization and consolidation of farming operations. Farmers often lease multiple parcels, and require centralized locations for storage of agricultural equipment and other infrastructure. At the other end of the economic scale, smaller local farms may



Photo: <https://unsplash.com/>

depend on ancillary agri-tourism activities such as farm dinners and community education to ensure that farming remains commercially viable. Local wineries may also rely on on-site events to remain profitable.



Photo: Santa Cruz County

While updating policies and regulations to support modern farming practices, County regulations continue to preserve agricultural land as an essential and irreplaceable resource for future generations by maintaining policies limiting land divisions and conversions of agricultural land and requiring buffers on land adjacent to commercial agricultural parcels. The Sustainability Update also provides new guidance for siting development to protect agricultural land and minimize disturbance to agricultural soils and local agricultural operations.

## Highlights

- ❖ Continue to protect cultural resources; protect and restore natural resources including sensitive habitats and scenic areas; provide for the long-term sustainable management and conservation of water, timber, and mineral resources; and preserve open space in rural and urban areas.
- ❖ Allow a broader range of agricultural support uses on agricultural land such as agricultural research and development facilities and agricultural services, while requiring discretionary review and ensuring such uses on commercial agricultural land support the primary agricultural use.
- ❖ Support local wineries and breweries by allowing expanded on-site marketing events, with standards to protect agricultural land and minimize impacts to adjacent properties.
- ❖ Allow consolidated storage of farm equipment to support farming operations on multiple parcels. This supports farms located on multiple leased properties that are not necessarily adjacent.
- ❖ Facilitate agritourism events such as farm stays and dinners, and on-farm education and sales. The additional income provided by agritourism can be essential to the success of smaller local farms.

### LEARN MORE

Visit the Sustainability Update website to learn more about this project and review draft documents at [www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate). The following documents will address agriculture and resource conservation:

*Draft General Plan:*

- Chapter 5, Agriculture, Natural Resources + Conservation

*Draft County Code:*

- Environmental and Resource Protection (Title 16)
- Agricultural Districts (13.10.312- 13.10.315)
- Agricultural Uses (13.10.631-13.10.639)



The intent of Code Modernization is to update land use regulations in the Santa Cruz County Code to function more effectively. Clarifying permit and other code requirements will provide a better experience for applicants and reduce uncertainty in the application process. From the community perspective, updating land use regulations and uses allowed within zone districts will support community investment and reduce unpermitted construction. While modernizing land use regulations, the Sustainability Update continues to maintain regulations protecting the environment and neighborhood quality.

## Community Context

The Santa Cruz County Code was adopted in the 1950s and has been amended frequently. Land use regulations addressing zoning, housing, and permit requirements have become increasingly complex. After a series of community forums, in 2014 and 2015 Planning Staff presented a proposal to the Board of Supervisors to modernize land use regulations in the County Code, focusing on community priorities: Clarify permit requirements and reduce processing time and uncertainty, modernize agricultural regulations, update uses allowed in zone districts, and address home-based businesses. Code Modernization is now part of the Sustainability update to allow for additional community input and comprehensive environmental review.



*Photo: Santa Cruz County staff*



*Photo: Santa Cruz County staff*

## What is Code Modernization?

Code Modernization includes the following key updates to land use regulations in Chapter 13.10 (Zoning Regulations) of the County Code:

- Update regulations for agricultural uses to support local commercial agriculture, breweries, and wineries, while preserving agricultural land (see the “Agriculture and Resource Conservation” fact sheet.)
- Modernize the list of uses allowed in zone districts, such as allowing research and development in commercial districts, and provide permit reviews appropriate for each use.
- Clarify regulations for home-based business in residential areas, including home occupations, and weddings and community events.

- Update development standards for the Multi-family (RM) zone district and permit requirements for residential accessory structures (also see the “Housing” Fact Sheet.)

Permit requirements for land use projects provided in Chapter 18.10, Permit and Approval Procedures, are also updated to be clearer and to provide appropriate permit reviews:

- Introduce “Use Permits” for new uses, such as establishing a new restaurant in an existing building, and “Site Development Permits” for physical site development, such as the construction of a new building. This replaces the current “review levels” approach and will allow the review process to match the project scope more closely.
- Standard terms describing the permit review processes will replace the current “review levels.” For example, a “Conditional Use Permit” describes a use permit requiring public notice and a public hearing and would replace the current “Level 5 approval” term.
- Clarify which permits are subject to environmental review (“discretionary” vs. “ministerial”).

## Highlights

- ❖ Change permit Level I – VII framework to “use permit” and “development permit” framework
- ❖ Remove local solar access requirements (Chapter 12.28, Solar Access Protection) to ensure consistency with state law.
- ❖ Move information regarding appeal of Coastal Permits from Zoning Regulations (Chapter 13.10) to Chapter 13.20 (Coastal Zone Regulations)
- ❖ Consolidate procedural requirements, including requirements for amending the Zoning Ordinance and Zoning Map, General Plan, and Local Coastal Program, in Title 18, Procedures.
- ❖ Update requirements for Planned Unit Developments and provide as new Chapter in Title 18.
- ❖ Consolidate parking requirements in new County Code Chapter 13.16



LEARN MORE

*Visit the Sustainability Update website to learn more about this project and review draft documents at [www.sccoplanning.com/SustainabilityUpdate](http://www.sccoplanning.com/SustainabilityUpdate). The following documents will address code modernization:*

*Draft County Code:*

- *Building Regulations (Title 12)*
- *Zoning Regulations (Title 13, Chapter 13.10)*
- *Site, Architectural and Landscape Design Review (Title 13, Chapter 13.11)*
- *Environmental and Resource Protection (Title 16)*
- *Procedures (Title 18)*

## **County of Santa Cruz Sustainability Update Policies and Strategies that Address Safety & Accessibility**

The following policies either directly or indirectly address the goals and objectives of achieving a safer and more accessible transportation network and land use environment. There may be additional policies not captured here that support this goal. The objectives, policies and implementation strategies that are included below are organized by the General Plan Element in which they appear and the order in which they appear within that Element. In order to save space explanatory bubbles and photos have been removed. See the project website for all the photos, captions, and additional explanations of terms and information.

### **ACCESS + MOBILITY ELEMENT**

#### **OBJECTIVES RELATING TO SAFETY & ACCESSIBILITY**

##### **Objective AM-2.2 Safety**

To recognize that traffic injuries and fatalities are preventable and take a multi-disciplinary, systems-based approach to reduce injuries and prevent fatalities.

##### **Policies**

AM-2.2.1 (EJ) Vision Zero. Address system design, vehicle technology, and enforcement to reduce traffic related injuries and fatalities.

AM-2.2.2 (EJ) Safe Routes to School. Address existing safety issues around youth transport, encourage growth of active transportation to schools in order to reduce vehicle trips, and support increased funding for school bus transit.

AM-2.2.3 (EJ) Infrastructure Safety. Plan for and program infrastructure that promotes a safe means of travel for all users along the right-of-way, such as sidewalks, shared use paths, bicycle lanes, and paved shoulders.

AM-2.2.4 Maintenance Safety. Require that contractors and utility companies doing roadside work maintain the road edge in the best possible condition during construction and, upon project completion, improve the road shoulder to the pre-construction condition or better in order to minimize safety issues due to damaged roadways and sidewalks to bicyclists and pedestrians.

##### **Implementation Strategies**

AM-2.2a Create an Action Plan with an inter-disciplinary approach to safety with the goal of reducing serious injuries and eliminating fatalities due to traffic collisions. (Responsibility: Planning Department, Public Works, Health Services Agency, Sheriff's Department, County Administrator Office, Board of Supervisors)

AM-2.2b Seek funding to implement the County Safe Routes to School Plan. (Responsibility: Planning Department, Public Works)

AM-2.2c Continue to support the Community Traffic Safety Coalition (CTSC) work by seeking funding from SCCRTC. (Responsibility: Health Services Agency)

AM-2.2d Design streets to meet target speeds based on street type rather than faster auto speeds. Streets that are prioritized for pedestrians or bicyclists should have lower speeds.

AM-2.2e Design new intersections, roadways and developments to reduce the number of conflict points between vehicles, pedestrians, and bicyclists. Options considered should include but not be limited to protected (Dutch) intersections, roundabouts, reducing the number of driveways to development, protected bike lanes, and separated paths. (Responsibility: Planning Department, Public Works)

AM-2.2f (LCP) Post and stripe roadways, particularly coastal roads, in a manner designed to discourage parked cars from creating hazards for moving bicyclists. (Responsibility: Public Works)

AM-2.2g Require any future development adjacent to or near the railroad right-of-way to be planned with the safety of the rail corridor in mind. This includes considering pedestrian circulation and compliance with the ADA. Measures to improve safety include improvements to existing at-grade crossings as well as fencing, signage, or other appropriate measures to limit trespassing onto the active rail tracks. (Responsibility: Planning Department, Public Works)

#### Objective AM-2.3 People of All Ages + Abilities

To provide streets and transit services that improve access and mobility for people of all ages with varying mobility abilities and needs.

#### **Policies**

AM-2.3.1 People with Disabilities. Plan for the needs of people with disabilities in the design of transportation facilities. Ensure that sidewalks, crosswalks, public transportation stops and facilities, and other aspects of the transportation right-of-way are ADA compliant and meet the needs of people with different types of disabilities, including mobility impairments, vision impairments, hearing impairments, and others.

AM-2.3.2 (EJ) Facility Design. Regularly review sidewalk and bicycle facility standards in the County Roadway Design Criteria to incorporate best practices for encouraging active transportation use.

AM-2.3.3 Para-transit Service. Support expansion of shuttle, bus, van and taxi service for those who cannot use regular fixed-route buses and reduction or elimination of reservation notices.

AM-2.3.4 Bus Enhancements. Support Metro's efforts to upgrade buses to include wheelchair accommodations (lifts) and consider improving transit facilities on high frequency transit routes to incorporate level boarding.

### **Implementation Strategies**

AM-2.3a Ensure that new development is ADA compliant and improve roadways to ADA standards. Prohibit landscaping that reduces the width of sidewalk (such as tree wells) and all other obstacles (such as telephone poles and fire hydrants) that would prevent pedestrian movement. (Responsibility: Planning Department, Public Works)

AM-1.3b (EJ) Retrofit existing intersections and sidewalks to be compatible with ADA standards and remove existing barriers to movement. (Responsibility: Public Works)

AM-2.3c Update the Santa Cruz County Code (SCCC) to update sidewalk standards and to include protected and buffered bicycle lane standards. (Responsibility: Planning Department, Public Works)

AM-2.3d (EJ) Paths and pedestrian facilities, both on and off road, should include user amenities such as shade trees, benches, and lighting. (Responsibility: Planning Department, Public Works, Parks Department)

AM-2.3e Consult the SCCRTC Unmet Paratransit and Needs List when approving new development or creating new plans to support the projects and services identified within the list. (Responsibility: Planning Department)

AM-2.3f (EJ) Partner with local school districts and non-profit organizations to improve access to bicycles, helmets, and related equipment for low income families. (Responsibility: Planning Department)

### **OTHER POLICIES & STRATEGIES RELATING TO ACCESSIBILITY**

AM-3.1.3 Transit Facility Design. Request transit stop improvements from developers including shelters, amenities, and improved accessibility to crossings by relocating stops if possible. Coordinate major new development review with Metro Transit District for design and requirements for new transit facilities.

AM-3.2b Work with Metro and developers to include active transportation amenities such as bicycle parking and pedestrian safety features at transit stops. (Responsibility: Planning Department, Public Works, Metro)

AM-4.1.12 (LCP) New Development. Encourage provision of and/or require as a condition of approval improvements at major access points that provide services to the public such as path improvements or maintenance, recycling and garbage collection, vehicle and bicycle parking, beach shuttles, ADA access improvements, restrooms, security, scenic overlooks, or signs.

AM-6.1d Update SCCC to address unauthorized signage and provide standards for signage that is not in the current MUTCD, such as County-specific wayfinding or business signage. (Responsibility: Planning Department)

AM-10.1.3 Bicycle and Pedestrian Safety. Upgrade County intersection technology to improve bicycle and pedestrian safety.

AM-10.1c Implement technology that improves pedestrian safety, such as leading pedestrian intervals at intersections with free right-turning movements and support vehicle technology that detects pedestrian movements. (Responsibility: Public Works)

## **BUILT ENVIRONMENT ELEMENT**

### **Objective BE-1.2 Corridors + Connections**

(EJ) To coordinate land use and transportation planning to plan for population and job growth along key transportation corridors that can accommodate increased building intensity in order to support land use patterns with less traffic congestion and more mobility.

### **Objective BE-1.3 Vibrant Activity Centers**

To encourage centers of concentrated commercial, residential, and community land uses serving living, shopping, service, and office needs that accomplish the “5 Ds” for reduced trip generation: diversity, design, density, destination, and distance to transit.

### **Objective BE-1.4 Complete Neighborhoods**

(EJ) To ensure that residents and visitors within the USL and RSL have convenient access to shopping and services within one-half mile (15-minute) walkshed to meet daily needs in order to reduced reliance on car travel and enhance opportunities for neighborhood mobility, social connections, and healthy lifestyles.

## **Policies**

BE-1.4.1 Neighborhood Stores, Services and Gathering Places. Support the thoughtful integration of corner grocery stores, cafes, small personal health businesses such as yoga and fitness studios, and other neighborhood-serving commercial businesses into residential areas to improve local resident access to convenience goods and services and to foster neighborhood gathering opportunities. Discourage national retailers and encourage locally-owned businesses.

BE-1.4.2 Neighborhood Mobility Infrastructure. Encourage sidewalks, bike lanes, and bus routes that support a variety of transportation options within and between neighborhoods, with particular emphasis on routes to schools, parks, grocery stores, and gathering places.

*See also Policy AM-2.2.3: Infrastructure Safety.*

BE-1.4.3 Public Facility Uses in Residential Land Designations. Allow public and quasi-public facility and service uses in residential designations with appropriate buffers and context-appropriate design for residential neighborhoods.

*See also Policy PPF-1.1.1: Public Facility/Institutional Designation.*

BE-1.4.4 (EJ) Physical Recreation Facilities. Support private gyms, studios, and public recreational facilities in neighborhood locations that are convenient and accessible by walking and bicycling.

BE-1.4.5 (EJ) Health Services. Support health services in locations that are convenient and accessible by walking, bicycling and public transit. Cluster major health facility land uses so that those seeking medical care can travel to one area for multiple medical services.

BE-1.4.6 (EJ) Access to Nature. In residential and commercial development areas, consider pedestrian and bicycle infrastructure connecting development to nearby public trails and parks, as well as alternatives to public parks such as parklets, temporary parks, and privately-owned public spaces.

*See also Policies PPF-2.1.10: Private Local Parks and PPF-2.2.3: Mini-Park Sites.*

BE-1.4.7 (EJ) Eliminate Food Deserts. Encourage small markets and grocery stores to locate in “food deserts” where there are not currently healthy food options within a one-half mile radius. If the market cannot support economic viability of a traditional grocery store within a one-half mile walkshed, encourage neighborhood corner stores, scheduled food truck visits, and farmer’s markets selling fresh produce and other healthy foods.

BE-1.4.8 (EJ) Urban Agriculture. Allow ancillary food cultivation as part of park/recreation, residential, public/quasi-public, and commercial developments, where feasible and appropriate. Allow animal keeping with conditions dependent on parcel size and location, as well as type and number of animals. Encourage urban agriculture as an appropriate temporary use on vacant lots.

*Note that cannabis cultivation is subject to locational constraints. See Objective BE-3.6: Cannabis Industry.*

### **Implementation Strategies**

BE-1.4a (EJ) Map one-half mile walksheds from grocery stores, schools, health services, parks, gyms, and other neighborhood gathering places, with particular emphasis on disadvantaged communities. Identify gaps in pedestrian and bicycle infrastructure, neighborhood commercial land uses, healthy food options, and health and fitness opportunities. In areas where “15-minute neighborhoods” do not exist, redesignate/rezone parcels or apply a combining zone district to allow for neighborhood-scale nonresidential land uses, and identify grant opportunities to fund improved pedestrian/bicycle infrastructure and access to nature. (Responsibility: County Administrative Office, Planning and Public Works Departments, Planning Commission, Board of Supervisors)

BE-1.4b Explore zoning and development standards updates that could allow for neighborhood-appropriate accessory commercial uses in residential neighborhoods, that would exceed regular parameters for home occupations but would be compatible with the neighborhood.

*See also Objective BE-2.4: Home Occupations.*

BE-1.4c Identify vacant or underutilized neighborhood commercial spaces and explore regulatory and incentive options to encourage full tenancy. Consider temporary conversion of these spaces to community event spaces, public parks, farmer’s markets, and other similar uses. (Responsibility: Planning Department, County Administrative Office)

BE-1.4d (EJ) Consider providing incentives for development projects that provide community benefits related to access to healthy food options and access to nature. (Responsibility: Planning Department, Planning Commission, Board of Supervisors)

BE-1.4e (EJ) Identify opportunities to convert public right of way into neighborhood parklets, especially in neighborhoods without public parks. (Responsibility: Planning and Public Works Departments)



BE-1.4f (EJ) Support urban agriculture uses, regulate safety and aesthetics of urban agriculture, and allow urban agriculture in appropriate locations. (Responsibility: Planning Department, Agricultural Policy Advisory Committee, Planning Commission, Board of Supervisors)

#### Objective BE-4.3 Public Realm + Placemaking

To enhance the public realm and provide a sense of place by fostering accessible, safe, and human-scale public spaces and increasing physical, social, and cultural connections.

#### **Policies**

BE-4.3.1 Pedestrian-Oriented Development. Along streets where pedestrians are prioritized, orient commercial and mixed-use buildings to face the street. Encourage connected blocks with shorter block lengths or midblock pedestrian connections. Provide wayfinding signage where appropriate. Encourage dynamic, attractive, and engaging streetscapes through design strategies such as varied building heights, setbacks, building styles, architectural features, and materials; ground floor glazing; and outdoor landscaping and gathering spaces.

*See also Policy AM-5.1.3: Support Placemaking.*

BE-4.3.2 Public Gathering and Placemaking. Encourage public gathering spaces both in public and private projects, including spaces such as parklets, pocket parks, plazas, sidewalk seating, and areas for outdoor dining that provide a sense of place. Locate gathering places so they are visible and accessible from public streets and connected to other pedestrian facilities.

BE-4.3.3 (EJ) Deprioritize Vehicles. Wherever possible, locate parking lots behind buildings. Screen parking lots located adjacent to residential parcels with fences, walls, and/or landscaping. On corridors where pedestrians, bicycles and/or transit are prioritized over vehicles, encourage bicycle storage, shared parking structures, and park and ride lots.

BE-4.3.4 (EJ) Accessible Streetscape. Along streets where pedestrians are prioritized, ensure that all Americans with Disabilities Act (ADA) requirements are met or exceeded and consider Universal Design Criteria as well as design strategies for those with hearing and visual or reading impairments. Provide ample seating and wider sidewalks to support streets that are safe, comfortable, and convenient for everyone.

*See also Objective AM-2.3: People of All Ages and Abilities.*

BE-4.3.5 (EJ) Public Safety and Community Design. Enhance public safety in neighborhoods, centers, streets, and public spaces by providing street-fronting uses (“eyes on the street”), adequate lighting and sight lines, and features that cultivate a sense of community. Provide adequate public space for social/physical distancing during public health emergencies.

*See also Implementation Strategies BE-3.4b and AM-2.1h.*

BE-4.3.6 Active Ground Floor Uses. Encourage active ground floor uses such as retail stores and cafes in commercial and mixed-use projects along streets that prioritize bicycle and pedestrian travel in order to contribute to an active and engaging streetscape.

*See also Policy BE-3.2.4: Ground Floor Commercial Uses.*

BE-4.3.7 (LCP)(EJ) Green Space. Encourage publicly accessible green plazas, landscaping, and open spaces to be incorporated into the site design of new development projects in order to improve aesthetics, create more shade, increase pedestrian activity, and promote sustainability through the application of on-site prefiltration of stormwater. Encourage residential projects to provide public plazas or other types of open spaces that are accessible to the public or contribute visually to the public sphere.

BE-4.3.8 (LCP) Low Impact Streetscape Landscaping. Use low-maintenance native and/or drought-tolerant plant species in streetscape landscaping to minimize water consumption and maintenance. Install naturally drained, landscaped stormwater planters where appropriate on sidewalks, medians, bulb-outs, quasi-public parks, and plazas.

*See also Implementation Strategy AM-5.2f.*

BE-4.3.9 (LCP)(EJ) Urban Greening of Streets, Parking Lots, and Development Sites. Incorporate street trees to soften the linear appearance of streets, sidewalks, and building planes and provide shade at regular intervals to improve the pedestrian experience and the scenic qualities of corridors. Select appropriate trees and locate to increase shade for parking areas, buildings, and the public realm. Use trees to visually break up building facades, screen private spaces, create buffers between streets and pedestrian areas, and soften scale differences between buildings, with the co-benefit of reducing the urban heat island effect.

BE-4.3.10 Integrating the Arts. Encourage the inclusion of publicly visible and accessible murals, curbside art, decorative paving, sculpture, fountains, shade trees, and other features that provide character and community expression. Encourage private development projects to include artists as members of their design team.

Encourage functional features such as bike racks and benches to be designed as public art.

*See also Policy PPF-2.8.5: Integrating the Arts into Development Projects.*

BE-4.3.11 Connecting to Local History. Encourage public projects and private development to include interpretive information regarding the history of a site, neighborhood or community in public art displays, plazas, and courtyards to enhance the sense of community and convey the significance of a particular place. Where appropriate, encourage building styles and forms that reinforce a sense of place through the adaptation of local architectural influences.

*See also Policy BE-3.4.6: Heritage Tourism and Objective ARC-8.2: Historic Resources.*

### **Implementation Strategies**

BE-4.3a Provide clear and objective design standards and guidelines for pedestrian-oriented building and streetscape design in SCCC development standards and Community Design Guidelines. (Responsibility: Planning Department, Planning Commission, Board of Supervisors)

*See also Implementation Strategy AM-5.1d.*

BE-4.3b Support business improvement districts and community volunteer initiatives for projects such as beautification, tree planting, parking area and plaza management, and trash collection to strengthen the vitality and attractiveness of neighborhoods, commercial areas, and gathering places. (Responsibility: Department of Public Works, County Administrative Office, Board of Supervisors)

BE-4.3c Coordinate with property and business owners to integrate private drainage/outflows with low-impact design stormwater management systems located in the public realm. (Responsibility: Departments of Planning and Public Works)

BE-4.3d (LCP) Require projects to comply with the street tree guidelines of the Countywide Design Guidelines, SCCC, and Public Works Design Criteria (which incorporates the County's Street Tree Planting List and the Urban Forestry Master Plan). Review these resources and update as needed to ensure consistent County guidance, compliance with CalGreen requirements for parking lot tree cover, and clarification of maintenance and maintenance responsibilities. (Responsibility: Planning and Public Works Departments, Planning Commission, Board of Supervisors)

BE-4.3e (LCP) Consider updates to standards and plans to increase the tree canopy and the number of trees along public streets and in urban public spaces. Research grant opportunities for conducting street tree inventories and planting street trees, prioritizing disadvantaged communities and areas with heavy pedestrian use and a low percentage of street tree cover. (Responsibility: Planning, Public Works, and Parks, Open Space & Cultural Services [Parks] Departments, Planning Commission, Board of Supervisors)

BE-4.3f Designate sites throughout the County for art enhancement or gateways. Explore grant opportunities as well as partnership opportunities with private property owners and developers for design and installation of community gateway projects (Responsibility: Planning and Parks Departments, Arts Commission, Board of Supervisors)

BE-4.3g Within the Pleasure Point Commercial Corridor, explore opportunities to display public art by local artists that reflects Pleasure Point's unique history and culture at entry gateways, along Portola Drive, and on wide sidewalk spaces. Consider a cohesive series of art pieces that is highly visible and becomes an iconic feature for Pleasure Point. (Responsibility: Planning and Parks Departments, Arts Commission, Board of Supervisors)

BE-4.3h Consider amending the SCCC to require larger commercial and residential development projects to include decorative and/or functional art installations or interpretive historic displays that are accessible to the public. (Responsibility: Planning and Parks Departments, Arts Commission, Planning Commission, Board of Supervisors)