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The Coordinated Plan
Executive Summary
The Coordinated Plan provides a five-year blueprint for the implementation of public transit and social service transportation concepts described in the long-range San Diego Association of Governments (SANDAG) 2050 Regional Transportation Plan (2050 RTP). The Coordinated Plan is unique in that it combines the regional requirement for a Short-Range Transit Plan with the federal requirement for a Coordinated Plan into one concise planning document. Additionally, the combination of transit and social service transportation provides an opportunity to evaluate all available transportation services in the region.

Along with the evaluation of transportation services, the Coordinated Plan establishes a unified regional strategy to provide transportation to the most sensitive population groups in the county, including seniors, individuals with disabilities, and persons with limited means, among other recognized transportation-disadvantaged population groups. While there is currently a range of transportation services available to these population groups, gaps in service remain due to geography, limitations in transit service, funding constraints, eligibility, knowledge, and training. However, the availability of funding programs specifically tied to the Coordinated Plan enables SANDAG to help put strategies into action to help meet the identified unmet transportation needs of these population groups.

**Background Requirements**

Through a provision in the federal Moving Ahead for Progress in the 21st Century (MAP-21), which was signed into law on July 6, 2012, the Coordinated Plan must be developed and updated not less than once every four years. MAP-21 requires that the Coordinated Plan include the following components:

- An assessment of current transportation services
- An assessment of transportation needs for individuals with disabilities, older adults, and people with low incomes
- Strategies to address the identified gaps between current services and needs
- Priorities for implementation based on resources, time, and feasibility

**Detailed Plan Overview**

A prominent theme of this year’s plan is to further define the administration and implementation of MAP-21 in regards to specialized transportation grant programs, such as Section 5310, Enhanced Mobility for Seniors and Individuals with Disabilities. The Coordinated Plan not only helps to identify transportation-disadvantaged population groups, but also works to address the specific travel needs of each group. While past plans have focused on a passenger-first perspective toward planning, this plan addresses a more holistic view of what services will meet the population’s needs as a whole over the next five years. The following sections include a brief overview of the Coordinated Plan chapters.
Chapter 1 - Introduction

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

Chapter 2 - Community Outreach and Public Involvement

This chapter describes the extensive community outreach and public involvement that helped shape the 2014-2018 Coordinated Plan. The community outreach program included five outreach meetings within both the urban and rural areas of the region and one focus group, and satisfied the federal requirements to ensure diverse public input in determining local transportation needs.

Chapter 3 - Measuring Our Success

This chapter begins with an overview of the goals and policies of the 2050 RTP and how they have been refined and enhanced in this Coordinated Plan to evaluate the transit and social service transportation system. This is followed by the overall goals and objectives to guide the development of the transit and social service transportation systems over the next five years. Finally, since transit funding also is tied to state funding sources, a description of the state-mandated evaluation process also is included in this chapter.

Chapter 4 - An Inventory of Existing Public Transit and Specialized Transportation Services

This chapter provides an index of the existing public transit, specialized transportation services, and alternative transportation options within the San Diego region. Research is drawn from the services offered by both Metropolitan Transit System and the North County Transit District, along with information gathered from the SANDAG 2012 Transportation Provider Survey.

Chapter 5 - An Assessment of Transportation Needs

This chapter identifies transportation-disadvantaged sub-populations, including seniors, individuals with disabilities, low-income persons, veterans, refugees, asylum seekers and homeless youth, and provides an assessment of these populations’ transportation needs. These assessments are important for planning and operating effective transit and specialized transportation services. Census 2010 maps are included in this chapter to display the distribution of transportation-disadvantaged populations.

Chapter 6 - Strategies, Activities and Projects to Address Transportation Gaps

This chapter identifies gaps in transportation services and strategies to address those gaps. The analysis and identification of service gaps within San Diego is based on a compilation of sources ranging from a review of the Chapter 5 Census 2010 demographic data, from the availability of transit service, and outreach efforts targeting both transportation providers and passengers. The identification of service gaps, as well as strategies to meet those gaps found in this chapter, sets the stage for the prioritization of strategies developed for Chapter 7.
Chapter 7—Priorities for Project Funding

This chapter provides strategic direction to assist SANDAG in selecting projects funded through the Job Access and Reverse Commute (JARC) and New Freedom programs under Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users, Section 5310 under MAP-21, and TransNet Senior Mini-Grant programs. The strategies in this section were developed to meet the regional transit and specialized transportation needs as identified through the various outreach efforts, demographic research, previous survey efforts, and transportation inventory analysis completed over the last five years.

Chapter 8 - Funding

This chapter describes the major sources of public transit and specialized transportation funds available from federal, state, and local sources. The chapter includes detailed tables noting funds distributed to date through the SANDAG specialized transportation programs and reviews other potential regional and local revenue sources.

Chapter 9 - Implementation

This chapter explains how SANDAG will serve as a conduit for federal, state, and local funding of existing and future services recommended in this Coordinated Plan. Under current federal regulations, the Coordinated Plan enables the distribution of federal funding under the Section 5310 program. The Coordinated Plan also allows the distribution of local funding for projects targeted at seniors (through the Senior Mini-Grant program), which was created through the regional transportation sales tax measure (TransNet). The Program Management Plan (Appendix E) describes the procedures to be followed under the various grant program competitive processes and provides an overview of the monitoring and reporting requirements that follow project funding.

A Regional Service Implementation Plan (RSIP) also is included in this chapter to help ensure that annual transit operational changes are consistent with longer-range regional transportation goals included in the 2050 RTP. The RSIP also includes the identification of future services and needs to address regional priorities articulated in the 2050 RTP and enhanced in the Coordinated Plan.
Chapter 1
Introduction
CHAPTER 1: INTRODUCTION

The 2014-2018 Coordinated Plan represents the sixth edition of this plan, which is designed to implement the goals and policies articulated in the 2050 Regional Transportation Plan (2050 RTP) and to fulfill federal requirements under the Moving Ahead for Progress in the 21st Century (MAP-21) legislation for Federal Fiscal Year 2014 and beyond. The Coordinated Plan refines the RTP goals and in so doing, creates an implementation plan funded by local, state, and federal sources for fixed-route transit and specialized transportation services. The Coordinated Plan has served as the regional short-range transit plan since 2007, providing the framework for transit system development over the next five years that reflect the goals and direction for service development as described in the 2050 RTP. The planning processes were combined in 2007 to coordinate resources for regional transit planning and specialized transportation. The Coordinated Plan involves the identification of transit needs from a passenger perspective and includes strategies to meet those needs. The Coordinated Plan also serves as a specialized transportation plan for transportation disadvantaged populations, such as persons with limited means, individuals with disabilities, and seniors. The Coordinated Plan is used by eligible public (i.e. MTS and NCTD) and private transportation operators and social service providers to identify a list of prioritized projects eligible for funding through local and federal specialized transportation grant programs.

The 2014-2018 Coordinated Plan is the first edition under the new federal surface transportation bill, MAP-21, signed into law on July 6, 2012. For this reason, a key highlight of this plan is the in-depth discussion of how MAP-21 may shape the future of specialized transportation grant programs. The plan will serve as a resource to both existing and future specialized transportation providers in the urban and rural areas of San Diego. As the regional short range transit plan, the Coordinated Plan should also assist the region’s transit operators in identifying and potentially addressing any identified gaps or needs as designated through this plan where fixed-route transit is appropriate.

1.1 Envisioning a New Regional Short-Range Transportation Plan

This Coordinated Plan includes all publicly available transportation services into one unified plan, as required by federal legislation. The difference between previous RSRTP and the Coordinated Plan is that the RSRTP only included traditional public transit operators; now the Coordinated Plan expands the dialogue to also include transportation provided by social service transportation providers. Social service transportation providers can include private companies, nonprofit organizations, regional transportation assistance programs, and governmental or quasi-governmental social service agencies. These services also are referenced as “specialized transportation” in this plan.

Given this broad approach, the Coordinated Plan envisions a new regional short-range plan that identifies needs and opportunities to expand or improve upon the existing transportation service framework, collaborates with all transportation providers to remove inefficiencies caused by redundant or duplicative services, and addresses social equity, environmental justice, and Title VI issues pertaining to transportation. While it is important to develop new transit services to support...
the region’s growing population, it is equally important to maintain and optimize the existing system to address current travel demands, improve the quality of service for our existing riders, and enhance its appeal to new rider markets. The Coordinated Plan seeks to improve transportation options for all populations by promoting coordination among agencies actively involved in transportation and encouraging innovative and cost effective solutions for a more seamless network of services in the San Diego region.

1.2 PLAN REQUIREMENTS

The Coordinated Plan responds to mandates stemming from federal, state, and local guidelines which are described below.
The current transportation act, Moving Ahead for Progress in the 21st Century (MAP-21), requires that a Coordinated Plan be developed in order to distribute federal funds for specific programs.

Requires that regional transportation planning agency identify, analyze, and recommend potential productivity improvements and make recommendations for improvements including, but not limited to, those recommendations made in the triennial TDA performance audit.

Establishes the goals and objectives for short-range transit services, sets the framework for a transit operations performance monitoring program.

Affiliated Funding Programs:
- Elderly and Persons With Disabilities (Section 5310)
- Senior Mini-Grant (Local TransNet Sales Tax)
Federal Requirements

The federal transportation bill preceding MAP-21, Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), included the first requirement for a “locally developed, Coordinated Public Transit-Human Services Transportation Plan” (Coordinated Plan). MAP-21 maintained the Coordinated Plan requirement; however, there were significant changes to the associated specialized transportation grant programs under the new bill.

Under SAFETEA-LU, there were three specialized grant programs that required projects to be derived from the Coordinated Plan:

- **Job Access and Reverse Commute (JARC):** funds projects transporting low income individuals to and from jobs and activities related to employment, and reverse commute projects. Funding apportioned to Metropolitan Planning Organizations (MPOs) for large urbanized areas and States for small urban and rural areas.

- **New Freedom:** funds projects for new public transportation services and new public transportation alternatives beyond those required by the American with Disabilities Act of 1990, which are designed to assist individuals with disabilities. Funding apportioned to MPOs for large urbanized areas and States for small urban and rural areas.

- **Transportation for Elderly Persons and Persons with Disabilities (5310):** provides formula funding to States to fund capital expenses to assist private non-profit transportation providers in meeting the special needs of older adults and persons with disabilities.

Significant changes to MAP-21 include the end of both JARC and New Freedom as distinct programs. JARC projects exist in MAP-21 as an eligible activity under the rural (5311) and urbanized area (5307) formula funding programs. The Caltrans Division of Mass Transportation (DMT) is responsible for administering the rural formula funding program, while the San Diego Association of Governments (SANDAG) is responsible for administering the urbanized area formula program.

New Freedom-type projects remain eligible for federal funding under MAP-21 through the significantly altered 5310 program (Enhanced Mobility of Seniors and Individuals with Disabilities). In addition to renaming the program and expanding the activities eligible for funding through the program, the legislation allows for flexibility in the administration of the program. While funds were previously allocated directly to the state (Caltrans DMT in California), MAP-21 allows MPOs to take over the administrative responsibility for the 5310 program as the designated recipient for large urbanized areas. Funding for small urban and rural areas is apportioned to the state.

Federal Fiscal Year 2012 was the final year that funding was authorized under SAFETEA-LU, so these changes to the program become relevant beginning with Federal Fiscal Year 2013 funding.
State Requirements

The Transportation Development Act (TDA) of California provides one-quarter percent of the state sales tax for operating and capital support of public transportation systems and non-motorized transportation projects.

Local Requirements

SANDAG requires that a RSRTP be developed, which provides a five-year blueprint of how the transit concepts described in the RTP are to be implemented. The Coordinated Plan fulfills this requirement. The combined RSRTP and Coordinated Plan includes:

- Goals and objectives for short range transit services
- Definition of the existing transit system
- Framework for a transit operations performance monitoring program as required by the TDA, and a monitoring program for social services transportation as defined by the Federal Transit Administration (FTA)
- Identification of service gaps and deficiencies
- Evaluation of existing services and programs
- Parameters for short-range (0-5 years) new and revised service development, as well as regionally significant and all other service adjustments
- Methodology for evaluating proposals for new and revised service
- Identification and prioritization of regional and subarea transit planning studies
- Evaluation and prioritization of new and revised services for implementation, including the adoption of an annual Regional Service Implementation Plan

The Coordinated Plan also facilitates the distribution of local funding for senior programs through the Senior Mini-Grant program, which was created through the 1/2 cent regional transactions and use tax extension measure (TransNet II). In order to enhance and promote coordination, all projects funded by the Senior Mini-Grant program also must be consistent with the Coordinated Plan.
1.3 A Passenger-Centered Approach

In addition to bringing public transit and specialized transportation under one planning umbrella, the Coordinated Plan represents a “passenger-centered” approach to finding transportation solutions for the region’s residents. Under this approach, the first step is to identify and define the mobility needs of the public and the service constraints and then determine the most appropriate solution, such as conventional fixed-route public transit, Americans with Disabilities Act paratransit, or specialized transportation programs.

There are two types of transit riders: the transit dependent (those that are dependent on transit services to access work, personal and social destinations) and the discretionary rider (those who have access to a private vehicle, but ride transit based on a personal preference). Each type of rider is vital to the sustainability of the transit network, therefore, this plan will identify service strategies and projects to meet the needs of the transit dependent and the discretionary rider.

1.4 Performance Monitoring

The incorporation of social service transportation into public transportation planning represents new opportunities, including a chance to define public transportation policies and objectives for the region. The Coordinated Plan includes a series of goals and objectives by which the complete public transportation system will be measured in future years. The Coordinated Plan incorporates elements contained in previous RSRTPs relating to the transit agencies, but more clearly evaluates those transit services by specific location type (urban, suburban, and rural) along a five-year horizon. The methodology includes and expands upon the performance measures suggested in the California TDA evaluation processes (see Chapter 3 for more information).

1.5 Specific Populations and Plan Components

The Coordinated Plan focuses on the identification of specific population groups that are more likely to be dependent on public transit and specialized transportation. These groups, which have been federally mandated for inclusion in the Coordinated Plan, are:

1. **Older adults**: Includes, at a minimum, all persons 65 years of age or older.

2. **Individuals with disabilities**: Includes individuals who, because of illness, injury, age, congenital malfunction, or other incapacity or temporary or permanent disability (including an individual who is a wheelchair user or has semi-ambulatory capacity) cannot effectively use public transportation service or a public transportation facility, without special facilities, planning, or design.

3. **Persons with limited means**: Refers to an individual whose family income is at or below the 150 percent poverty line threshold set in JARC Federal Circular\(^1\).

In addition to identifying needs, the Coordinated Plan has been developed to respond to a transportation system that has grown to include a greater number of demand responsive services,

\(^1\) SANDAG tracks poverty at both the 100 and 150 percent poverty line thresholds in order to understand all levels of poverty. Maps and analysis found in this plan will show the 150 percent poverty line which is based on SAFETEA-LU (per FTA C 9050.1).
potential opportunities for innovative technological enhancements, social service agency assistance programs, and cooperative arrangements. The Coordinated Plan includes the following elements “at a level consistent with available resources and the complexity of the local institutional environment” as required by the federal government:

- An inventory and assessment of available services that identifies current transportation providers from the public, private, and nonprofit sectors
- An assessment of transportation needs for older adults, individuals with disabilities, and persons with limited means – this assessment can be based on the experiences and perceptions of the planning partners or on more sophisticated data collection efforts and gaps in service
- Strategies and/or activities to address identified gaps in service and achieve efficiencies in service delivery
- Identification of coordination strategies to eliminate or reduce duplication in services and strategies for more efficient utilization of resources
- Priorities based on resources, time, and feasibility for implementing the specific strategies/activities identified

In addition to identifying the types of populations most dependent on specialized transportation services, the 2014-2018 Coordinated Plan will also serve as a resource for specialized transportation programs and other affiliated organizations in helping to better serve their clients’ distinct needs. While the plan recognizes available services within the region, it will also call out innovative and resourceful programs that are, perhaps, not available presently within San Diego, but may serve as a potential option to respond to the identified individual passenger’s needs. Specifically, the plan provides:

- An inventory of existing specialized transportation services catered for each population need
- A regional assessment of transportation needs for seniors, individuals with disabilities, and persons with limited means based on best-practices research conducted across the country
1.6 LOOKING FORWARD

The operational design of transportation services developed to reduce or eliminate gaps and deficiencies identified in the Coordinated Plan are the responsibility of the transit agencies and the other members of the transportation community. In some cases, these organizations may apply for funding under the competitive grant programs administered by SANDAG to fulfill projects identified and prioritized in the Coordinated Plan.

The Coordinated Plan also has been developed so that the two local transit agencies and transportation providers receiving local and federal funding can address any deficiencies identified through the performance monitoring program included in the Coordinated Plan. This process involves preparation of the annual Service Implementation Plans, which are prepared by the transit operators and incorporated into the Coordinated Plan to address annual service changes and improvements.

The continued attention to include rural transportation needs enables transportation projects to be eligible for additional federal funding (specifically 5310 and 5311) apportioned for the rural areas and administered by Caltrans DMT. Both the rural and urban transportation needs are articulated in Chapter 5 and organized as prioritized strategies in Chapter 7. The priorities are designed to provide a guide for responding to transportation funding opportunities. Chapter 4 provides a detailed guide to special transportation needs for different population groups, and the most appropriate transportation service parameters based on those population groups’ individual needs.
The Coordinated Plan
Chapter 2
Community Outreach and Public Involvement
The Federal Transit Administration requires that the Coordinated Plan be prepared and updated at least every four years and include significant public outreach. Since the inception of the Coordinated Plan, the San Diego Association of Governments (SANDAG) has chosen to prepare updates to the Coordinated Plan at least every other year, with public outreach adjusted to reflect the extent of proposed revisions to the document. Appendix A includes the public outreach documentation for the outreach effort conducted over the past year, which includes an outreach schedule, presentation summaries, workshop advertisements, etc. The 2014-2018 Coordinated Plan involved five outreach meetings, a presentation and discussion at the quarterly Tribal Transportation Working Group, and one focus group (outlined in the section below). The outreach meetings were held throughout the region in both urban and rural settings to encourage broad community participation, while the focus group was held at the SANDAG offices. Additionally, SANDAG worked with the Community Based Organizations (CBOs) on contract for development of San Diego Forward: The Regional Plan – SANDAG’s combined Long-Range Transportation and Comprehensive Regional Plan – and other agency efforts. The CBOs served as an additional outreach arm for SANDAG to receive participation from local community groups that may not have otherwise participated in the Coordinated Plan outreach. A public hearing on the proposed plan was conducted by the Social Services Transportation Advisory Council (SSTAC) in San Diego on September 16, 2013, and a public hearing will be held by the SANDAG Transportation Committee on July 18, 2014, followed by a Board of Directors meeting on July 25, 2014.

2.1 Public and Stakeholder Involvement

A public outreach component including a wide variety of organizations is required for the development of the Coordinated Plan. It is required that the Coordinated Plan be updated at least every four years in air quality nonattainment and maintenance areas and five years in air quality attainment areas. However, SANDAG consolidates its Coordinated Plan responsibilities with the

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1 While not included in this list of outreach events, SANDAG was also present at the Southwestern College Disability Awareness Celebration Day event held on October 1, 2013, to gather comments on specialized transportation services.

2 The California Public Utilities Code (CPUC) requires SSTAC to hold at least one public meeting each year for the purpose of soliciting input from transit-dependent disadvantaged persons, including seniors, persons with disabilities, and persons of limited means.

3 Organizations may include, but are not limited to, state and local officials and elected representatives/tribal governments, private/public/nonprofit/Americans with Disabilities Act (ADA) transportation providers, social service agencies involved in transportation, taxi service providers, intercity bus operators, vanpools, flex car operators, business community/employers, economic development agencies, transit riders and potential riders, protection and advocacy organizations, agencies that administer employment or other support programs for targeted populations, faith-based and community-based organizations, and school districts/colleges.
regional requirement to develop a Regional Short-Range Transit Plan not less than every two years. The federal guidance states that the Coordinated Plan should be developed through a process that includes the representatives of public, private, and nonprofit transportation providers, as well as participation by members of the public. Furthermore, the guidelines stipulate that members of the public should include representatives of the targeted populations, including older adults, individuals with disabilities, and people with low incomes. The guidance also recommends consultation with an expansive list of stakeholders throughout all phases of the Coordinated Plan development.

Social Services Transportation Advisory Council

The main group involved in the development of the 2014-2018 Coordinated Plan was the Coordinated Plan Adhoc Group (CPAG), which is a temporary group made up of less than a quorum, of SSTAC. The CPAG was specifically formed to guide the development of the Coordinated Plan and provide qualified expertise toward enhancing the region’s passenger-centered transportation network. The group was comprised of community members, social service representatives, transit operators, and a member from the County’s Health and Human Service Agency.

While the CPAG’s primary responsibility is to guide the conversation of the Coordinated Plan development, similarly the mandate of the SSTAC is to assist SANDAG with responding to federal and state requirements, as well as local concerns and involvement in accessibility issues. Responsibilities of the group also include review and advice on federal funding programs for the elderly and disabled and coordination of vehicles for elderly and disabled persons. As such, the group provided an excellent fit to guide the development of the Coordinated Plan.

In order to ensure consistent participation in the Coordinated Plan development by stakeholders and members of the public, the SSTAC provided input and feedback at both regular and special meetings. The composition of this group includes the following representatives:

- One of potential transit users who is 60 years of age or older
- One of potential transit users who is a person with a disability
- Three of the interests of seniors, persons with limited means, or disabled transit users who are well versed in the Americans with Disability Act (ADA) and Title 24 regulations
- Two of the local social service providers for seniors, including one representative of a social service transportation provider, if one exists
- Two of local social service providers for individuals with disabilities, including one representative of a social service transportation provider, if one exists
- One of a local social service provider for persons of limited means
Two from the local consolidated transportation service agency, designated pursuant to Subdivision a of Section 15975 of the Government Code, if one exists, including one representative from a transportation service provider, if one exists

- One from North County Transit District (NCTD) representing fixed-route service
- One from NCTD representing ADA Paratransit service
- One from Metropolitan Transit System (MTS) representing fixed-route service
- One from MTS representing ADA Paratransit service

Regional Transit Planning Task Force

The Regional Transit Planning Task Force also contributed to the update of the plan. It includes staff members from the two transit operators in the County, MTS, and NCTD, along with members from SANDAG and the Consolidated Transportation Service Agency. The Task Force is responsible for providing insight and guidance of the planning efforts identified in the latest 2050 Regional Transportation Plan (2050 RTP) to be implemented in the next five years. Being as the Coordinated Plan is, in its capacity, the Short-Range Transit Plan, the Coordinated Plan provides the framework for transit system development over this five year period and equally reflects the goals and direction for service development as described in the 2050 RTP. Utilizing the plan as a conduit for addressing future planning objectives, the group discussed the Coordinated Plan at its quarterly meetings and provided input into the development of the updated edition of the Coordinated Plan. SANDAG staff also met with MTS and NCTD separate from the Task Force meetings to discuss how the Coordinated Plan can aid in their respective short range transit planning processes. Additionally, transit staff from both MTS and NCTD provided key performance measures utilized in Chapter 3 and Appendix L. Transit agency staff members also provided the Service Implementation Plans (Appendix F) used to develop the Regional Service Implementation Plan included in Chapter 9.

2.2 Outreach Efforts

Public Outreach Meetings

For the update process, staff held five outreach meetings throughout the region, in addition to one presentation at the quarterly Tribal Transportation Working Group to solicit input on the region’s transit and specialized transportation needs. While in year’s past, such outreach meetings have consisted of a brief presentation on the purpose and need for a Coordinated Plan followed by a “dot preference” exercise, for this update, Staff employed new outreach techniques to help discern the public’s top transportation concerns.

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4 For this activity, meeting participants each received 10 sticker dots. Each participant was to place one or more sticker dots on one or more priorities listed on three separate priority lists (low-income, senior, or people with disabilities). Depending on the meeting’s location, the priority list was either for the urbanized or not-urbanized areas of San Diego.
Each meeting consisted of a brief introduction to the Coordinated Plan, with the majority of each meeting spent listening to the public discuss relative topics such as accessibility, availability of services, affordability, safety and security, and service friendliness, among other items (a full list of the questions posed to the community members can be found in Appendix A, in both English and Spanish). Participants could either share their input orally on each topic, or could write down their thoughts on a distributed handout that included each prompting question. Based on the feedback received, Staff was then able to incorporate the input with existing strategies, or propose new strategies altogether. A summary of the outreach presentation and findings can also be found in Appendix A.

The public outreach meetings were held in afternoons and evenings, at familiar community spaces and were accessible by public transit. Additionally, bilingual translators were utilized to encourage non-English speaker participation in the outreach process.

**Focus Group**

In a separate effort to participate in a more refined conversation on the transportation needs of seniors, persons with disabilities, and people of limited means, Staff conducted a focus group. The group was comprised of eleven select experts in three different categories: institutional/research foundations with subject-area expertise in low-income, senior, or persons with disabilities representation; social service providers; and riders of transit/specialized transportation. Facilitated by a Senior SANDAG Research Analyst, the group was prompted to discuss the region’s transportation needs, opportunities to improve service and coordination, and strategies to overcome existing barriers to overall coverage/service.

**SANDAG Community Based Outreach Partnerships**

In an effort to gain additional insight on the needs and existing gaps in specialized transportation and public transit in the region, and ensure that all communities were meaningfully involved in the development of the plan, staff worked with a network of eleven community-based partners that were, at the time of this plan, on contract for the development of San Diego Forward: The Regional Plan. Such community collaboratives are critical to the ability of the regional planning agency to reach out to vulnerable communities that otherwise might not become involved in the process. SANDAG developed a map that uses census data for low-income and minority populations to assess the region’s most vulnerable communities. A competitive Request for Proposals process was established, of which eleven community-based network partners were selected. The partners provided input in one of two ways: hold a Coordinated Plan-specific meeting in lieu of a regularly scheduled member meeting to discuss the needs and gaps of a particular community or agency that they represent; or during their contract with SANDAG, have a standing item on their regular

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Provided intervening analysis by SANDAG, this exercise drove the determination of the “Very High” and “High” priority list of projects for grant funding allocation. Since, however, SANDAG staff has used this strategy for the past Coordinated Plans and has gathered consistent feedback, new outreach strategies were conducted for the 2014-2018 Coordinated Plan update.
meeting agendas that would discuss transportation gaps and unmet needs. A list of the CBO’s currently on contract can be found in Appendix A.

**SSTAC Public Hearing**

The CPUC requires that the SSTAC hold at least one noticed meeting to receive comment from the public on transportation issues. In 2013, this meeting was held on September 16, 2013, to solicit the input of transit-dependent and transportation-disadvantaged persons, including seniors, persons with disabilities, and persons with limited means. Appendix A contains the public notice used for this meeting.

**Public Comment Period**

The SANDAG Public Participation/Involvement Policy establishes a process for obtaining input from, and providing information to the public. Public outreach is conducted concerning agency programs, projects, and program funding in order to ensure the public is informed and has the opportunity to provide SANDAG with input so plans can reflect the public’s desire. In addition to the feedback received at the SSTAC Public Hearing, SANDAG has also incorporated input gathered from the various public outreach meetings held throughout the County. Comments received for the Coordinated Plan within the comment period and any appropriate revisions were included in the final document. Additionally, throughout the update process, an electronic comment card was hosted on the Coordinated Plan webpage, www.sandag.org/CoordinatedPlan, of which all comments were recorded and factored into the plan’s development, as appropriate.

**SANDAG Public Hearing**

SANDAG Board Policy requires the approval of the Coordinated Plan by the SANDAG Transportation Committee be held after a public hearing. The public hearing will be held on July 18, 2014.
The Coordinated Plan

Chapter 3

Measuring Our Success
3.1 Purpose

The performance monitoring program was developed to retain a regional perspective on the transportation system as a whole, but it also assists the transportation agencies with their evaluation of current or future service expansions or contractions. In addition, with an understanding that public transit is not always an appropriate or applicable service for some users, social service transportation evaluation has been included to round out the entire context of available transportation solutions within the region. Monitoring of these programs helps to develop an understanding of their contribution to the host of transportation solutions available.

This chapter begins with an overview of the goals and policies of the 2050 Regional Transportation Plan (2050 RTP) and how they have been refined and enhanced in this Coordinated Plan to evaluate the transit and social service transportation system. This is followed by the overall goals and objectives to guide the development of the transit and social service transportation systems over the next five years. Finally, since transit funding also is tied to state funding sources, a description of the state-mandated evaluation process is included in this chapter.

3.2 Vision and Goals

The San Diego Association of Governments (SANDAG) 2050 RTP is the long-range blueprint for a regional transportation system that further enhances the quality of life, promotes sustainability, and offers more mobility options for people and goods. The Coordinated Plan implements the RTP transit and social service transportation vision on a rolling five-year time period. The RTP vision describes a transportation system that:

- Supports a prosperous economy
- Promotes a healthy and safe environment, which includes climate change protection
- Provides a higher quality of life for all San Diego County residents

The development of transit and specialized transportation services can enhance these elements in developing a more sustainable future transportation system. Furthermore, the RTP expands this vision into six specific goals surrounding two themes, Quality of Travel and Livability, and Sustainability:

**Quality of Travel and Livability**

1. Mobility: the transportation system should provide convenient travel options
2. Reliability: the transportation system should be reliable

3. System Preservation and Safety: the transportation system should be well-maintained to protect the public's investments in transportation

**Sustainability**

1. Social Equity: the transportation system should be designed to provide an equitable level of transportation services to all segments of the population

2. Healthy Environment: the transportation system should promote environmental sustainability and foster efficient development patterns that optimize travel, housing, and employment choices

3. Prosperous Economy: the transportation system should play a significant role in raising the region's standard of living

In order to specifically evaluate transit and social service transportation in the San Diego region, a series of 11 goals for the coordinated transportation network was developed. These goals were based on the visions of the four agencies (Metropolitan Transit System [MTS], North County Transit District [NCTD], Consolidated Transportation Services Agency [CTSA], and SANDAG) involved in planning and operation of the transportation system, along with the overarching goals of the 2050 RTP identified above.

The coordinated transportation network goals along with their relevant 2050 RTP goals are:

1. Develop a network of fast, flexible, reliable, safe, and convenient transit services that maximize the role of transit in the region and reduce vehicle miles traveled and Greenhouse Gas (GHG) emissions (*Mobility and Healthy Environment*)

2. Offer accessible public and social service transportation services in San Diego that are reliable, offer competitive travel times to major destinations, and provide consistent travel times for the same trip and mode of transportation (*Reliability*)

3. Reinforce and upgrade existing transit services in key urban corridors, and pursue new transit projects in the most urbanized areas of the region using a broad combination of transit modes (*System Preservation & Safety*)

4. Maximize the farebox recovery rate and ensure that operation of the transit system is fiscally responsible (*System Preservation and Safety*)

5. Offer accessible public and social service transportation services in San Diego without discrimination on the basis of race, color, language, national origin, or disability (*Social Equity*)
6. Enhance the mobility choices of the transportation disadvantaged by improving coordination and developing alternative models of transportation (Social Equity)

7. Provide accessible lifeline public and social service transportation to all populations (Social Equity)

8. Develop a strong link between transit and transit supportive land use patterns to maximize the cost-effectiveness of future transit investments (Healthy Environment)

9. Offer accessible public and social service transportation services that support the smart growth policies as outlined in the Regional Comprehensive Plan (Healthy Environment)

10. Offer affordable and accessible public and social service transportation services that are productive, coordinated, convenient, and appropriate for the markets being served (Healthy Environment and Prosperous Economy)

11. Provide an accessible transit network in the urban areas that offers frequency and span of service to support spontaneous use for a wide range of needs to support a diverse economy (Prosperous Economy)

### 3.3 Regional Performance Evaluation Program

The objectives and performance indicators included in the regional performance evaluation program evaluate transit service on a five-year time horizon. This allows SANDAG to more carefully evaluate transit performance and to ensure that additional planning and funding resources are allocated appropriately. This section provides the evaluation of transit service and indicators to monitor social service transportation as originally required by the federal government in Safe, Accountable, Flexible, and Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU). Future updates to the Coordinated Plan will include performance monitoring requirements as prescribed by the Federal Transit Administration (FTA) under Moving Ahead for Progress in the 21st Century (MAP-21).

**Regional Transit Service Monitoring, Implementation, and Links to the RTP**

The monitoring of transit performance provides a tool to annually assess the overall health of the regional public transit system. The objectives explored in this section are derived from the 2050 RTP and Coordinated Plan goals and specifically fall under two categories, fixed-route transit and specialized transportation. As articulated in the 2050 RTP, the development of an ambitious and far-reaching transit network that significantly expands the role that transit plays in meeting the region’s mobility needs is dependent on the development of three key strategies:
Improvements to the current system that will improve the convenience and travel speeds of bus and rail services

Implementation of new transit services that will improve transit connections and access in key urban areas and offer new service types designed to attract new riders to transit

Enhancements to the transit customer experience to make transit easier, safer, and more enjoyable to use

The 2050 RTP also places more attention on transportation for seniors, people with limited means, and individuals with disabilities. While the 2050 RTP provides a broad framework for these services, the Coordinated Plan provides the specific strategies to guide these investments. To accomplish this, the 2050 RTP identifies funding for supplemental specialized transportation services, which is estimated to be five percent of the cost of fixed-route transit.

Guidelines versus Targets

Under these 2050 RTP action items, the general approach to evaluating transit and social service transportation includes the setting of guidelines where the requirement is in a SANDAG policy or the requirement is a target in state or federal regulations. The guidelines presented in this chapter are based on a five-year service objective, which can be adjusted, as needed, to reflect changing conditions. These conditions may include, but are not limited to: funding, energy costs, and the health of the local economy. The guidelines also may be updated to reflect changes in funding levels or from a desire to adjust service levels. On the other hand, the identified targets are based on requirements established by state and federal legislation or regulations.

Interpreting the Results

The results of the performance indicators give the transit agencies, SANDAG, the public, and elected officials valuable information, including:

- Evaluation of regional transit system performance
- Determination of whether sufficient funding is being provided to the regional transit system to meet the guidelines and targets
- Indication of the need for transit priority measures and, once implemented over time, how well they are performing in terms of improving transit performance
- Assessment of regional efforts to better link transit and land use planning through regional smart growth programs
- Identification of deficiencies or service gaps

Service Zones

The Coordinated Plan must integrate the transit vision of the 2050 RTP, the smart growth objectives of the Regional Comprehensive Plan (RCP), the short-term service objectives of the MTS Comprehensive Operations Analysis (COA) and NCTD’s Comprehensive Strategic, Operating and
Capital Plan. To do this, the San Diego region was divided into three distinct types of service zones based on land use, demographics, and travel behaviors in order to more carefully evaluate transit service in these zones. These three zones are urban, suburban, and rural, which are shown in Figure 3.1. The objectives, indicators, and guidelines or targets provide policy direction to the two transit agencies as they implement service to ensure that it is provided efficiently, effectively, and equitably across the entire service area. The objectives and indicators usually apply across all zones, but the guidelines will generally vary by zone reflecting the different needs and markets in the urban, suburban, and rural zones.

1 These zones do not correlate to the census designated urbanized and rural areas used to apportion federal funding sources, such as JARC and New Freedom.
Figure 3.1: Service Zones
The urbanized area boundary was developed through the 2050 urban area transit strategy shown in Figure 3.1. The largest urban area within the urban zone covers the denser central, south, and east county areas and extends from University City on the north to Imperial Beach in the south and from the coast east to El Cajon. The northern urbanized area follows the SPRINTER corridor in North County and includes parts of Oceanside, Escondido, Carlsbad, Vista, and San Marcos. The coastal urban zone generally covers the lands between I-5 and the Pacific Ocean from La Jolla to Oceanside. The urban zones are characterized by two key factors that support high levels of transit service: higher-density, transit-oriented land uses (residential, commercial, industrial, institutional) and good access to transit via a network of arterial and collector roadways. A rich transit network in this zone should be provided and designed to allow for spontaneous use for a wide range of destinations and trip needs throughout the day, including early evening.

The suburban zone surrounds the urban zone. The suburban zone is characterized by low-density development and street patterns that make access to transit difficult. These areas may include some smart growth development, including pockets of transit-oriented residential, commercial, and institutional uses; however, the overall development pattern is not always transit friendly for fixed route services. The result is that spontaneous transit use is more challenging here, requires a greater sensitivity to local conditions, and a larger repertoire of solutions to be effective. Thus, transit services in the suburban zone are best oriented toward providing peak-period commuter services, linkages to major destinations in key travel corridors, and community-based services tailored to individual community needs. The provision of park-and-ride facilities is needed to maximize access to the peak-period commuter services.

The rural zone extends from the eastern edge of the suburban zone into the backcountry areas. The limited transit services are designed to maintain lifeline access to rural villages.

The zones were initially developed to support planning for public transportation; however, in the future they also may become a useful tool in planning for social service transportation. It may become necessary in the future to use the zones as means of prioritizing social service transportation needs and expenditures. For example, it seems unlikely that the region will be able to provide the same level of social service transportation services and mobility choices for people living in rural areas as for those people who are living in urban areas.

Methodology and Performance Indicator Development

Care has been taken to identify objectives that can easily be quantified and indicators that can be objectively measured with existing or proposed data sources. Should the development of new transportation funding sources arise, or if unspent fund balances are re-allocated for local programs, the evaluation of transit service performance may enable the justification for the programming of future funds for transit given the ongoing evaluation of actual quantitative performance data.

The goals and objectives influence the design and quality of the transit service and implement the transit vision of the RTP. The RTP policy goals and objectives are to be applied across the entire
county, while the performance indicators and guidelines have been tailored to specific environments. The guidelines help provide clarity for decision makers and the public regarding the level of transit service proposed to be provided regionally and assist individuals in making decisions on where to locate their residence, place of employment, choose a school, or location for their business.

**Comprehensive Performance Evaluation Categories**

The comprehensive objectives are based on regional issues as they relate to transit and social service transportation. These objectives include multiple variables or results, which have regional impacts beyond transit or social service transportation. The passenger-centered comprehensive objectives address the following categories:

- GHG Reduction Measures
- Regional Growth

**Transit Performance Evaluation Categories**

The transit objectives are based on sub-regional areas that group similar geographic or demographic areas. These objectives either relate to the goals of the RCP, the RTP, or have consistently been tracked through the annual Transportation Development Act (TDA) performance improvement program. The transit objectives address the following categories:

- Financial
- Productivity
- Access
- Convenience
- Reliability and Speed
- Environmental Justice
- Comfort

A brief description of the performance results relating to these categories is included in this chapter, while the detailed statistical tables are included in Appendix L. This report also includes data sets reported in prior years in order to ensure statistical continuity between previous Regional Short-Range Transit Plans and future Coordinated Plans (Appendices B and C). It is anticipated that in future plans, this data set will be improved and expanded as new data from automated sources becomes available to encompass social service transportation.
Comprehensive Objectives

The comprehensive objectives outlined below involve more than just transit or social service performance data. The climate change indicator includes an evaluation of the future benefit of transit toward regional GHG reduction targets, while the growth objectives looks at transit ridership compared to other growth measures in the region.

GHG Reduction Objective

Public transit can play an important role in the reduction of regional GHG emissions to combat global climate change. In doing so, transit can contribute to the emissions reductions targets included in California Senate Bill (SB) 375 (Government Code Section 65080 et seq.) for passenger cars and light-duty trucks. Quantifying potential GHG emissions reductions from transit operations will help achieve the draft targets set by the California Air Resources Board required by SB 375. This analysis also will support the SANDAG development of a Sustainable Community Strategy, also required by SB 375. Since passenger cars and light-duty trucks account for about 41 percent of the region's cumulative GHG emissions, transit's role is potentially substantial in order to curb GHG emissions down to desired levels. All new bus fleets are Compressed Natural Gas and eventually the entire region will be 100 percent run on alternative fuels. The anticipated benefits of transit ridership on GHG reductions will be quantified and incorporated into future Coordinated Plans.

The transit GHG reduction objective and guideline are as follows:

Objective: Reduce regional GHG emissions

Guideline: Reduced carbon emissions from the expansion or addition of regional transit services

Result: No result because no regional services were added or changed in FY 2013

Growth Objective

In the San Diego region, ridership growth is measured against growth in population and against growth in employment and growth in vehicle registrations. The need to increase transit ridership is a corollary to the service growth projected in the RTP. In addition, many existing services have additional capacity to handle more riders at no additional cost; however, much of the capacity is in the off-peak direction or during off-peak periods. To take advantage of this capacity may require land use change and significant transit-oriented development, which is beyond the direct control of SANDAG and the transit operators.

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2 From the September 2008 “San Diego County GHG Inventory” report prepared by the Energy Policy Initiatives Center (EPIC), University of San Diego.

3 Available reporting methodologies include the Climate Registry’s "Performance Metrics for Transit Agencies" (June 2010, Version 1.0), which include three specific metrics: emissions per passenger-mile traveled, emissions per vehicle-mile and emissions per revenue vehicle-hour.
**Objective:** The ridership for each transit agency shall grow faster than the rate of growth in population, jobs, and private vehicle registrations within their service area.

**Guideline:** Year-over-year growth in transit ridership by operator.

**Results:** Between FY 2008 and FY 2012, transit ridership decreased by 2.82 percent. More specifically, transit ridership was increasing from 2008 to 2009 and then experienced a sharp decrease in 2009 and 2010. The loss in jobs experienced in 2009 and 2010 directly matches the drop in transit ridership. Starting in 2010, both ridership and total jobs showed increases. Year-over-year growth has improved for both transit operators with MTS ridership increasing by 4.06 percent and NCTD ridership increasing by 4.55 percent between 2011 and 2012.

**Figure 3.2:** Transit Ridership Growth Compared to Jobs, Population, and Vehicle Registration (FY 2008 – FY 2012)
Transit Objectives

The objectives outlined below are designed to provide the quantifiable outcomes for the transit-related goals articulated earlier in this chapter. As with the evaluation of the TDA performance measures included later in this chapter, poor performance by any particular operator or service should not necessarily be seen as a criticism of the service itself, but rather is often a reflection on the need for additional funding sources to expand service frequency, span of service, and service coverage. Services also exhibiting negative trends may use the data to re-evaluate all or part of the service and seek ways to coordinate components to achieve greater efficiencies or to combine services to achieve greater productivity.

The performance of each agency is summarized, while the detailed tables listing the quantitative performance data are included in Appendix L. The data specifically used to evaluate the environmental justice objective is included in Appendix H with the smart growth maps included in Appendix I.

Financial Objective

This objective addresses the farebox recovery goal to ensure fiscally responsible operations. The cost recovery goal and objective provides an evaluation of the financial health of the systems and their continued eligibility for state financial support. The financial objective has been split into two parts: targets emanating from the TDA of California and guidelines set forth in SANDAG policy. The TDA objective has a target rather than a guideline as SANDAG is required by the TDA to establish firm cost-recovery targets for MTS and NCTD. The cost-recovery indicator helps to determine the appropriateness of the fare structure and the ability of the system to generate ridership and revenue. The TDA of the State of California requires that MTS generate a cost recovery of at least 31.9 percent for all services except the Commuter Express Service, which must achieve a 20 percent cost recovery. NCTD must achieve a minimum cost recovery of 18.8 percent for all services. For both MTS and NCTD, a minimum cost recovery of 10 percent must be achieved for American’s with Disabilities Act (ADA) services. Additionally, the SANDAG guideline stems from Board of Directors’ direction to obtain a farebox recovery ratio that is higher than the TDA targets to encourage revenue growth and ridership (SANDAG Policy No. 29). To do this, the SANDAG guideline was developed to track farebox recovery growth in terms of trends above the TDA thresholds.
Objective: For each transit agency to meet or exceed minimum farebox cost-recovery targets or guidelines.

TDA Target: Percentage of operating costs recovered from fare revenue for fixed-route and demand responsive services (31.9 percent MTS, 20 percent MTS Commuter Express, 18.8 percent NCTD, and 10 percent MTS ADA and NCTD ADA).

Results: Both transit agencies met the performance targets for this objective.

SANDAG Guideline: Farebox recovery should exceed the minimum TDA targets and demonstrate a reasonable effort to prevent regression over a three year period.

Results: MTS and NCTD exceeded the minimum TDA requirement for fixed-route and ADA services in FY 2013. MTS achieved a farebox recovery rate of 41.8 percent for fixed-route rail and bus, 46.9 percent for Premium Express services and 12.1 percent for MTS ADA services. NCTD achieved a farebox recovery of 24.9 percent for fixed route and 15.5 percent for ADA services.

Productivity Objective

This objective addresses the goals to operate productive services that also are convenient and appropriate for the markets being served. In order to meet this goal, an objective was developed to measure productivity and to judge whether appropriate levels of service are being provided. Separate guidelines have been established for each service type to reflect differing expectations. A guideline was chosen instead of a target, as this is a SANDAG policy objective, rather than a state or federal requirement. The productivity evaluation includes an evaluation of passengers per revenue-hour and average percentage of seats occupied. Both measures provide a passenger-centric means of evaluating productivity and the attractiveness of a service.\footnote{Transit productivity is impacted by nonproductive time resulting from layovers, which means that load factor may be a less valuable measurement for analyzing specific routes. MTS and NCTD will need to continue to look at other more detailed measurement techniques to determine potential service adjustments at the route or route segment level.}

Calculating a load factor for a transit service has some similarity to a capacity analysis for a roadway. Both roads and transit services are well utilized during peak periods, but when measured over an entire operating day, the capacity utilization is much less. Transit systems reduce capacity or headway during off-peak hours to keep their load factors from falling too low. Roads, as fixed facilities cannot usually reduce capacity in off-peak hours\footnote{In urban areas, transit services that manage an overall daily load factor average of at least 20 percent are doing well. A typical urban arterial, such as Balboa Avenue in San Diego, El Camino Real in North County, and H Street in Chula Vista also have a typical all-day capacity utilization rate by all vehicles of about 20 percent. Sample capacity calculations for these arterial roadways are provided in Appendix G.}.
Objective: To operate transit services that are productive and appropriate for the markets being served.

Guideline 1: Average annual passengers per revenue service-hour by operator (at least 35 passenger boardings/revenue hour for MTS and at least 20 passenger boardings/revenue hour for NCTD).

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

Guideline 2: Average percentage of seats occupied (load factor) at or above the set thresholds included in Appendix L, which vary by service type, zone and time of day (peak/weekday).

Results: In FY 2012 MTS met all of the guidelines for this measure with the exception of the Urban Peak Corridor service (guideline of 45% with performance of 44%). In FY 2013, MTS met all of the guidelines for this measure.

NCTD met all but the Urban Corridor (SPRINTER) guidelines in FY 2012 and FY 2013. This can be attributable to the downturn in the economy. In FY 2013, NCTD did not meet the guideline for Urban Peak Local bus service (guideline of 25% with performance of 23%).

Access Objectives

Transit access can involve issues such as walking distance to a bus stop, the provision of wheelchair lifts or ramps, and the provision of complementary ADA dial-a-ride service. The access objectives identify guidelines on how far people must walk or drive to access transit, as well as linking transit accessibility to the SANDAG smart growth program. Accessibility targets have been established for bus stops as the requirements are federally mandated. In some cases, cities rather than transit operators may be responsible for bus stops. However, this objective is provided here to be consistent with the passenger-centered focus of this Coordinated Plan and to ensure that this indicator is tracked and the appropriate authorities are reminded of their responsibilities.

Walking Distance

Walking distance to a bus stop is one of the major determinants of transit usage. The closer a bus stop is to a person’s point of origin or destination, the more likely they are to choose transit. Several research studies in the United States and Canada have shown that about half of all transit passengers walk less than 750 feet to a bus stop. The graph in Figure 3.3 illustrates the results of this research.

The topography of hills and canyons in San Diego County means that the street network is discontinuous, and geographic barriers often interrupt pedestrian routes. This means it is very difficult to provide good transit coverage, even in many parts of the urban zones; therefore, the
750 feet guideline is unrealistic for this region. The SANDAG guideline reflects a one-half mile distance to a stop. Smart growth will encourage future population growth to occur near transit stops, which should increase the percentage living within the specified distance. The land use change will be a slow process that will occur over many years.

In addition to non-work trips, the proposed guideline recognizes that employment is a major generator of transit trips. Focusing the guideline on employment reinforces the role of the transit system as supporting economic activity and access to jobs.

The results for this indicator are derived through the use of actual walking (or driving) distance from origin to destination utilizing advanced geographic information systems extensions.

**Figure 3.3: Walking Distance Behavior**

![Figure 3.3: Walking Distance Behavior](image)


**Objective 1:** In urban areas, transit and land use development should ensure a comfortable walking distance to transit for residents and jobs.

**Guideline 1:** 80 percent of residents or jobs within one-half mile of a bus stop or rail station in urban areas.

**Results:** Both MTS and NCTD met the guideline for urban residential access, but fell shy of the guideline for urban employment access.
**Objective 2:** Transit and land use development should attempt to ensure that in suburban areas, residents are within a reasonable distance of a park-and-ride facility with access to the transit network, or a bus stop and transit services should be provided to existing or planned smart growth areas.

**Guideline 1:** 80 percent of suburban residents within five miles of a park and ride lot served by transit services

**Results:** Both MTS and NCTD did not meet the guidelines for this objective. The FY 2013 methodology changed to include only transit stations with parking and park and ride lots. In previous years, all transit stops were included.

**Guideline 2:** 70 percent of residents and 75 percent of jobs within one mile of a bus stop or rail station in suburban areas.

**Results:** NCTD met the guideline for suburban employment access, but fell shy of the guideline for suburban residential access. MTS did not meet the guideline for either of the two indicators. This is primarily due to the spatial sprawl of employment sites. It is difficult for MTS to serve all employment sites under current budget constraints.

**Smart Growth**

To provide consistency with the smart growth objectives of the SANDAG RCP, the following performance measure recognizes the critical link between land use and transportation services.

**Objective 3:** Transit service should be designed to support smart growth.

**Guideline:** Transit service should be designed to support the smart growth areas located on the SANDAG Smart Growth Concept Map.

**Results:** 100 percent of the “existing/planned” smart growth areas included on the SANDAG Smart Growth Concept Map (accepted by the Board of Directors on January 27, 2012) are served by the minimum transit characteristics or thresholds.

There are 24 potential smart growth areas in the San Diego region that do not meet the minimum transit service characteristics. Eighteen areas are located in the MTS service area, and six are located in the NCTD service area. Maps illustrating these areas are shown in Appendix I. There is recognition that, while service to the potential smart growth areas is desirable, implementing higher levels of transit service needs to be based on the overall transit demand of each area. As such, MTS and NCTD will continue to review the demand potential in these potential smart growth areas compared with the demand in other areas where service improvements are needed. Given transit agency budget constraints, the ability to implement service improvements will likely be constrained over the next several years.

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6 El Cajon, Grossmont Community College (at State Route 125 and Grossmont College Drive) (EC-3), La Mesa, La Mesa Boulevard (between Spring Street and Fletcher Parkway) (LM-6), La Mesa, El Cajon Boulevard (between 73rd Street and La Mesa Boulevard, extending on La Mesa Boulevard until University Avenue) (LM-9), San Diego Black Mountain Ranch (southwest of intersection of Camino del Sur and Black Mountain Road) (SD-BMR-1), San Diego City Heights, Euclid Avenue (from El Cajon Boulevard to University Avenue) (SD-CH-2), San Diego Otay Mesa (South of Interstate 905 and Oceanview Hills Parkway) (SD-OM-1), San Diego Pacific Highlands Ranch (east of Carmel Valley Road and Del Mar
Lifeline Services

Lifeline services serve as a transportation network, transportation program or service guidelines that aid in transporting transit-dependent and transportation-disadvantaged individuals to essential destinations and daily activities. Lifeline services are typically available to individuals residing in communities that are lightly served by transit. The evaluation of lifeline services helps to ensure that at least some level of service is provided to areas that have been identified as smart growth opportunity areas.

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

Guideline: One return trip provided at least two days per week to destinations from rural villages identified on the Smart Growth Concept Map.

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

Accessible Services

The evaluation of accessible services helps to ensure that accessible services are provided to disabled populations in the region.

Objective 5: Attempt to provide fully accessible bus stops and transit stations.

Guideline: 100 percent of bus stops and transit stations to be fully accessible.

Results: Neither MTS nor NCTD currently meet the guidelines established for this category. The top 100 MTS bus stops are compliant with ADA minimums at the bus stop. NCTD and MTS are looking beyond the accessibility of the stop to look comprehensively at the path of travel to the stop; however, the identified deficiencies point to the need for additional funding in this category. MTS conducted a comprehensive inventory of its busiest bus stops and is developing plans to improve accessibility at and near these locations pending availability of funding. NCTD will conduct a Bus Stop Rationalization Study in FY 2015 that will program the construction of ADA compliant stops throughout the service area.

Heights Road) (SD-PHR-1), San Diego Torrey Highlands (North side of State Route 56 and Camino del Sur) (SD-THD-1), San Diego Uptown – San Diego Avenue (from Old Town to Washington Street and India Street from Washington Street to Palm Avenue) (SD-UP-3), Santee, Cuayamaca Street (between Mission Gorge Road and Prospect Avenue) (ST-2), Santee, Magnolia Avenue and Mast Boulevard (ST-3), Santee- Mission Gorge Road and West Hills Parkway (ST-4), County of San Diego- Lakeside-Bostonia (CN-7), County of San Diego, Jamacha Boulevard (at Sweetwater Springs) (CN-10).

7 Carlsbad, Plaza Camino Real (at State Route 78 and El Camino Real Carlsbad) (CB-2), Carlsbad, Quarry Creek Area (at Marron Road and north of Tamarack Avenue) (CB-3), Escondido, Citricado Parkway and Centre City Parkway (ES-6), San Marcos, Rancho Santa Fe Road (between Mission Road/South Santa Fe Road and San Marcos Boulevard) (SM-7), San Marcos- San Elijo Hills (at San Elijo Road and Elfin Forest Road) (SM-8), Vista, East Vista Way/Foothill (VS-6).
Convenience Objectives

Five of the regional transit goals relate to developing a transit system that is convenient for users and potential users. The goals in this section all relate to convenience, but note that different levels of service are appropriate for different markets or zones.

The span of service guidelines define the times that transit service will be provided. For the Urban Zone, the objective is to ensure that service is convenient and can accommodate travel during most hours of the day. In the suburban zone, the emphasis on providing excellent commuter services in major corridors is backed by a guideline to provide a limited network of lifeline services. In the rural areas, the policy objectives and guidelines only contemplate lifeline levels of service. The MTS and NCTD Boards of Directors also may decide to provide higher levels of service in specific areas where there is higher ridership or special market conditions.

The frequency of service also influences people’s modal choice. The urban core is the area that requires and can support a high-level of frequency that will enable passengers to travel spontaneously. Experience in San Diego and elsewhere shows that better headways almost always result in more riders.

The minimum regional service headway goals are set at 20 minutes for bus, 20 minutes for corridor rail, and 30 minutes for regional rail (COASTER), consistent with the vision of the 2050 RTP. With the additional investment described in the 2050 RTP, the headways will be enhanced in future plans with the goal of bringing bus services in key travel corridors up to the service goal of 15 minutes or better for all-day service. The current goals recognize the high cost of reducing headways below 30 minutes and take into account current funding or facility limitations.

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

**Guideline:** Percentage of stops that have transit service within the specified timeframes for each zone and day of week (weekday/Saturday/Sunday) that are at or above the thresholds included in Appendix L.

**Results:** Both agencies did not meet weekday guidelines for this objective. It is recognized, however, that limited financial resources have an impact on reduced service spans at “shoulder” time periods where service is less efficient.

**Objective 2:** To provide frequency appropriate for spontaneous travel on major corridors and convenient travel to all parts of the urban core.

**Guideline:** Minimum headways expressed in minutes that are at or below the thresholds included in Appendix L, which vary by service type, zone, and time of day (peak/off peak).

**Results:** MTS met the guidelines for community bus services. Peak regional bus, urban off-peak corridor services, urban peak local bus and rural services provided by MTS did not meet the minimum headway guidelines. NCTD met the guidelines for regional rail services, but did not meet the guidelines for corridor or local bus services.
Reliability and Speed Objectives

Reliability and speed are very important to existing and prospective transit users. As such the transit service goals recognize the importance of reliability and maintaining or improving travel times. The reliability objective provides a link between the published timetables (promised service) and actual service operated on the road.\(^8\)

The guideline for local and community bus service was lowered to 80 percent in the 2008-2012 Coordinated Plan from 95 percent. This was done to reflect experience from other transit agencies that have shown that the previous manual schedule adherence-checking often overstates reliability, and to distinguish local and community buses from regional and corridor cars where greater reliability is expected due to use of reserved rights-of-way and priority systems. In future years, the guidelines can be adjusted as more data is received and analyzed. The evaluation of completed trips also is included under the first objective since it is important to evaluate whether the overall transit routes are adequately serving the public. While on-time performance helps evaluate scheduling or congestion issues, this indicator quantifies maintenance or driver issues for vehicles that are taken out of service.

The guidelines for ADA paratransit meet federal rules that establish guidelines for ADA paratransit service. The federal law does not specify performance levels for missed trips or schedule performance, but does require a high level of service be provided. Both MTS Access and NCTD Lift services consider a trip to be on time if the passenger is picked up within a 20 minute window starting at the scheduled pickup time.

The second objective is to ensure that transit services do not lose speed over the course of the evaluation period. Slower services cost more in operating expenses and are less attractive to passengers. It becomes increasingly difficult to maintain service speed in the face of growing traffic congestion; however, implementation of transit priority measures can mitigate this problem. Deficiencies in this area can point to the need for additional funding for signal priority systems which can be developed through partnerships between Caltrans, SANDAG, various cities, transit agencies, developers, or other organizations.

**Objective 1:** To operate transit services that are reliable, offer competitive travel times, and adhere to published timetables or service intervals.

**Guideline 1:** Percentage of trips on time at departure, arrivals, and en route timing points.

**Results:** MTS did not meet the 80 percent on time guidelines for FY 2012 and FY 2013. NCTD met the 80 percent on-time guideline for its rail services (regional and corridor) but did not meet the guideline for local bus service for both FY 2012 and FY 2013.

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\(^8\) Service reliability is a critical factor that influences people’s modal choice. The Automatic Vehicle Location (AVL) system now being installed on the transit fleet will provide useful data for evaluating the schedule reliability of the system. These guidelines are consistent with the capabilities of the electronic data reporting that will be feasible with AVL.
Guideline 2:  97.5 percent of trips completed.

Results:  MTS and NCTD met Guideline 2 for this objective for the categories with available data.

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

Results:  MTS exceeded the guideline for this objective in FY 2012 and FY 2013. NCTD fell shy of the guideline by 2 percent (guideline of 94% with performance of 92%) for both fiscal years.

Objective 2:  To maintain or improve existing average speeds on existing transit services within the geographical zones.

Guideline:  Average transit operating speed in each zone.

Results:  Both MTS and NCTD met the speed guidelines in FY 2012. In FY 2013 both agencies matched or were within 1 mile per hour of their FY 2012 average speeds with the exception of MTS rural service, which was 8 miles per hour slower than the FY 2012 average speed for the same service.

Environmental Justice Objective

This objective supports the federal environmental justice, federal Title VI legislation, and RTP equity goals articulated in Chapter 3.

Objective:  To ensure that transit service and amenities provided in minority and low-income census tracts are on average comparable to the level of service and amenities provided in nonminority census tracts.

Target:  Percentage of minority and low-income census tracts with transit service must not be disparately impacted and disproportionately burdened when compared to the average level of service and amenities provided in nonminority census tracts.

Results:  An updated Title VI evaluation was conducted for FY 2013 and found overall, the Low-Income and Minority Census Tracts (MTS and NCTD) were shown to have faster service, lower fares, and similar transfers to the top three major destinations in each service area. However, the Low-Income and Minority Census Tracts were generally shown to have a higher cost per mile based on the close proximity of these tracts to the major destinations. The results of this analysis are included in Appendix H.

Comfort Objective

This objective addresses the goal to provide appropriate service for the markets being served. One of the least welcomed aspects of public transit is the need to stand on board crowded, moving buses or trains. People are often uncomfortable in an environment where they must stand shoulder to shoulder with complete strangers. As a result, most transit systems have policies that define the maximum capacity of bus and rail vehicles. MTS Board Policy No. 42 defines the standard for load
capacity as 150 percent and allows up to 20 percent of trips to exceed that. It is expected during peak times that all transit riders will not be guaranteed a seat.

**Objective:** Occupancy on board vehicles should be appropriate for the distance, speed, fare, and type of service being operated.

**Guideline 1:** Guideline is under development.

**Guideline 2:** Guideline is under development.

## Specialized Transportation

In the past, SANDAG had a very limited role in specialized transportation. SANDAG coordinated the local process for awarding FTA Section 5310 money for elderly and disabled transportation. SANDAG also previously acted as the CTSA for San Diego County, overseeing the Specialized Transportation Referral and Information Database website and coordinated training programs for specialized transportation operators. As a result of SAFETEA-LU, SANDAG was given the responsibility to develop a Coordinated Plan and administer grant program funding to agencies providing specialized transportation services. Additionally, the TransNet Extension Ordinance contained a provision for a Senior Transportation Mini-Grant program that also has increased the SANDAG role in specialized transportation services in the region.

This requirement for a Coordinated Plan was continued in MAP-21. Significant changes in MAP-21 include the end of both Job Access and Reverse Commute (JARC) and New Freedom as distinct programs. Both survive as eligible activities. JARC-type projects remain as eligible activities under the rural (Section 5311) and urban (Section 5307) formula funding programs. New Freedom-type projects are now an allowable expense under Section 5310. The legislation allows Metropolitan Planning Organizations to take over the administrative responsibility for the 5310 program as the Designated Recipient. Previously the Caltrans Division of Mass Transportation was the designated recipient for this program. SANDAG was granted designated recipient responsibility for the 5310 program under MAP-21 in May 2014. The objectives and program measures for the new 5310 program will be included in the next Coordinated Plan update. It will take a few years before all remaining funding under the SAFETEA-LU, JARC and New Freedom programs are fully spent, and therefore this Coordinated Plan and likely the next update will continue to include a discussion of these programs.

### Specialized Transportation Objectives

The objectives outlined below are designed to provide the quantifiable outcomes for each of the goals related to specialized transportation from Section 3.2. As required by the Government Performance Results Act, the federal government has identified five indicators for measuring...
relevant outputs, service levels, and outcomes for each of its programs. It is the responsibility of the FTA to collect and report this data at the program level, and is not used to assess individual grants, however to remain consistent SANDAG has adopted these indicators for the purposes of the Coordinated Plan. Because of the close parallels of the goals of the Senior Mini-Grant program to these federal specialized transportation programs, indicators for projects funded through the Senior Mini-Grant program are included in this section with the detailed results included in Appendix L. Because of the wide array of projects funded through these specialized transportation grant programs with differing service parameters and associated costs, these indicators should not be used to analyze or evaluate the performance of individual projects or the grant programs.

**New Freedom Program Measures**

The New Freedom program is a federal program intended to improve mobility choices for persons with disabilities. The three measures established by the FTA for the New Freedom Program are:

**Measure 1:** Increases or enhancements related to geographic coverage, service quality, and/or service times for transportation services for persons with disabilities in the current year, to be measured by:

- Geographic area in square miles where services are being provided under the New Freedom program
- Enhanced service quality for disabled transportation
- Enhanced frequency of service for disabled transportation

**Results:** The geographic coverage including operating projects in 83 ZIP codes and mobility management services in 120 ZIP codes. All projects to date have represented new projects and therefore there have not been any projects falling under the enhanced service quality or enhanced frequency categories.

**Measure 2:** Additions or changes to environmental infrastructure, technology, and vehicles that impact the availability of transportation services for the disabled in the current year, to be measured by:

- Improved infrastructure and technologies
- Improved vehicles

**Results:** No accessible vehicles were purchased with New Freedom funds in FY 2012 and FY 2013. No improved infrastructure or technology projects were funded.

**Objective 3:** Actual or estimated number of rides (as measured by one-way trips) provided for individuals with disabilities as a result of the New Freedom projects

**Results:** The number of one-way trips provided under the New Freedom program was 19,288 in FY 2012 and 35,302 in FY 2013. Additionally, for mobility management projects, 25,435 units of service were provided in FY 2012 and 27,410 in FY 2013.
**JARC Program Measures**

JARC is a federal program intended to improve mobility choices for employment related travel for reverse commuters and persons of limited means. The two measures established by the FTA for the JARC Program are:

- **Measure 1:** The actual or estimated number of jobs that can be accessed as a result of geographic or temporal coverage of JARC projects implemented.
  - **Results:** The estimated number of jobs that can be accessed as a result of JARC projects in FY 2013 were 1,356,425.

- **Measure 2:** The actual or estimated number of rides (as measured by one-way trips):
  - **Results:** The number of one-way trips provided by JARC projects was 1,073,414 trips in FY 2012 and 7,441,515 in FY 2013. Additionally, mobility management projects delivered 557 units of service in FY 2012 and 945 units of service in FY 2013.

**Senior Mini-Grant Program Measures**

The Senior Mini-Grant program is a local program funded through the TransNet Extension Ordinance. SANDAG has included the requirement that all projects funded through the Senior Mini-Grant program be derived from the Coordinated Plan, similar to the SAFETEA-LU federal requirements for the JARC and New Freedom programs. The program and evaluation criteria were developed with stakeholder input and through this process, a performance indicator was established to measure the performance of projects funded under this program. The measure established for operational projects funded by the Senior Mini-Grant program is:

- **Measure 1:** The actual or estimated number of rides (as measured by one-way trips):
  - **Results:** The number of one-way trips provided by Senior Mini-Grant projects was 80,033 trips in FY 2012 and 97,507 trips in FY 2013.

- **Objective 1:** To evaluate the cost-effectiveness of a project, to be measured by:
  - Operating cost in dollars per passenger
  - **Results:** The operating cost in dollars per passenger was $16.92 in FY 2012 and $14.90 in FY 2013.

**Specialized Transportation Project Monitoring and Reporting**

With the responsibility of administering the local and federal specialized transportation programs, SANDAG has developed a consolidated approach to monitoring the projects funded through these programs. This monitoring program is specifically laid out in the Program Management Plan, which is available on the SANDAG website at [http://www.sandag.org/PMP](http://www.sandag.org/PMP). SANDAG developed a Monitoring Checklist that assesses the project’s compliance with the terms of the grant agreement.
As part of the Monitoring Checklist, SANDAG measures that grantee’s progress towards project delivery by measuring the cost per unlinked one way passenger trip (or other measurable unit of service) and comparing it with the cost per unit original proposed by the grantee in their grant application. The Monitoring Checklist is completed during site visits performed for all grantees at regular intervals.

SANDAG also monitors the projects on an ongoing basis through the progress reports that are required to be submitted with each invoice packet. SANDAG uses the information from these report forms and associated data along with information from site-visits to report on the performance of the grantees and the programs as a whole to stakeholders quarterly. The performance report includes a quantitative analysis related to the level of service provided and the cost per unit, in comparison to the grantee’s proposal and an analysis related to the rate the grantee is drawing down on funding compared to the project term to assess whether an extension may be requested. This performance report is presented to the Independent Taxpayers Oversight Committee and Transportation Committee quarterly and to the Social Services Transportation Advisory Council biannually.

Maps of the JARC, New Freedom, and Senior Mini-Grant projects that received funding in 2011 are shown in Figures 3.4, 3.5, and 3.6. These figures only include service and route-based projects; other projects such as travel training and infrastructural improvements are not displayed on the maps.
Specialized Transportation Providers Funded through the Job Access and Reverse Commute Grant Program (2012)
Figure 3.5: New Freedom

Specialized Transportation Providers Funded Through the New Freedom Grant Program (2012)
Figure 3.6: Senior Mini-Grant Program

Specialized Transportation Providers Funded Through the TransNet Senior Mini-Grant Program (2012)
The major initiative of SANDAG to improve transportation coordination among social service transportation providers has been the creation and funding of the CTSA. In 2006, SANDAG designated Full Access and Coordinated Transportation (FACT) to be the CTSA for San Diego County.

The role of the CTSA is to promote the consolidation of specialized transportation, through functions identified in the Social Service Transportation Improvement Act, such as centralized dispatching, combined purchasing of necessary equipment and supplies, centralized maintenance, centralized administration to eliminate duplicative administrative tasks, and consolidation of existing sources of funding. This consolidation can result in more efficient and effective use of resources throughout the region.

The core mission of FACT is to assist San Diego County residents with barriers to mobility to achieve independence through coordination of transportation services.

The following objective was set by SANDAG to develop and encourage coordinated transportation.

**Objective 1:** To effectively advance coordinated access to the full spectrum of community transportation options for populations in need (seniors, persons with disabilities, and persons of limited means) through mechanisms such as mobility management, data tracking for unmet needs, vehicle brokerage, coordinated service, etc., to be measured by:
- Increase in the number of social service programs including, coordinated transportation as an integrated component.

**Objective 2:** To fulfill the scheduled tasks and activities as identified in the CTSA contract between SANDAG and FACT (Contract No. 5000644) as follows:
- Maintain an information and referral website
- Provide information and referral assistance on transportation for seniors, persons with disabilities, and other transportation disadvantaged populations
- Organize trainings for the community
- Maintain an active (minimum four times per year) advisory council of the CTSA (CAM) that can serve as a forum for local health and social service transportation agencies to coordinate and disseminate information on specialized transportation
- Develop an annually updated strategic business plan
- Maintain an inventory of existing resources
- Coordinate surveys
- Maintain a CTSA mailing list
- Provide newsletters, brochures, and other information materials
- Report on actions and activities of the CTSA
Objective 2 (continued):

- Ensure that at least 50 percent of the FACT Board of Directors is comprised of officials elected to municipal or county positions in San Diego County, including one member who is a sitting member of the SANDAG Transportation Committee
- Work with SANDAG on the development and updating of the Coordinated Plan
- Conduct quarterly workshops and safety roundtables
- Assist with the federal capital grant process
- Maintain a supplemental transportation programs best practice library
- Give community presentations and technical assistance
- Identify partnerships between public and private services
- Facilitate combined purchasing to achieve cost savings among providers of social service transportation
- Provide consolidated driver training for social service transportation providers
- Coordinate centralized maintenance of vehicles
- Provide transit travel training
- Conduct ADA paratransit/alternative transportation training
- Provide centralized dispatch of vehicles for social service transportation providers
- Develop an administrative model that would eliminate numerous duplicative and costly administrative burdens
- Identify and consolidate existing sources of funding for social service transportation service to provide a more effective and cost efficient use of scarce resources
- Ensure that local elected officials are involved in developing local actions necessary for the success of the CTSA
- Participate in regional disaster preparedness planning for coordinated emergency evacuation
- Identify target area for deployment outside the pilot project area

3.4 TDA Productivity Improvement Program and Performance Monitoring

Another component of the transit monitoring process is the TDA productivity improvement program and performance audit, which is included in the Coordinated Plan. This program is updated and evaluated annually so that SANDAG may distribute state TDA monies to the transit agencies. The productivity improvement program ensures that state and local requirements are met and that these programs improve the effectiveness and efficiency of the regional transportation system.

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9 The TDA provides funding for the region’s public transit operators and for nonmotorized transportation projects and as the Regional Transportation Planning Agency, SANDAG administers the TDA funds.
Pursuant to California Public Utilities Code Section 99244, an operator can be allocated no more in FY 2013 than it was allocated in FY 2012 unless SANDAG determines that the operator made a reasonable effort to implement the productivity improvement recommendations adopted by the Board of Directors for the current fiscal year. This reasonable effort is developed through the evaluation of three-year trend data and through a determination of whether or not those trends are positive.

The Productivity Improvement Program includes all of the performance measures explicitly stated in the state TDA Manual Section 99246(d). Additionally, SANDAG tracks multiyear trend analysis since it is recognized that steps taken by the transit agencies to improve system performance often take several years to be fully realized. The Productivity Improvement Program for FY 2014 included the evaluation of the following TDA performance measures over a three-year (13 quarter) period; Quarter 2 FY 2011 to Quarter 2 FY 2014:

- Operating Cost Per Passenger (adjusted for annual inflation) – measures cost-effectiveness
- Operating Cost Per Revenue Hour (adjusted for annual inflation) – measures cost-efficiency
- Passengers Per Revenue Hour – measures service productivity
- Passengers Per Revenue Mile – measures service productivity
- Revenue Hours Per Employee – measures labor productivity
- Farebox Recovery Ratio – measures service cost-efficiency

These performance indicators are measured separately for fixed-route (MTS Trolley, MTS Bus, NCTD SPRINTER, NCTD COASTER, and NCTD BREEZE Bus), demand-based services (NCTD FLEX), and ADA paratransit services (MTS ADA and NCTD ADA).

The indicators help determine if the agency is obtaining the desired results from the system and if overall performance is improving based on updated regional strategies or service operation plans. Also, these indicators help the transit agencies determine where improvements can be made. These improvements can be incorporated into each operator’s Service Implementation Plan, which are included in the Coordinated Public Transit – Human Services Transportation Plan prepared by SANDAG.

Performance trends were evaluated in FY 2014 to determine whether the transit agencies improved their performance in light of external circumstances (e.g., fuel prices and reduced state funding levels for transit). To facilitate a greater understanding of each individual service (MTS Bus, MTS Paratransit, MTS Trolley, NCTD Breeze, NCTD COASTER, NCTD SPRINTER, and NCTD Paratransit), a composite index of the six TDA performance measures is included in the Productivity Improvement Program to help determine overall trends.

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10 Based on the TDA Manual Sections 6633.2 and 6633.5, this measure includes the evaluation of the last four quarters of available data (Quarter 2 of FY 2012 through Quarter 2 of FY 2013).
Appendix J includes the composite evaluation of each service from Quarter 2 of FY 2011 to Quarter 2 of FY 2014. The overall composite charts are followed by charts that specifically illustrate the percent change through the reporting period as discussed below.

MTS FY 2014 Performance

The results of the MTS performance trend analysis in FY 2014 indicate that:

- MTS Trolley performance improved by seven percent based on the Quarter 2 FY 2011 to Quarter 2 FY 2014 analysis. The main reason for this increase is a 31 percent increase in ridership since Quarter 2 FY 2011. For this reason, Quarter 2 FY 2014 shows increases in the productivity measures of Passengers per Revenue Hour and Revenue Mile. The Trolley farebox recovery rate remained stable, resulting in a recent four-quarter average of 54 percent. This farebox recovery is well above the 36 percent system average.

- MTS Bus overall performance improved by three percent based on the three-year analysis from Quarter 2 FY 2011 to Quarter 2 FY 2014. This is due to the fact that there was a 7.7 percent increase in ridership over the three years and a slight increase in the performance measures of Passengers per Revenue Hour and Revenue Mile.

- MTS ADA overall performance improved by four percent over the past analysis period. While Revenue Miles and Revenue Hours increased slightly since Quarter 2 FY 2013, so did ridership (7.6%). There was a small gain in operating cost for this service, however due to simultaneous increases in ridership and revenue hours there was an overall decrease in operating costs per passenger and per revenue hour since Quarter 2 FY 2013. The farebox recovery ratio decreased by 1.4 percent over the three-year analysis period and stands at 13.1 percent for Quarter 2 of FY 2014.

NCTD FY 2014 Performance

The results of the NCTD performance trend analysis in FY 2014 indicate that:

- NCTD COASTER overall performance improved by eight percent over the three-year analysis period. Since Quarter 2 FY 2013, the COASTER experienced an increase in total number of boardings. COASTER proved cost effective and experienced a decrease in Operating Cost per Passenger and in Operating Cost per Revenue Hour since Quarter 2 FY 2013. The COASTER demonstrated a positive performance in both productivity measures, Passenger per Revenue Hour and Passengers per Revenue Mile. The farebox recovery ratio increased by 0.5 percent since Quarter 2 FY 2011, ending the analysis period at 35.8 percent.

- NCTD SPRINTER performance declined by three percent over the last 13 quarters, which is an improvement from the five percent decline from last quarter’s analysis. The SPRINTER performance decline was primarily due to the shutdown in service that occurred on March 9, 2013 due to the trains’ accelerated brake rotor wear. Since the last quarter, SPRINTER has seen improvements in Passengers per Revenue Hour. Currently, the farebox recovery ratio is 18.41 percent, which is slightly below the TDA required minimum of 18.8 percent for fixed route services. The farebox recovery ratio has increased by over 10 percent from the ratio that was attained while SPRINTER service was unavailable during 2013.
NCTD BREEZE overall improved by four percent from Quarter 2 FY 2011 to Quarter 2 FY 2014. Since the last quarter, there has been a decrease in revenue hours and operating costs, but a small increase in ridership. Since Quarter 2 FY 2013, BREEZE service saw little change in Operating Costs per Passenger and per Revenue Hour. Labor productivity improved by 8.7 percent from the Quarter 2 FY 2011 to the Quarter 2 FY 2014. BREEZE farebox recovery has improved by 2.04 percent over the last three years, ending at 21.1 percent in Quarter 2 FY 2014.

NCTD ADA service improved by 13 percent over the three-year analysis period. During this analysis period, ridership increased by 27.2 percent. Additionally, improvements were experienced in Operating Cost per Passengers and the Productivity measurements. The farebox recovery ratio for the most recent quarter was 13.2 percent.

### 3.5 TDA Performance Audit Recommendations

In addition to the three-year performance monitoring associated with the annual TDA claim, the triennial performance audit included the development of improvement recommendations for the transit agencies. The most recent performance audit completed in July 2013 included recommendations on possible strategies to improve efficiency and effectiveness for both transit operators. These recommendations and the associated MTS and NCTD action plans to implement them (from Form B of the 2014 TDA Claim) were updated by MTS and NCTD and are included in Appendix J.

### 3.6 Technical Advancements and Automation

As outlined in this chapter, the Coordinated Plan provides a comprehensive performance analysis of transit service from the regional and passenger perspectives. However, as more detailed data becomes available from new technologies, this evaluation can be further expanded in future years. Automated and consistent data collection is critical to ensuring that performance is tracked over the five-year timeframe discussed in this chapter, including the three years outlined in the TDA section. The following section discusses the status of technical advancements and improvements to the data collection process expected over the next several years.

#### Transit System

SANDAG, MTS, and NCTD rely on numerous tools for performance monitoring. The Regional Transit Management System (RTMS) is a sophisticated management tool for providing real-time performance monitoring and reporting. The RTMS relies on data from AVL technology for real-time vehicle location. AVL data is used for on-time performance monitoring, as well as real-time dispatch control.
The Passenger Counting Program (PCP) provides stop-by-stop boarding and alighting information for every weekday trip, as well as a sample of weekend trips. The PCP relied heavily on manually collected data in the past, but has recently been using data from Automated Passenger Counters (APC) units from a larger subset of the system. To increase the reliability of PCP data and reduce data collection costs, APC units will be purchased on most new vehicles and retrofitted on older buses and rail cars. The long-term goal for the region is to have 100 percent of transit vehicles equipped with APC units.

Figure 3.7 shows the percentage of vehicles (in some cases purchased but not yet deployed) with AVL and APC technology within each fleet, as well as region-wide.

**T-PeMS**

The highway Performance Measurement System (PeMS) program (developed by University of California Berkeley in cooperation with Caltrans) include the completion and integration of arterial (A-PeMS) and transit (T-PeMS) modules. As arterial detection is introduced and transit vehicles in the region are outfitted with APC and AVL units, the A-PeMS and T-PeMS modules will serve as the regional platform/vehicle to analyze and assess arterial and transit performance data. These improvements will supplement the SANDAG transit performance monitoring program over the next several years by providing the ability to gather, track, and analyze real-time transit data.
The Coordinated Plan

Chapter 4

An Assessment of Public Transit and Specialized Transportation Needs
CHAPTER 4: AN INVENTORY OF EXISTING PUBLIC TRANSIT AND SPECIALIZED TRANSPORTATION SERVICES

San Diego is served by a network of transit and social service transportation options that respond and react to the growing needs of the region. Services operated by the Metropolitan Transit System (MTS) and the North County Transit District (NCTD) provide fixed-route and Americans with Disabilities Act (ADA) paratransit services for most of the region’s population, focused on the urbanized areas. Where transit and paratransit are either not available or sufficient, or unavailable due to geography or passenger disability to access transit, specialized transportation programs help to fill the gap.

This chapter provides an index of the available public transit and specialized transportation services within the San Diego region. Research is drawn from the services offered by both MTS and the NCTD, along with information gathered from the 2012 Transportation Provider Survey as discussed in Chapter 2.

4.1 Public Transportation Providers

Public transit service in the San Diego region is provided by two agencies: MTS and NCTD. These two agencies operate transit through a variety of directly operated and contracted services, including San Diego Trolley Incorporated, NCTD COASTER commuter train, NCTD SPRINTER light rail, and ADA paratransit service. These operators provide service in the San Diego Association of Governments (SANDAG) area of jurisdiction covering 4,261 square miles and encompassing 18 incorporated cities and the County of San Diego. A more detailed description of the services provided by MTS and NCTD, along with route statistical information, is included in Appendices B and C. Additionally, MTS manages jitney licenses as described in this Chapter.

- ADA Paratransit

The ADA of 1990 prohibits discrimination and establishes equal opportunity and access for persons with disabilities. Transit service providers within San Diego, MTS and NCTD, comply by ADA regulations by making public transportation safe and accessible for all individuals. Among the established design principles that ensure access to transportation, ADA paratransit and dial-a-ride services are mandated for trips beginning and ending within three-quarters of a mile on each side of each regular fixed-route. Paratransit is unique in that it provides a curb-to-curb service for those unable to reach a fixed-route transit stop or station. ADA paratransit cannot exceed more than twice the full fare for regular fixed-route services. Additionally, paratransit allows for the option for a Personal Care Attendant (PCA) to travel at no charge.
MTS ADA Paratransit

MTS Access offers complementary paratransit service for individuals with disabilities who are unable to use fixed-route bus or trolley services. Access, in complying with ADA regulation, provides origin-to-destination service within three-quarters of a mile of an active MTS fixed-route bus route or Trolley station. Passengers must be certified to use MTS Access and the $4.50 fare can be paid with cash or a prepaid MTS Access ticket which are available in books of 10 tickets through the Transit Store. Trips may be scheduled two days in advance up until 5 p.m. the day before travel. In order to efficiently schedule service (and in compliance with ADA requirements), trip times are negotiated up to an hour either way from the requested pick-up time.

NCTD ADA Paratransit

NCTD provides fully accessible fixed route vehicles in their service operations. NCTD contracts directly with an independent firm to operate the LIFT service, which is ADA paratransit providing curb-to-curb service for an ADA certified individual and up to one PCA. Upon vehicle arrival, passengers must pay with either cash or a prepaid ticket book. Trips may be scheduled as early as one to two days in advance. LIFT operates with a one hour (either way) window for scheduling pick up times in order to ensure an efficient demand-responsive trip scheduling system.

4.2 Neighboring Systems

Transit services in adjacent jurisdictions connect to services to and from San Diego County and are therefore recognized in the regional transportation inventory.

Orange County Transportation Authority

The Orange County Transportation Authority (OCTA) is a multimodal transportation agency serving Orange County. The OCTA operates countywide bus and paratransit service; the 91 Express Lanes toll facility, freeway, street and road improvement projects, motorist-aid services, regulation of taxi operations, and administers all of Orange County’s Metrolink rail corridor service.

The OCTA recently prepared its draft Long-Range Transportation Plan (LRTP) that provides the planning foundation for future transportation improvements. The proposed LRTP includes improvements to the transportation network, such as new and widened freeways, tollways, roadways, new and enhanced transit facilities, regional bikeway improvements, and new environmental programs.

Orange County’s current transit system includes fixed-route bus service which is comprised of local routes, express routes, community routes, limited-stop/bus rapid transit routes, rail feeder, and shuttle routes. As of June 2013, the OCTA fixed route bus service has a total of 77 routes. The network is comprised of 40 local routes, 14 community routes, 10 express routes, 12 rail feeder routes, and one limited-stop route. OCTA administers and funds Orange County’s portion of the Metrolink commuter rail system, which covers 68 route miles and sees approximately 16,000 average weekday boardings and approximately 20,000 weekend riders per month (2013 Orange County...
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Congestion Management Program). Orange County’s express buses use the freeway system to provide commuters with faster service over longer distances. There are currently nine express bus routes in place using Interstate 5, Interstate 405, State Route 91, and State Route 57 to connect major employment centers and park-and-ride lots.

The OCTA goals for transit improvements include improving bus connections to Metrolink, developing rapid bus service on major arterials, and improving Metrolink frequency. None of the OCTA routes serve San Diego County; however, OCTA Routes 1 and 191 serve San Clemente Plaza, where passengers can transfer to San Diego NCTD BREEZE Route 395 to Camp Pendleton and Oceanside. Interagency transfers from OCTA to BREEZE buses are available upon request.

Riverside Transit Agency

The Riverside Transit Agency (RTA) is the Consolidated Transportation Services Agency (CTSA) for western Riverside County and is responsible for coordinating transit services throughout the approximate 2,500-square-mile service area. RTA provides both local and regional services throughout the region with 36 fixed routes, eight CommuterLink routes, and Dial-A-Ride services using 266 vehicles. RTA Route 202 provides peak-hour commuter express service from Temecula to Oceanside Transit Center for connections to the NCTD COASTER service. An interagency transfer agreement between NCTD and RTA is currently being negotiated.

Imperial Valley Transit

Imperial Valley Transit (IVT) was created in 1989 as “Imperial County Transit.” It began as a five-route system, with approximately 3,000 passengers a month. Today IVT has 12 routes. The service is operated by LAIDLAW Transit Services, Inc., which is administered by the County Department of Public Works and funded by the Imperial County Transportation Commission, formerly known as the Imperial Valley Association of Governments.

Two Imperial Valley routes (Routes 4 East and 4 West) serve the eastern edge of San Diego County at Ocotillo one day per week via route deviation upon request. However, there are no connecting routes from Ocotillo into the rest of San Diego County. The nearest MTS route serves Borregg Springs.

United States-Mexico International Border

The border crossings between the United States and Mexico are among the busiest in the world. Annually, more than 31 million cars carrying nearly 73 million passengers, 23 million pedestrians, and 1.3 million people arriving by bus have entered California from Mexico, as of 2014. In addition, nearly 1.3 million trucks enter the United States at the commercial crossings. Similar numbers of passengers, pedestrians, and vehicles head south from California to Mexico. To accommodate the border transportation system, a comprehensive effort is underway to improve access to border crossings, improve freight rail service, and coordinate commercial vehicle crossings.

The San Diego region has three international land Ports of Entry (POEs): San Ysidro-Puerta Mexico, Otay Mesa-Mesa de Otay, and Tecate-Tecate, while a fourth is planned at Otay Mesa East, and
construction of a crossborder passenger connection to the Tijuana International Airport is underway.

The San Ysidro POE is known as the busiest land POE in the Western Hemisphere and is currently undergoing a major expansion project. The project is divided in three phases and will expand its capacity by increasing the number of northbound automobile and pedestrian inspection booths and operating bi-directional pedestrian facilities at both east and west ends of the POE, as well as a multimodal transit facilities. Phase One of the project, which included site, design, and initial construction is fully funded, funding for Phase Two is pending, and $226 million for Phase Three is included in the federal omnibus appropriations bill for FY 2014.

The San Ysidro Freight Rail Yard, which is located in the community of San Ysidro at the terminus of the freight line directly north of the United States-Mexico border, east of the Trolley line and East Beyer Boulevard, is a key component of ongoing cross-border goods movement by rail and truck in San Diego. A project to improve the Freight Rail Yard is underway that will replace aging rail infrastructure, expand, and reconfigure the facility’s existing footprint to increase freight capacity and efficiency. The improvements will provide more opportunities for cargo transfer and eliminate some truck trips on freeways in the region. The project is expected to be complete by the end of 2014.

The Otay Mesa-Mesa de Otay Binational Corridor Strategic Plan, adopted by the SANDAG Board of Directors in 2007, proposes to improve crossborder travel in the area, giving high priority to public transportation. As mentioned above, currently, SANDAG and Caltrans, along with a number of key local, state, and federal agencies in the United States and Mexico are executing a plan to self-finance a new border crossing to the east of the existing Otay Mesa POE. In the United States, the future State Route 11 (SR 11) will connect the new border crossing to State Route 905 and State Route 125. In Mexico, the Tijuana-Rosarito 2000 Corridor will connect to the future Otay Mesa East POE (Otay II in Mexico). The new SR 11 and Otay Mesa East POE project will improve the efficient movement of people and goods between the United States and Mexico. Groundbreaking on construction of the project began on December 10, 2013.

The South Bay Bus Rapid Transit (BRT) Project will offer passengers high-quality transit that is fast, frequent, and comfortable. The South Bay BRT will serve the Otay Mesa POE, and major activity centers in the South Bay and Downtown San Diego, and is expected to begin service in late-2015.

The San Diego-Tijuana Airport Cross-Border Facility (CBF) is a project led by a public-private partnership and will enable ticketed airline passengers who pay a toll to travel between Mexico’s Tijuana International Airport (TIJ) and San Diego, California, via an enclosed, elevated pedestrian bridge. The CBF will consist of a main building on the United States side of the border, housing United States Customs and Border Protection inspection facilities along with shops and services to accommodate travelers; an approximately 525-foot pedestrian bridge from the main building on the United States side connecting into TIJ’s passenger terminal on the Mexican side; and parking facilities and areas for car rentals and potentially bus service on the United States side. The CBF is anticipated to open in spring 2015, and is expected to serve 2 million passengers annually, a number that is forecasted to increase to 4.9 million by 2030.
An additional method that facilitates border crossing is offered by the newest of Mexican airlines, Volaris. This airline offers shuttle service from the Santa Fe Depot in San Diego to TIJ in Mexico. A one-way ticket to Tijuana costs $15, and return services also are available from the Tijuana airport to both the San Ysidro border and Downtown San Diego. It should be noted that crossborder transit services require patrons to alight at the border, walk through the inspection area, and reboard their bus once they have cleared United States and Mexican Customs.

The City of Tijuana has identified several transit issues within its jurisdiction, including saturated streets due to growth in vehicular travel, inadequate boarding facilities, an older bus fleet, lack of schedules for transit routes, and inadequate control of transit operations. A restructuring plan is underway to better meet travel demand patterns in Tijuana. In August 2013, the City of Tijuana created the new Integrated Mass Transit System entity to manage their future BRT. The new BRT will consist of two trunk routes, and Trunk Route 1 (formally named Transporte Masivo Tronco Alimentador Corredor Río Tijuana-Puerta México-El Florido) will connect to the east of the San Ysidro-Puerta Mexico POE at the El Florido Industrial Park along the Tijuana River channel. This new mass transit system is partially funded so far, and preliminary works to implement it have begun.

In addition to the major transportation projects that are underway in the San Diego-Baja California border region, two important border-related studies are also in progress that will help shape transportation planning in the border region. The Border Health Equity Transportation Study looks at mobility challenges within San Ysidro with particular emphasis on public health and the unique challenges that face this border community, including traffic congestion, air quality, and access to goods, services, and community facilities. The study is funded through the Caltrans Environmental Justice Transportation Planning Grant program and administered by SANDAG, and is expected to be complete in January 2015. Another study related to transportation in the border region is the Pedestrian and Bicycle Transportation Access Study of the California/Mexico Land POEs, which is being carried out by the Imperial County Transportation Commission, in cooperation with Caltrans, and is funded with a State Planning and Research grant from the California State Department of Transportation. This project seeks to increase connectivity and improve services for both pedestrians and bicyclists who cross any of the existing six international POEs between California and Mexico.

### 4.3 Interregional Systems

#### Amtrak

From FY 2009 to date, Amtrak’s 351-mile Pacific Surfliner corridor has served at least 2.7 million intercity passengers each year. Together with 4.8 million commuter passengers using either Metrolink or COASTER, it is the second busiest passenger rail corridor in the nation. The coastal corridor runs from San Diego to San Luis Obispo through six counties. Stations in San Diego County include Oceanside, Solana Beach, Old Town, and Downtown San Diego. Connections to the transit system occur at each of these stations, including COASTER, Metrolink, Greyhound, local bus routes, the San Diego Trolley, and the SPRINTER light rail route. The Surfliner operates seven days per week, with 22 trains per day. Most service is between San Diego and Los Angeles with
11 roundtrips; 5 of those round trips continue north to Santa Barbara, and 2 round trips continue to San Luis Obispo each day.

Since 1989, SANDAG has been a member of the Los Angeles-San Diego-San Luis Obispo Rail Corridor Agency (LOSSAN), which seeks to increase ridership, revenue, capacity, reliability, and safety on the corridor. It is governed by an 11-member Board of Directors composed of elected officials representing rail owners, operators, and planning agencies along the rail corridor. The LOSSAN Agency is staffed by the OCTA. LOSSAN is working with the state to transfer the Pacific Surfliner operating authority from Caltrans to the LOSSAN Joint Powers Authority.

The Rail2Rail program allows the COASTER passengers to ride six selected Surfliner trains that make all COASTER stops within the limits of their monthly pass or valid fare. This service provides additional options for people traveling in the off-peak periods. Similarly, Amtrak passengers could ride the COASTER if they had a valid Amtrak ticket for service between Oceanside, Solana Beach, and Santa Fe Depot.

**Metrolink**

Metrolink is a regional commuter rail system with seven routes linking communities to employment and activity centers in Riverside, San Bernardino, Orange, Los Angeles, and Ventura Counties.

The Orange County Line and the Inland Empire-Orange County Line both provide service to Oceanside Transit Center linking San Diego County with Los Angeles, Orange, Riverside, and San Bernardino Counties. There is currently not a transfer agreement in place between COASTER and Metrolink. Passengers wishing to transfer between COASTER and Metrolink trains must have a valid ticket for both services. Metrolink tickets may now be purchased at Santa Fe Depot in San Diego and at Solana Beach Station, although the service is only available at Oceanside.

**4.4 Transportation Options**

Alternative public transportation opportunities are available in the San Diego region through existing vanpooling programs. Vanpooling programs involve coordination services such as ride matching, but also can involve operation of regional van or car service. Vanpooling services located in the San Diego region are described in greater detail below.
iCommute

iCommute is the commuter services program for the San Diego region. The program is managed by SANDAG and offers free services to help commuters find alternatives to driving alone. Services include: carpool matching services (for work and school), regional vanpool program, SchoolPool program, “Guaranteed Ride Home” program, Bike-to-Work information, bike lockers throughout the county, transit information, teleworking information for employers, and customized commuting programs for employers.

iCommute’s vanpool program utilizes the Congestion Mitigation and Air Quality (CMAQ) Improvement Program funds to subsidize up to $400 per month of the van lease cost for approved vanpools. Vanpool costs range from approximately $1,000 to $1,400 per month for a variety of van sizes provided by one of two vendors. Commuters initiate and negotiate their own lease agreements. Maintenance and insurance are included in the lease cost, while vanpool users pay for gas and the remainder of the van lease not covered by the subsidy.

iCommute’s regional bike locker network includes 834 locker spaces serving 523 current users. The lockers are currently free to use, with a $25 or $35 security deposit for the key. Funding for management of the program and locker maintenance comes from CMAQ. iCommute has begun retrofit of existing mechanical lockers and purchase of new electronic on-demand units to make the network compatible with the Compass Card, the region’s new smart card standard.

Shared Use Mobility

Privatized car sharing has emerged to meet the needs of passengers who may not own their own car or need additional mobility options outside their regular work commute. Some examples of services offered in San Diego include:

- **car2go** – These two-seater zero-emission vehicles can be picked up and dropped off anywhere within its service area, which includes metro San Diego, Downtown Chula Vista and parts of San Diego State University.

- **Zipcar** – Similar to a rental car, Zipcar allows you to reserve the make and model of your choice. Each vehicle must be returned within its reservation time to its designated parking spot.

- **Lyft/Sidecar/Uber** – Also known as on-demand ridesharing or transportation network companies, riders request a vehicle style of car via smart phone application and a driver will contacts them an their estimated pick-up time. Once picked up, the user can travel to any location within the San Diego region, Uber will take the rider anywhere.

- **Bikeshare** – Similar to car2go, this program will allow users to rent a bicycle and drop it off at any bikeshare docking station. Bikeshare options will be available in the San Diego area in summer 2014 courtesy of DecoBike.
4.5 Other Governmental Agency Transportation

校车

校车服务，由专门的黄色校车提供，是一种可选的服务，由当地学区提供。在圣地亚哥县的42个学区中，30个提供黄色校车服务，而6个只提供特殊需要学生的校车服务。每天大约有54,000名学生和11,700名特殊需要的学生乘坐黄色校车上下学。在没有黄色校车服务的学区，公共交通系统往往是中学和高中的唯一选择。在县内一些地区，学生是公共交通的主要乘客和收入来源，但在时间安排严格的学期内，为服务市场提供公交服务是一个挑战。另外，新建学校在地区的一些偏远地区。由于公共交通资金和联邦法律的限制，创建服务延伸以满足新学校的需求并不总是可行的。

圣地亚哥联合学区是圣地亚哥县最大的单个学区，每天运营大约300辆校车。相比之下，圣地亚哥公交，MTS合同服务，丘拉维斯塔公交和NCTD运营大约578辆高峰时段的公交车。公交系统有更高的乘客率，因为公交车每天使用的时间比校车要长得多，并且能够容纳站立的乘客。比较车队规模可以很好地看出，高峰时段对学校交通的需求量。

剩下的41个学区，在城市和郊区部分的县内运营大约574辆校车，全县共有1,000多辆校车。

圣地亚哥联合学区或圣地亚哥市学区（SDCS）运送大约11,000名学生，占注册人数135,000的8%。被运送的学生，大约3,500名是自愿交换计划，3,600名是磁铁学生。1,800名是特殊教育学生，他们的交通作为个人教育计划的一部分。SDCS必须提供交通，以匹配学生需求，与最适合他们需求的项目相匹配。交通被提供给在邻里学校范围之外的整合计划的合格学生。居住在一个里不到一英里之外的学生不符合乘车条件。

只有距离学校5英里或更多学生有资格乘车。对磁铁学校的，只有一年级学生有资格乘车。对二年级和特殊需要的学生，服务地址到指定的公交车站距离不超过一英里。对于幼儿园学区，公交车站可能在他们家或服务地址到指定的公交车站距离不超过一英里。对于小学学生，公交车站可能在他们家或服务地址到指定的公交车站距离不超过一英里。

近年来预算的削减，促使一些学校选择取消校车服务。这让家长和看护者承担起安全的交通责任。对于有容纳替代方案能力的学校，学区行政和活跃的家长协会已经努力寻找创造性的交通解决方案。

交通提供给有资格的学生，他们参加一个整合项目，超过他们的邻里学校范围。没有学生在离家不到一英里之内从学校乘车是合格的。对于磁铁学校，只有一年级学生有资格乘车。对于二年级和特殊需要的学生，服务地址到指定的公交车站距离不超过一英里。对于小学学生，公交车站可能在他们家或服务地址到指定的公交车站距离不超过一英里。对于小学学生，公交车站可能在他们家或服务地址到指定的公交车站距离不超过一英里。对于磁铁学校，只有一年级学生有资格乘车。对于二年级和特殊需要的学生，服务地址到指定的公交车站距离不超过一英里。对于小学学生，公交车站可能在他们家或服务地址到指定的公交车站距离不超过一英里。对于小学学生，公交车站可能在他们家或服务地址到指定的公交车站距离不超过一英里。
for their students/children. Such low-cost solutions encourage ridesharing and other active transportation alternatives.

**University of California, San Diego Shuttles**

University of California San Diego (UC San Diego) operates an extensive network of nine shuttle routes around the UC San Diego campus and to major offsite landmarks, such as the Old Town Transit Center, the Sorrento Valley COASTER Station, University Towne Center, Hillcrest, and the airport on major holidays. Access to the shuttles is limited to UC San Diego students, faculty, and staff. The services operate various schedules, but some service is available seven days per week and as late as 12:15 a.m. The service is free of charge for currently registered UC San Diego students, faculty, and staff.

The routes are:

- **Academic-year shuttles**
  - Campus Loop Shuttle
  - City Shuttle
  - East Campus/Regents Express Shuttles
  - Holiday Airport Shuttle

- **Year-round shuttles**
  - COASTER Shuttle
  - Hillcrest/Campus Shuttle
  - Mesa Housing Shuttle
  - Sanford Consortium
  - Scripps Institution of Oceanography Shuttle

In addition, UC San Diego has established a special arrangement with both MTS and NCTD allowing students, faculty, and staff to ride free on regular routes that directly serve the UC San Diego east and west campuses (Routes 30, 41, 101, 150, and 921), and the SuperLoop (Routes 201, 202, and 204) and the two routes that serve the UC San Diego medical center in Hillcrest (Routes 3 and 10). In June 2012, SuperLoop Route 204 service was extended east to Judicial Drive providing additional coverage for the University City planning area. UC San Diego passengers may board NCTD Route 101 free with valid UC San Diego identification anywhere along the route between Oceanside and UTC. Figure 4.1 shows these routes.
Figure 4.1: Free-Fare Routes for UC San Diego Students, Faculty, and Staff
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Jimmy State University San Marcos Transportation

The SPRINTER makes a stop on-campus at California State University San Marcos (CSUSM). Once passengers arrive at the CSUSM station, BREEZE Route 347 services CSUSM with a stop at Craven Circle in the heart of the campus. In addition, CSUSM Parking and Commuter Services provide a free lunch-time shuttle from Craven Circle to the Ralph’s shopping center from 11:30 a.m. to 1:30 p.m. on Thursdays only. The shuttle is ADA compliant.

4.6 Private Shuttles and Buses

The San Diego region also has a number of privately funded transportation services that cater to the public or large groups of select users. These services do not necessarily receive public funds, but in some cases, have emerged due to the inability of publicly financed systems to meet demands because of funding, cross boundary issues, or the limited size of the market.

Employer Shuttles

It is understood that employers in the region do offer shuttle services for their employees; however, there is no comprehensive inventory of the services. The shuttles may be operated by company employees or contracted to a transportation provider. The shuttles typically operate from transit centers, such as the Sorrento Valley COASTER station or between remote employee parking and the jobsite. Currently, Qualcomm provides shuttle service to its employees from the Sorrento Valley COASTER station. In future years, additional research should be undertaken to identify the locations of employer shuttles as their presence is indicative of gaps in transit coverage, as well as a confirmation of potential demand.

Old Town Trolley Tourist Shuttle

The Old Town Trolley is a tourist-oriented service that operates themed buses year-round. A two-hour round trip adult ticket costs as low as $32.40. On and off privileges are allowed on each tour, providing visitors the opportunity to explore major landmarks. Major points served are Old Town, Balboa Park, San Diego Harbor, Horton Plaza, Coronado Island, Seaport Village, Little Italy, and the San Diego Zoo. There are currently no joint fares or reciprocity arrangements between the Old Town Trolley and the public transit system.

Greyhound

Greyhound is a nationwide inter-city bus operator. Within San Diego County, Greyhound offers services from Oceanside, Escondido, El Cajon, and San Ysidro to Downtown San Diego. Greyhound services operate express via the freeway system. In the suburbs, Greyhound operates from public transit centers in Oceanside, Escondido, El Cajon, and San Ysidro. However, in Downtown
San Diego, Greyhound uses its own terminal. Greyhound operates seven days per week. Service on board the Oceanside and San Ysidro bus lines is typically offered every hour throughout the day, with some early morning and/or late night trips.

Oceanside to San Diego service is offered six times daily, with an adult cash fare of $7 and a typical scheduled travel time of 50 minutes. Escondido to San Diego is offered two times daily, with an adult cash fare of $17 and a travel time of 40 minutes. El Cajon to San Diego is offered four times daily, with an adult cash fare of $13 and a travel time of 30 minutes. San Ysidro to San Diego is offered 18 times daily, with an adult cash fare of $12 and a travel time of 25 minutes.

**Casino Shuttles**

Indian casinos in the rural areas of San Diego County have become major attractions for residents and visitors, creating a significant demand for bus services. Some casinos, such as Pala, Harrahs, and Viejas are located on existing rural bus routes, while others are not. The casino industry has responded with special bus services for casino visitors and employees. Barona Valley Ranch Resort and Casino, Sycuan Resort and Casino, Valley View Casino, Viejas Casino, Harrah’s Rincon Casino, and Casino Pauma now operate shuttle service to selected areas throughout the county to help fill in the missing links in MTS and NCTD service networks.

Barona Valley Ranch Resort and Casino currently operates approximately 97 express shuttles to and from the North County, East County, South Bay, Mira Mesa, and Kearny Mesa. These shuttles run from 5:15 a.m. until 2:15 a.m. the following morning and operate on weekdays and extended service on Saturday and Sunday only. Passengers must be 18 years or older and display a Club Barona Card to ride the shuttle. With a Club Barona Card, the fare is free.

Sycuan Resort and Casino currently operates daily shuttles to and from El Cajon, Plaza Bonita, Spring Valley, Chula Vista, National City, Mira Mesa, University City, Downtown, and Clairemont, as well as two roundtrip shuttles from the International Border at Tecate Mexico. Sycuan also operates four supplementary evening and bingo routes that service the South Bay; Chula Vista and National City; Mira Mesa, North Park, and Spring Valley; and Northern San Diego County and Kearny Mesa. All passengers must be 18 years or older to ride with a valid photo identification and a Club Sycuan Card. With a Club Sycuan Card the fare is free.

Valley View Casino currently operates the Luxury Line, a fleet of daily shuttles that run to and from the North County Coast, Escondido, Rancho Bernardo, Carmel Mountain, Poway, Rancho Peñasquitos, Mira Mesa, Downtown, National City, and San Ysidro. Valley View also provides service on select days of the week to other areas in the county. On Monday through Friday, shuttles are offered from San Marcos and Vista. On Tuesdays, Wednesdays, Saturdays, and Sundays, additional shuttles service Chula Vista, Mira Mesa, Kearny Mesa, and National City. Also, Valley View offers daily shuttle service to various communities of Riverside, Orange, and Los Angeles Counties. Qualified Valley View guests receive a free Luxury Line Bus Transportation Pass each month in the free casino newsletter. Bus passes can also be picked up from the Players Club. Valley View Casino is also serviced by NCTD BREEZE Route 388, which makes eight trips from the Escondido Transit Center to Valley View Casino every day.
Harrah’s Rincon Casino currently operates complementary motorcoach transportation to and from the casino on Thursdays to Sundays. The Oceanside Line runs four coaches each day with additional stops in Carlsbad, Vista, and San Marcos. The San Diego Line runs five coaches each day from National City with additional stops in Old Town, Clairemont, Mira Mesa, and Rancho Bernardo. Harrah’s Rincon Casino is also serviced by NCTD BREEZE Route 388, which makes eight trips from the Escondido Transit Center to Harrah’s every day.

Casino Pauma currently operates two shuttles on Thursdays to Sundays. On each day, there is a morning shuttle and an afternoon shuttle. The morning shuttle leaves Oceanside at 10:15 a.m. and makes additional stops in Vista and Escondido. The morning shuttle leaves the Casino at 4:30 p.m. The afternoon shuttle leaves Escondido at 5:10 p.m. and makes additional stops in Vista and Oceanside. The afternoon shuttle leaves the Casino at 11:15 p.m. Casino Pauma is also serviced by NCTD BREEZE Route 388, which makes 8 trips from the Escondido Transit Center to Casino Pauma every day.

Viejas Casino currently operates daily shuttles that service El Cajon, Mira Mesa, Kearny Mesa, Rancho Peñasquitos, Imperial Valley, Chula Vista, and National City. If passengers have a V Club card, the fare is free. Viejas Casino is also serviced daily by MTS Route 864.

**Airport Shuttles**

Frequent shuttle service between Downtown San Diego, the Santa Fe Depot train station, and Lindbergh Field is provided by MTS Route 992 (Airport Flyer). In addition, private shuttle operators provide shared-ride shuttle service from all points in San Diego County to the International Airport.

Cloud 9 Shuttle is a privately owned and operated shared-ride taxi service that serves the airport market. Cloud 9 Shuttle also is authorized to provide "shared-ride" transportation throughout San Diego County to San Diego Amtrak, the San Diego Convention Center, and the San Diego Cruise Terminal. All Cloud 9 Shuttle fares are structured by ZIP code.

**Mexicoach**

Mexicoach operates shuttle services from San Ysidro to their downtown terminal in Tijuana, with connections to Rosarito and the industrial parks. The service operates from the San Ysidro transit center and offers convenient connections with the Trolley. The cash fare on Mexicoach is $2 from San Ysidro to the Downtown Tijuana Station or $3 from Tijuana to San Ysidro. The round-trip price is $5. All buses are wheelchair lift-equipped.

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

**Jitney Service**

Jitneys are privately owned vehicles operating on a fixed route for a fare. The City of San Diego gained national attention by legalizing jitney services and deregulated taxis in 1979. By 1984, jitneys flourished in San Diego, with around 100 vehicles operated by 15 companies and ridership peaking
around 15,000 weekly passengers. However, increased regulation along with the declining economy and a reduced military presence in the late 1980s reduced the viability of jitney service to short-haul trips in the San Ysidro area. Jitney permits are provided by MTS, while the Sheriff’s Department licenses jitney drivers. Each jitney route is approved by MTS along with the fare, which currently ranges between $1.50 and $2.25 per passenger.

There are currently nine licensed jitney companies, with 10 vehicles serving the greater San Ysidro/Otay Mesa area. Space for the jitney stand has been assigned to the curb (240 feet) near the San Ysidro Intermodal Transit Center on San Ysidro Boulevard across from the Trolley line. The main purpose of the jitneys in the San Ysidro community is to provide transportation for the swap meets, as well as area businesses. Operations are based on a fixed route. Additionally, jitneys may stop at any existing bus route along the approved jitney route to pick up or drop off passengers. When the swap meet is closed, the jitneys offer service between the transit center and Palm Avenue.

Emergency and Non-Emergency Transportation

A number of agencies provide transportation to hospitals in the San Diego region. The hospitals may fulfill the demand themselves, providing either emergency ambulances and/or shuttle services to its campuses and to its immediate neighbors. These include shuttles between remote parking areas and hospital sites for employees (e.g., Palomar Hospital District) and shuttles for staff and patients (e.g., UC San Diego Hillcrest and Veteran’s Hospital).

The private/public market also has facilitated this demand. The following is a limited list of medical-related transportation providers, both emergency and nonemergency, in the San Diego region:

- Emergency
  - American Medical Response
  - Balboa Ambulance
  - Care Medical
  - Critical Air Medicine
  - East County Fire Department
  - Pacific Ambulance
  - San Diego Medical Services
  - Schaeffer Ambulance

- Non-Emergency
  - American Medical Response
  - Care-A-Van
  - DVA Transit
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AND SPECIALIZED TRANSPORTATION SERVICES

- No Vacancy
- San Diego Medical Services
- Sharp Healthcare Transportation
- TLC Medical Transport
- Tri-City Medical Center
- VA Patient Travel

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

**Private Paratransit Service Providers**

Paratransit provides transportation service for seniors and persons with disabilities. Transportation is contracted out through various taxi companies, who typically charge a fee per mile with no loading fee. Wheelchair-accessible vehicles are available and scheduling is suggested up to one week in advance.

### 4.7 Specialized Transportation Providers

In cases where individuals are not able to access or have needs that meet beyond what public transit (both fixed-route and demand-based services) offers, a breadth of specialized transportation providers operate to serve the needs of older adults, individuals with disabilities, and low-income individuals, among other (generally considered) transportation disadvantaged populations. This extension of transportation effectively expands the MTS and NCTD paratransit services. While all transit-operated services provide compliant ADA services, the service may not meet an individual’s preference (travel time, for example) or means. Specialized transportation provided by either private, for-profit or nonprofit organizations, in some cases, may have more flexible service parameters that more appropriately meet their client’s preferred service needs. Additionally, programs that are subsidized through grant-funding are able to offer more cost-effective services.

**Specialized Transportation Providers Survey**

While past Coordinated Plan outreach efforts have focused more specifically on the individual passenger’s needs, the 2012-2016 edition of the plan, in conjunction with past passenger analysis, involved an extensive scoping of the available transportation providers within the region. By better understanding the available services, the needs and existing gaps/redundancy in social service agency transportation service are more effectively highlighted. In order for this to be assessed, SANDAG surveyed each agency to describe the service area (by city boundaries, ZIP codes, or within a certain radius of an area), population served, service type, among other more specific questions relating to specialized transportation services.

In January of 2012, SANDAG conducted a phone and internet survey to update the inventory of available services within the region. Over 120 transportation providers were contacted from the
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AND SPECIALIZED TRANSPORTATION SERVICES

CTSA transportation provider database. Of the 122 agencies\(^1\) that were contacted, 11 of the
identified providers had cancelled the respective program’s transportation service, giving the survey
a sample size of 111. Of the 111 active providers, 65 provided response to the SANDAG survey and
questionnaire efforts. Within the survey, participants were asked about the service area of their
operations, enrollment or program requirements, hours and days of operation, fare requirements,
and vehicle types. The results of the survey are included in Appendix D. Though this sample is not a
complete representation of all the transportation providers in the region, the survey does include
research gathered from a bulk of the primary providers in San Diego. Due to the large volume of
responses gathered and conclusive analysis provided, the survey was not repeated for the 2014-2018
dition of the Coordinated Plan.

While this 2012 survey exists as a sample of our San Diego region, a few key assumptions can be
drawn from the analysis. Based on the feedback received from the survey efforts, the results may be
summarized by the following:\(^2\):

**Location of Maximum Available Service is Geographically Clustered**

According to the surveyed providers, maximum available service of specialized transportation
services is found in San Marcos, Escondido, Poway, Santee, El Cajon, La Mesa, and Lemon Grove. As
shown in Figure 5.2, these areas provide over 20 mobility options in a compact region, leaving the
rural east and urban south with little to no coverage.

### Table 4.1: Populations Served by Specialized Transportation within San Diego

4. Please select the population(s) that you serve
   (select all that apply).

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Response Percent</th>
<th>Response Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seniors (Age 60+)</td>
<td>62%</td>
<td>41</td>
</tr>
<tr>
<td>Disabled - Non-Senior</td>
<td>48%</td>
<td>24</td>
</tr>
<tr>
<td>Disabled - Seniors (Age 60+)</td>
<td>70%</td>
<td>35</td>
</tr>
<tr>
<td>Low-Income Persons</td>
<td>54%</td>
<td>27</td>
</tr>
<tr>
<td>Student/Youth</td>
<td>30%</td>
<td>15</td>
</tr>
</tbody>
</table>

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\(^1\) While SANDAG records have 122 agencies on file that were contacted, organizations and agencies were encouraged to
invite other transportation-related providers to participate in the survey and outreach efforts.

\(^2\) While all survey responses were utilized in the analysis of this study, not all responses provided sufficient enough
information for mapping. The findings from the survey may not be reflected in the graphic representation.
Seniors (Age 60 plus)

The majority of specialized transportation services cater to the senior populations. Table 4.1 indicates that the majority of surveyed providers offer transportation to individuals aged 60 and over. Eighty-two percent of respondents provide transportation to seniors, compared to low-income and student/youth programs at 54 percent and 30 percent respectively. Table 4.1 provides more information on the populations served in San Diego. Of the providers, a large portion of this service is in North County San Diego. Of those organizations that provide transportation to seniors, only eight providers throughout the entire County specialize in transportation for individuals age 85 and older. Figure 4.4 and 4.5 spatially demonstrate the density of providers that specifically identified themselves as serving individuals age 60 and over, and age 85 and over, respectively.
Figure 4.2: Survey Sample of Available Specialized Transportation Providers throughout San Diego County*

Survey Sample of Available Specialized Transportation Providers throughout San Diego County*

*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the providers located in San Diego and does not account for all available services.
Figure 4.3: Survey Sample of Available Senior Specialized Transportation Providers throughout San Diego County

*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
Figure 4.4: Survey Sample of Available Senior (60 Plus) Specialized Transportation Providers throughout San Diego County

Survey Sample of Available Senior (60 Plus) Specialized Transportation Providers throughout San Diego County*

*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
Figure 4.5: Survey Sample of Available Senior (85 Plus) Transportation Providers throughout San Diego County

Survey Sample of Available Senior (85 Plus) Transportation Providers throughout San Diego County*

Analysis is based on the responses from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
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Disabled

Less than one-fifth of survey respondents offer ADA accessible transportation. Of all the survey responses, only 18 percent of the surveyed agencies provide ADA van-accessible service. Of the organizations that primarily service individuals with disabilities (non-seniors), 25 percent of those agencies provide ADA van-accessible transportation.

Transportation providers serving disabled individuals are generally located in the central/southern portion of the county (Poway, El Cajon, La Mesa, Lemon Grove, and Chula Vista) with considerable service in Solana Beach and La Jolla, as well. Figure 4.6 provides a visual display of disabled (non-senior) transportation availability. The maps representing transportation services available to persons with disabilities reveal less services available than those for seniors and an equal number of providers for low-income individuals.

Low-Income Providers. While Chapter 4 defines persons of limited means as being below a provided threshold of the poverty line, the transportation provider survey does not specify low-income conditions. As Figure 4.7 shows, limited services are available in South San Diego County, as well as the Rural North.

Twenty percent of agencies incorporate a volunteer driver program. Newer and more grassroots-oriented organizations find that offering a volunteer driver programs is not only cost-effective but preferable over shuttles or other forms of group-travel. Surveyed volunteer driver programs range in size from 1 volunteer driver vehicle to a fleet of 900.

Nine providers serve refugee populations. As discussed in Chapter 4, with a rise in in-migration in San Diego, an identified need to provide transportation for these populations to access jobs, medical-facilities, and other life-sustaining destinations has been addressed.

Veteran Transportation Programs account for nearly 20 percent of surveyed respondents. With the majority of service existing in North County, twelve programs explicitly serve veterans. As identified in Chapter 5, as soldiers continue to return home from wartime activities at an unprecedented rate, an increased need for transportation programs that provide accessibility to medical facilities is an identified concern. Figure 4.8 shows the majority of service congregates in the Escondido, Poway, La Mesa, and La Jolla communities/cities.

Other services include: homeless, youth, cancer patients, welfare to work recipients, women with children. While these population groups may not comprise of the majority of transportation disadvantaged individuals, they are certainly weighted with the same consideration and face adversity in equally different manners.
Figure 4.6: Survey Sample of Available Disabled Specialized Transportation Providers throughout San Diego County

Survey Sample of Available Disabled Specialized Transportation Providers throughout San Diego County*

*Analysis is based on the responses from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
Figure 4.7: Survey Sample of Available Low-Income Transportation Providers throughout San Diego County

Survey Sample of Available Low-Income Transportation Providers throughout San Diego County*

*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
Figure 4.8: Survey Sample of Available Veteran Transportation Providers throughout San Diego County

Survey Sample of Available Veteran Specialized Transportation Providers throughout San Diego County*

*Analysis is based on the responses gathered from the 2012 Transportation Provider Survey. The survey is a sample of the transportation providers located in San Diego and does not account for all available services.
4.8 Program Management Plan

The previously mentioned service providers and transportation programs identified in the Transportation Provider Survey, represent a sample of the available services offered Countywide. Of the 120 plus providers contacted, a sub-selection of these agencies receive funding through three SANDAG managed grant programs: Job Access Reverse Commute (JARC), New Freedom, and Senior Mini-Grant (as identified in Chapter 1 and evaluated in Chapter 3). As stated in Chapter 1, a function of the Coordinated Plan is to help identify high-prioritized projects within the region that help meet San Diego's transportation disadvantaged population’s growing needs. The Program Management Plan outlines strategies and provides tools for effectively administering and monitoring the JARC, New Freedom, and Senior Mini-Grant programs. Among these strategies and tools is a standardized reporting procedure, which consists of uniform reporting forms for invoices, progress and quarterly reports, and performance data reports. Project information will vary by number of months in operation and date on which invoices and progress reports were provided. Future Coordinated Plan updates will include project narratives for JARC and New Freedom funded services. The Program Management Plan (PMP) can be found at www.sandag.org/PMP, and is also located in Appendix E.

Volunteer Driver Program and Coalition

There are a number of transportation services which utilize valuable community volunteers in the San Diego area to transport senior and disabled passengers. The San Diego County Volunteer Driver Coalition (SDCVC) brings together representatives from private agencies, nonprofits, and municipalities to learn from each other, share knowledge and resources, establish standards for driver qualification, and training. Many coalition members, including Jewish Family Service’s On the Go – Rides and Smiles, City of Vista – Out and About, Peninsula Shepherd Center, City of Oceanside, City of La Mesa, ElderHelp, and ITN San Diego, are recipients of Senior Mini-Grant and New Freedom federal funding.

The coalition has been meeting since February 2007 and has developed a coalition member handbook with a standardized rider application, a collaborative marketing piece, and hosts a yearly volunteer appreciation and training event. Each agency develops its own volunteer driver application customized to meet the needs of their agency or program. Additionally, a data collection program has been established to document services and impact by participating agencies. To date, over 200,703 rides have been provided by the SDCVC, supported by over 175,765 hours donated by hundreds of community volunteers.
CTSA Information and Referral

Facilitating Access to Coordinated Transportation (FACT) serves as the CTSA on behalf of SANDAG. In this role, FACT maintains an inventory of transportation services in San Diego County and provides free in-person telephone referrals for the services. FACT tracks the number of referrals that are provided. Between March 2011 and March 2012 (twelve months), 1,059 referrals were provided, at an average of 81 referrals each month. Approximately half the referrals are to commercial taxi-type services for lack of alternatives. An overwhelming majority of callers were seniors or relatives and caregivers of seniors and were seeking referrals for transportation to access medical services. Most of the requests received pertained to travel within the urbanized areas of the county, and no specific follow-up is initiated by FACT after the referral is made. Additionally, FACT has implemented a transportation brokerage for seniors who cannot utilize existing services in all cities of San Diego County as of June 2012. FACT refers callers to existing transportation options, when those options do not meet their needs transportation is provided through a contracted brokerage provider. The provider is chosen based on the most efficient and cost-effective service for the individual’s needs.

RideFACT is funded by TransNet Senior Mini Grants. FACT is in partnership with several regional transportation providers who are assigned trips based on trip cost and rider needs. The service operates as a brokerage, which refers callers to existing transportation services. If the available services are in appropriate or unavailable FACT provides the ride. The RideFACT now serves all cities in San Diego County as well as Ramona and Spring Valley. The new service provides general purpose trips for seniors (60 plus) seven days a week from 7 a.m. to 8 p.m. Reservations may be requested by calling FACT and trips may be requested up to seven days ahead.

4.9 Emergency Transportation Services

Transit and social service transportation can provide critical transportation services in the event of a regional emergency. Therefore, emergency transportation services have been included in the short-range transit planning process to acknowledge the roles that transit and social service transportation can play in meeting the needs of area residents during a catastrophic event. The following sections explain these roles in detail.

Transit

Since all transit services are ADA-accessible, potentially all transit vehicles could be utilized in the event they are needed to provide relief for a major emergency. The County of San Diego’s Office of Emergency Services (OES) coordinates the overall county response to disasters. For evacuations and emergencies OES coordinates with the transit agencies to utilize fleet vehicles in the event that they are needed. There are currently 901 MTS and NCTD transit vehicles available to provide mass transportation assistance. During large-scale events, OES can coordinate with transit agencies outside of the county in the event that additional vehicles are needed for disaster relief.
Social Service Transportation

Until recently, social service transportation was not included in the pool of potential emergency relief services coordinated or available to OES. To this end, OES is currently preparing a database and negotiating transportation agreements with social service transportation providers for emergency transportation assistance. Upon its completion, this project will assist the Emergency Operations Center staff in the event that additional transportation services are needed during an emergency. The center functions as a central facility to provide regional coordinated emergency response, including the coordination of vehicles available for disaster relief and evacuation. The social service transportation database will include information on the type of service that can be offered by each provider, along with the number of passengers that can be transported.
The Coordinated Plan

Chapter 5

An Inventory of Available Public Transit and Specialized Transportation Needs
The San Diego region’s transit system serves nearly 350,000 passengers daily and continues to provide mobility options for both the discretionary and transit-dependent rider. Today, the region includes 1,628 miles of transit service including light rail, heavy rail, and local/regional bus, all of which include Americans with Disability Act (ADA) accessible vehicles. While fixed route and ADA paratransit services remain a cost-effective and reliable means of travel, transit is not always an appropriate, accessible, or applicable passenger option in the San Diego region. The Federal Transit Administration (FTA) understands that in areas where local public transportation is “unavailable, insufficient, or inappropriate” specialized transportation programs present a viable means of providing the needed service. Additionally, a myriad of variations in transportation patterns and travel needs exist within different populations making it difficult to utilize transit. Specialized transportation programs help to bridge any gaps in service or need that public transit and paratransit is not able to fulfill. The following section outlines the types of populations most likely to utilize transit, and specialized transportation when transit is not appropriate or accessible. It is recognized that transit service can be a cost-effective choice, where available, as long as those services are sufficient and appropriate to meet the needs of the identified population groups.

While past Coordinated Plans have identified seniors, individuals with disabilities, as well as, low-income persons as transportation disadvantaged populations, this Coordinated Plan recognizes even further defined sub-populations within each community of concern. For example, whereas the senior population (age 65 and older) was once identified as a singular transportation disadvantaged group, a growing body of research suggests distinct differences in senior needs based on age within the senior grouping; the transportation needs of a 65-plus year old are different from the needs of an 85-plus year old. Other identified population groups were gathered from public outreach and feedback from, the Social Service Transportation Advisory Council (SSTAC) and Coordinated Plan Ad Hoc Committee (CPAG), and through the Consolidated Transportation Service Agency (CTSA).

This chapter identifies these sub-populations for planning and operating effective transit and specialized transportation services. Newly available Census 2010 maps are included in this chapter to display the distribution of transportation disadvantaged populations. A map of the general population is also included (see Figure 5.1) to help frame the discussion and to illustrate spatial differences between the overall population and the identified groups.

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Figure 5.1: Population Density (All)
5.1 Identifying Specialized Transportation Populations

Federal ADA requirements mandate demand-based, origin-to-destination transportation assistance within three-fourths of a mile from a fixed route served by local transit to individuals who, due to functional inability, are not able to access or utilize public transit. For many individuals, their service needs expand beyond the basic ADA requirements in that they need, for example, door-through-door assistance (more personalized hands-on trip assistance) or are not able to make a reservation within the timeframe needed (a description of ADA paratransit is provided in Chapter 4). The following chapter provides detail of the unique groups that are most likely to utilize specialized transportation. While the groups mentioned below are not mutually exclusive (i.e., an individual who is a senior may also be recognized as low-income), for purposes of this plan each distinct community will be discussed independent of one another.

Senior Needs Assessment

For purposes of Identifying potential projects and programs eligible for grant funding within this plan, seniors are recognized within this plan as being 65 years of age or older. The Senior Mini-Grant (a local funding source) recognizes seniors as individuals age 60 and older, while the FTA Section 5310 Elderly and Disabled Program (federally sourced) Identifies older adults as age 65 or older. Further, this plan subcategorizes this population into two groups: individuals aged 65 to 84 and those aged 85 and older.

According to the Census 2010 data, individuals aged 65 years or older comprise of 11.4 percent of the total population in San Diego, while those aged 85 and older make up 1.7 percent of the entire population and represent 15.5 percent of the senior population (age 65 and older). Adults aged 65 and older totaled 351,000 people in 2010. Based on the San Diego Association of Governments (SANDAG) demographic projections, by 2050, this number is expected to swell to more than double the 2010 population. Further, the group aged 85 and older will experience a steady increase with nearly 54,000 adults reported in Census 2010 and an expected 186,000 adults aged 85 and older in 2050, according to the SANDAG growth forecast. Figures 5.2 and 5.3 demonstrate the density of senior populations within the County. Though the Coordinated Plan only concerns a five-year time frame, incorporating consideration for future demographic changes accounts for good planning practices and helps prepare for a comprehensive future transportation network. Based on these projections, the San Diego region can expect an increase of seniors in the coming years and will need to accommodate and plan accordingly as this relates to transportation.

While the older adult population is continuing to grow at a rapid rate, seniors are also living longer, healthier, and more mobile lives compared to generations prior. As the aging population increases, it is expected that the senior demographic of transit riders will increase, as well. For persons that are able to access transit, this will remain the most cost-efficient and productive use of existing resources. There are a number of service providers dedicated to helping seniors age in place. For

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2 While the FTA specifies the senior age as 65-plus, TransNet specifies a 60-plus age qualifier for senior transportation program funding. In order to allow projects to be eligible for either senior funding programs, analyses have been performed at the 65-plus level.
those seniors who choose to remain in their home as they age, transportation can be a bigger challenge, especially for those with limited mobility.

**Figure 5.2: Population Density of Persons 65-plus**
Figure 5.3: Population Density of Persons 85-plus
The following section identifies characteristics of the senior population that will help shape a more appropriately defined set of services along a continuum of changing mobility needs for an aging population.

Seniors Age 65 to 84

While a growing proportion of seniors age 65 and over continue to exhibit a healthy and active lifestyle, the remaining individuals within this age group typically begin to experience a decline in cognitive, sensory, and physical functioning. The changes have direct impact on their mobility; loss of vision and hearing prevent many seniors from continuing to drive and force them to look for mobility options, including transit systems and community-based transportation programs. As individuals age, they are more likely to experience: a loss in vision and/or hearing; exposure to temporary/chronic illnesses; an onset or continuation of cognitive impairments (dementia, Alzheimer’s) and neurological disorders (Parkinson’s, Multiple Sclerosis, etc.); an increased likelihood of using physical assistive devices; and any other special health conditions (including depression, cancer, etc.). In 2011, nearly one in eight older adults had at least one form of dementia and the numbers are continuing to rise. Additionally, compounding the issues, older adults are likely to have limited opportunities to earn income as many seniors age 65 and older are retired and/or are living off a fixed income.

Seniors Age 85 and Up

Individuals aged 85 and older typically experience an increase in the severity of cognitive, sensory, and physical issues, and are more likely to require supplemental caretaking and aid from family, friends, and service-providers. All developments, disorders, and impairments mentioned above are typically heightened in this age range. As the years advance, people are more likely to become incrementally more physically frail (due to aging) and may possess an increasing inability to complete daily tasks without assistance. Individuals aged 85 and older are also more likely to be effected by a mental/cognitive disease affecting their communication, will, health, and overall sense of well-being. Therefore, this population group (more so than adults aged 65 and older) is less likely to drive, meaning that public transit and especially specialized transportation become critical to meeting their mobility needs.

Service Parameters

The distinct types of trips needed by this group range from both emergency and non-emergency medical, nutrition-based, and social (visiting family, seeing a play, etc.). As many seniors are recent retirees, the need to maintain a strong social network is critical. Trips for work or volunteering are increasingly more common in such populations as older adults continue to assume roles as civic and community leaders and relish in reinventing themselves post-retirement.

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Transportation needs for this group vary by ability, disability, and capability. As mentioned above, persons age 65 and older who exhibit limited physical, cognitive, or sensory impediments would typically be able to utilize transit, if available, to meet daily travel needs. In keeping with the theme of reinventing oneself post-retirement, seniors could potentially act as transit liaisons/ambassadors that provide others (both seniors and non-seniors alike) with mobility assistance and information. In the case that transit is not a viable option; however, specialized transportation remains as a secondary option for seniors with significant mobility challenges. Seniors age 85 and older are more likely to need lift-accessible services often provided within specialized transportation programs (including ADA paratransit).

Generally speaking, senior mobility planning involves, at a minimum, consideration for travel training, door-to-door service, the option for a volunteer driver, flex/demand-based routes, and a reduced, low-fare senior discount program for transit, among other services. Where transit is available and appropriate, fixed route service is a reliable and cost-efficient means toward carrying out one’s daily needs. As seniors begin to experience forms of decline (especially apparent in the 85 and older subcategory), become frail and/or are affected by a disability or impairment, their respective transportation parameters are altered to include services that fully accommodate their needs while considering a fixed-income budget.

In recognizing that there are seniors that remain able to operate a private automobile, the need for road safety education is important. Strategies such as enhanced signage, road calming, and reflective road markings may make it safer for seniors that are healthy enough to continue driving.

**IndivIduals with Disabilities Needs Assessment**

Individuals with disabilities are identified as any persons with physical, developmental (behavioral), visual, and/or hearing impairments. The 2000 Census data conveys that 28.4 percent of the San Diego region residents identified themselves as persons with disabilities (see Figure 5.4 for a density map of individuals with disabilities within San Diego). The needs of disabled individuals vary based on each individual’s impairment. In all cases, however, transportation and the ease of access is a basic necessity in maintaining a higher quality of life which includes fulfilling basic daily needs, access to healthcare, education, and work, as well as improving/maintaining one’s mental and physical well-being.

Persons with disabilities are often placed at a disadvantage in the case that their impairment may impede their placement in the workforce, as well as, access to further education, which can lead to a higher number of unemployed, undereducated, and below-poverty level individuals. Providing appropriate transportation (including ADA paratransit) options for individuals to access medical, social, and work/education-related destinations is critical in addressing the needs of a population that is most likely either transit-dependent or reliant on other specialized transportation programs.
Reduced-Fare Eligibility Requirements

The Metropolitan Transit System (MTS) and North County Transit District (NCTD) offer reduced fares for seniors, persons with disabilities, and Medicare recipients on fixed route transit. The ADA specifies that all fixed-route transit be equipped to accommodate non-ambulatory individuals allowing for lift-operated services, among other ADA requirements discussed in fuller detail in Chapter 4. Transit operators make discounted fares available to ADA-certified passengers who are able to utilize fixed route transit. In order to benefit from such reduced fares, the transit agencies require an application process (unique to each transit agency) to determine eligibility. A description of these processes is identified in the following paragraphs.

MTS offers discounted fares to seniors (age 60-plus),4 disabled individuals, Medicare recipients, and veterans with a disability rating of 50 percent or greater.5 In order to receive the discounted fares, passengers must present proper Identification6 on buses and/or to the MTS Transit Store, Albertsons, and other participating outlets. MTS has combined its Disabled Identification Card with the Compass Card Pass to allow customers eligible for reduced fares to carry just one card. Passengers wishing to purchase discounted fares at Ticket Vending Machines only may buy a one-way Trolley fare or a monthly product which is reloaded onto existing Senior or Disabled Compass Cards. For persons interested in receiving a Reduced Fare Compass Card, one must complete a short form (for individuals that possess valid and qualifying proof of identification) or long form (those with medical disabilities who do not have such proof of identification). The long form fully describes the conditions and qualified disabilities eligible for the reduced fare identity card. The application process requires completion of the Physician’s Statement of Medical Disability Eligibility by a physician or licensed health care professional treating the applicant for this condition.

NCTD offers Reduced Fares for three different population types: seniors (age 60 and older), persons with disabilities, and Medicare Recipients7. Persons with disabilities interested in receiving the Reduced Fare/Disability Identification Card must demonstrate a physical or mental impairment as Identified by NCTD in Section 2 of the application discussed below, and must also prove that the described condition “substantially limits one or more of the major life activities...defined as being able to care for one’s self, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, work.” The Reduced Fare Identification Card may be used to purchase a discounted fare.

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4 SANDAG funding background. TransNet sets 60 as age.
5 The Cal.Pub.Util. Code § 99155(b) states that veterans with a disability rate of 100 percent are eligible for reduced fare.
6 Proper Identification includes the following: Driver’s license (for seniors), Birth certificate (for seniors), State of California Senior IDENTIFICATION (for seniors), Medicare card (for senior), Immigration papers (for seniors), Passport (for seniors), valid MTS Senior/Disabled IDENTIFICATION card, valid NCTD Senior/Disabled IDENTIFICATION card, State of California DMV Placard IDENTIFICATION (the white placard receipt from the DMV), and/or, Supplemental Security Income (SSI) or Social Security Disability Income(SSD), .
7 Personal Care Attendants (PCAs) ride free on LIFT paratransit, BREEZE buses, and SPRINTER trains when accompanying a person who is ADA certified to use LIFT services and designated as PCA eligible. Passengers utilizing fixed-route services (BREEZE and SPRINTER) with the assistance of a PCA need to present a NCTD paratransit Reduced Fare I.D. Card with the “PCA-Yes” symbol on it. When travelling on LIFT, the client informs the reservationist that their PCA will accompany them on their trip, however no NCTD Paratransit IDENTIFICATION is required when utilizing the LIFT service. The PCAs ride Free on Fixed Route Program is not available on the COASTER or San Diego (MTS) buses.
Regional Senior/Disabled/Medicare (SDM) Monthly Pass for the BREEZE bus and/or a SDM Monthly pass for the COASTER train.

In order to receive a NCTD Reduced Fare ID Card one must complete an electronic application (found at [www.gonctd.com](http://www.gonctd.com)) or pick up a hard copy of the application from the Oceanside Transit Store or the Escondido Transit Store. Once completed, the application can be returned to either of these locations (or electronically, if by internet). Seniors must present a Valid Driver’s License, Medicare Card (not a Medi-Cal Card), MTS Senior/Disabled Identification Card (NCTD Identification card is not necessary if one has a MTS Identification), or a California Identification Card. Persons with disabilities must present valid proof of eligibility by displaying one of the following: MTS Senior/Disabled Identification Card (NCTD Identification card is not necessary if one has a MTS Identification), Medicare Card (not a Medi-Cal Card), Department of Motor Vehicles disability placard receipt, Social Security Insurance award letter, or a Veterans Administration letter confirming a disability of 50 percent or greater.

### Origin-to-Destination Eligibility Requirements

The ADA requires an eligibility process for individuals interested in utilizing the paratransit service. Within the process, the ADA identifies specific federal guidelines to determine who may utilize the services. MTS and NCTD offer two separate paratransit services (Access and LIFT, respectively) to individuals who are functionally unable to utilize fixed route transit. Both MTS and NCTD contract with ADARide ([www.adaride.com](http://www.adaride.com)) to determine the eligibility of applicants interested in utilizing paratransit in the San Diego region. Both services are curb-to-curb; however, assistance is available beyond the curb, termed “door to door”, as necessitated by a rider’s disability. Customers who need assistance beyond the curb notify the reservationist when scheduling their trip.

The application process for origin-to-destination paratransit service can be accessed through ADARide directly through their website [www.adaride.com](http://www.adaride.com) or by calling to request an application at (877) 232-7433. The application process is free and requires a valid mailing address, as well as medical verification from an appropriate healthcare professional to support the application process. Concerning the application itself, the applicant must complete a series of questions that help the evaluator assess the current condition and travel needs of the potential paratransit user. The application is then reviewed by an ADARide evaluator who takes into consideration the applicants reported condition, documentation provided by the healthcare professional, home environment including local weather and terrain, bus accessibility, as well as identified inaccessible areas and/or bus stops. Applicants are informed of the receipt of application once complete and are then notified by mail of the status of certification. Once certified, individuals may book ADA paratransit trips within three-quarters of a mile of an existing fixed route service.

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8 Per Social Security Administration guidelines, the following list are considered qualified licensed healthcare professionals: Licensed physicians with an M.D. or D.O. degree; physician assistants; nurse practitioners may certify in all categories in which they are licensed to diagnose; Additionally, licensed chiropractors, podiatrists, optometrists, audiologists, licensed clinical psychologists, clinical social workers, and educational psychologists may certify in specified categories.
While ADA paratransit caters to the individual needs of the passenger, the service may not offer the travel flexibility that a customer would receive on fixed route transit. This is especially true when riders need to travel within the county between the two transit operators; a one-way trip will require transfers. The cost of the service is no more than twice the amount of a one-way fare on fixed route transit. Fixed route transit remains a cost-effective and reliable means of travel where appropriate and applicable and furthermore, maintains the capacity to transport individuals requiring specialized accommodations with wheelchair accessible services. Further, passengers holding a valid NCTD issued Paratransit Reduced Fare Identification Card may ride BREEZE or SPRINTER services without payment of any fare.

**Service Parameters**

Because there is a high correlation between persons with disabilities and individuals with limited means, transit is viewed as an attractive and cost-effective option. As Chapter 6 illustrates⁹, a majority of the persons with disabilities are within a half-mile proximity to a transit stop. Furthermore, complementary ADA paratransit service is available within a three-quarter mile distance from any transit stop which extends transit coverage beyond its regular fixed route service. However, transit is not always an appropriate or applicable service. Specialized services accommodating for individuals with disabilities must consider a myriad of factors including but not limited to: vehicles allowing for physical assistive devices/guides, Personal Care Attendants (PCA); assistance with ride scheduling and travel training; sensitivity to long waits/long travel schedules and adverse weather conditions (as it may relate to medication reactions); protective infrastructure; among other accessible services that provides the passenger with a reliable source of transportation to assist one’s daily activities and necessities.

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⁹ Please see Figure 6.4 for a map depicting a half-mile transit buffer relating to the disabled population density map.
Figure 5.4: Population Density of People with Disabilities
CHAPTER 5: AN ASSESSMENT OF TRANSPORTATION NEEDS

Individuals with Limited Means Assessment

Many individuals that identify themselves as either being a senior or a person with a disability tend to have lower incomes. Persons living at 150 percent below the poverty line are recognized as “low-income.” Within San Diego County and according to the American Community Survey 2007 to 2011 data for poverty, 22.0 percent of all residents are recognized as living within or below this threshold (see Figure 5.5 for a map showing the density of low-income individuals within the region). Based on the poverty rates defined in the Federal Job Access and Reverse Commute (Section 5316) program, an assessment of individuals whose income level is below the 150 percent poverty-line threshold is utilized for this plan. However, SANDAG also analyzes regional poverty of individuals living 100 percent below the poverty line in order to capture a broader perspective on the needs of San Diego’s residents. Table 5.1 represents a range of income levels, as it relates to poverty level.

### Table 5.1: San Diego County Population: Income Levels Compared to Poverty Level

<table>
<thead>
<tr>
<th>Year</th>
<th>&lt;100% Below Poverty Level</th>
<th>&lt;150% Below Poverty Level</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Persons</td>
<td>Percent</td>
</tr>
<tr>
<td>2010</td>
<td>387,565</td>
<td>13%</td>
</tr>
</tbody>
</table>

*Source: American Community Survey (ACS) 2007-2011, 5 year Summary. Ratio of Income to Poverty Level.*

Service Parameters

Given the definition of a low-income individual for the purposes of this plan, persons of limited means typically include any group ranging from the homeless to students to refugees/asylum seekers to single head of households and more. The Results of the 2009 Onboard Transit Passenger Survey for the San Diego Region show that 63 percent\(^\text{10}\) of transit riders are considered impoverished (living below 150 percent of the poverty line) and are most likely transit dependent (meaning no personal automobile is available for their trips). Working limited means individuals are often reliant on public transportation to meet their trip making needs. Additionally, low-income individuals typically work a non-traditional work schedule—working odd hours in the night and early morning, as well as on weekends. Compounding this issue, many households require that both heads of household (or singularly) contribute to the family’s income. Many transit trips typically include the transport of multiple children within one household as daycare is an added expense to budgets that are already stretched to and beyond their limit. As shown in Chapter 6\(^\text{11}\), the majority of households living below the poverty line live within a half mile distance to a transit stop. This presents an opportunity for fixed-route transit to meet their needs. Given the high proportion of transit-dependent households in low-income areas, service that is frequent and reliable would be most effective in serving these areas. (See Figure 5.7 for Zero Car Households in the San Diego

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\(^{10}\) From the survey, MTS reported 63.7 percent of transit rider living 150 percent below the poverty line; NCTD reported 60.1 percent of its riders as impoverished.

\(^{11}\) Please reference Figure 6.5 for the half mile transit buffer map of individuals with limited means.
region). A review of both the Low-Income (Figure 5.5) and Zero Car Household (Figure 5.7) maps shows a high correlation between these two groups.

While convenient access to frequent transit service has been identified as a basic need, access to trip-planning resources, such as the internet or phone, also stands as an impediment for low-income individuals who may not be able to afford or access such services. Additionally, in conformance with Title VI, limited means individuals may also require materials to be produced in a language other than English.

The assessment of the population density for persons with limited incomes and place of employment is important since these individuals typically depend on public transit to meet their trip making needs. While Figure 5.5 demonstrates the population density of individuals considered of limited means, Figure 5.6 provides the location of jobs within the San Diego region. The major employment centers are located in the denser urban areas of South Bay, Downtown San Diego, Mission Valley, Sorrento Valley, Poway, and Carlsbad. Upon comparing Figures 4.5 and 4.6, clusters of low-income populations are located in close proximity to the major employment centers with the exception of University City, Miramar, Kearny Mesa, Sorrento Valley, Poway, and Eastern Carlsbad. Sufficient fixed-route transit service is currently available to serve these given populations.
Figure 5.5: Population Below 150 percent Poverty Line
Figure 5.6: Job Density (Place of Work)
Figure 5.7: Zero Car Households
CHAPTER 5: AN ASSESSMENT OF TRANSPORTATION NEEDS

Other Identified Individuals

The aforementioned groups represent the bulk of individuals most likely to utilize public transit or participate in some form of specialized transportation due to age, ability, disability, or limited means. Though these populations mentioned above represent a large proportion of transportation disadvantaged communities, smaller groups with comparable needs are identified in this section. While other transit-dependent populations may exist, the following section, Identified by the SANDAG CPAG and SSTAC, represents additional transportation-disadvantaged groups. The mention of these communities also is supported by the Federal Transit Administration’s mission to equitably assist all individuals in the transportation decision making process by providing Limited English Proficiency (LEP) individuals the same participatory opportunities as non-LEP individuals. In specific reference to the veteran population discussed below, in efforts to support the SANDAG partner agencies (most notably the region’s designated CTSA) mission to maintain the most cost-efficient and productive network of service within the region, SANDAG supports and acknowledges the veteran population’s needs as described in the Veterans Transportation and Community Living Initiative grant funding opportunity.

Veterans

As of 2010, there were nearly two million veterans in the state of California. San Diego County, alone, is home to over 228,000 veterans. While a significant number of older veterans already reside in San Diego, an influx of newly discharged service members are projected to further add to the population. The need for services that will aid in their reintegration process into society is imperative. Integrating post-military service individuals into the workforce, family life, and/or society in general remains a federal and local objective and a host of organizations currently exist to provide support for younger and older veterans. Yet, with the expected increase in post-war service persons, an inevitable rise in assistive services (especially medical-related) will need to be accounted for in future program developments. However, while services such as vocational counseling, work readiness assistance, post-secondary educational training, and other independent living services may exist, the willingness for veterans to participate in such programs, for one reason or another, is a continued obstacle for state departments and agencies. In so much as reluctance and stigma may be a deterrent for veterans seeking health care or other life-sustaining and life-enhancing activities, the availability of efficient and appropriate veteran transportation services stands as a pragmatic barrier.

Service Parameters

Individuals with service-connected disabilities may require access to healthcare, rehabilitative services, as well as other independent living services and job-related trainings. Service requirements for veterans should provide specialized care and related medical and social support. Veteran transportation programs should consider flexible and resource-efficient programs that strive to reach the multitude of needs experienced by this population. At a minimum, a program should assess the feasibility of vanpools, taxi-vouchers, public-private partnerships (between the Veteran’s Affairs Medical Centers and a local transportation provider), a mobility management component, and a provision of flexible routes and feeder services to transit. Service requirements may include lift-operated vehicles and flexible-route paratransit shuttles for immobilized and remote (rural) Veterans Affairs patients. Additionally, an appropriate service should integrate veterans with
non-veterans while also supporting the individual needs of the passenger. As is the case with most transportation programs, effective marketing that allows passengers to know what services are available to them is encouraged.

In addition to the transit operators, nine specialized transportation service agencies reported providing transportation to Veterans in the 2011 Transportation Provider Survey (Appendix D):

- Traveler’s Aid Society
- FACT
- Jewish Family Services
- San Diego Center for the Blind
- Right at Home in Home Care
- LivHome
- Hostelling International San Diego
- Golden Health Transportation
- Joslyn Senior Center

As part of the Veterans Transportation and Community Living Initiative Grant (Chapter 9), SANDAG, 211 San Diego, and Full Access and Coordinated Transportation will be producing a thorough inventory of transportation services available for veterans, active duty service personnel and their families. Data collected as part of this project will be included in the next update to the Coordinated Plan.

Refugees/Asylum Seekers

Refugees and asylum seekers are individuals who had to flee their home due to war or persecution. San Diego County is home to the largest refugee and asylum seeker population in California. As newcomers to the United States, transportation access and mobility are recognized as vital components to an effective and successful resettlement process. The need for services and improved access is crucial in enabling refugees and asylum seekers to smoothly integrate into their new home. During this adaptive stage, they are more likely to experience a cultural shift as they are dealing with different cultural traditions, language barriers, amongst other issues that may impede access to healthcare, gainful employment, or access to other basic needs.

The Federal Transit Administration (FTA) requires that agencies, such as SANDAG, have a Language Assistance Plan (LAP) to help those with LEP. SANDAG developed a LAP which identifies methods of communication with non-English speakers in the region (the SANDAG LAP is available for download at http://www.sandag.org/uploads/publicationId/publicationId_1659_14384.pdf). A critical part of this communication is with refugee and asylum seeker groups, who often find that knowledge of transportation resources is a major barrier to community integration. The inclusion of refugee and asylum seeker needs in the Coordinated Plan helps combine the specific transit and specialized transportation needs surrounding language for these groups and helps support the development of the SANDAG LAP.
CHAPTER 5: AN ASSESSMENT OF TRANSPORTATION NEEDS

Service Parameters

Asylum Seekers/refugees living within close proximity to transit are encouraged to utilize fixed route transit. Travel training and mobility assistance programs, in addition to multi-lingual assistance are key factors in providing efficient access to transit to aid in the adaptation process. Shuttles and vanpooling are also viable options.

Homeless Youth/Runaways

Homeless youth/runaways (“homeless youth”) are individuals under the age of eighteen who lack parental, foster, or institutional care. This population is likely to face increased threats to both physical and mental health while living on the streets/shelters. Since the majority of homeless youth are under the driving age, transportation access to local shelters, refuge/assistance programs, medical facilities, as well as employment destinations is a significant concern for this demographic.

Service Parameters

Youth (under age 16) legally lack the ability to drive. Homeless youth, in particular, are significantly disadvantaged as they lack the means to pay for transit or other means of transportation. As transit is the most cost-effective option available to this group, the service parameters for this group involve connecting this population with the existing fixed route services and finding resources to subsidize the travel. Specific travel needs vary from accessing shelter, assistance programs, medical facilities, and where applicable, education/employment facilities. Transportation to these previously mentioned destinations is a critical component in the transitional process to more stable living conditions.

Intergenerational Programs

The earlier portion of this chapter focused on identifying the needs and general characteristics of populations traditionally recognized as transit-dependent and transportation disadvantaged. While the needs of these individuals have been addressed, an effort has been made to discover opportunities that serve multiple population groups. This unique form of coordination can include programs aimed at multiple age or ability types. The opportunity to develop such “intergenerational programs” has increasingly been recognized throughout communities nationwide as a means to responsibly coordinate existing resources and strengthen communities. Intergenerational programs may include youth volunteer drivers, joint excursions to recreational activities such as movie theatres and beaches, transit buddy programs, etc. Transportation programs that utilize cross-generational components efficiently utilize financial (vehicles, maintenance, ride scheduling software, etc.) and human resources (volunteer drivers, travel escorts, etc.), while also promoting an exchange of talent and support. Such innovative programs can provide mentorship opportunities for the youth and emotional support and nourishment for the older adults, creating a symbiotic relationship for the individuals as well as the community at large. The integration of programs that support the interaction of generations despite income, age, or disability not only helps to address the identified service parameters in a coordinated manner, but also works to target social cohesion issues such as senior isolation.
CHAPTER 6: STRATEGIES, ACTIVITIES, AND PROJECTS TO ADDRESS TRANSPORTATION GAPS

This chapter identifies gaps between current transportation services and user needs, and strategies to address those gaps. The analysis and identification of service gaps within San Diego is based on a compilation of sources ranging from a review of the Census 2010 demographic data in Chapter 5, the availability of transit service, and survey outreach efforts targeting both transportation providers and passengers. As was noted in Chapter 5, public transit is often the most cost-effective and productive means of travel for seniors, low-income individuals, and persons with disabilities. In the case that transit is not available, sufficient or appropriate, specialized transportation programs help to round out a more balanced mobility network for the region. This chapter begins with a discussion of service gaps and then provides strategies, activities, and projects that can help patch together a seamless transportation network of both transit and specialized transportation. Some proposed strategies have already been implemented within the region, while others are nationwide best practices that could be applied in the San Diego region. The identification of service gaps and strategies to meet those gaps found in this chapter sets the stage for the prioritization of strategies in Chapter 7.

6.1 Gaps in Transportation Services

Gaps in transportation services were identified by comparing Census 2010 data to the transportation inventory in Chapter 4. This information was supplemented with testimony given at the outreach meetings. Fixed-route public transit services were used for the analysis of all of the population groups to show where transit service can meet the daily needs of those population groups within the region. This determination was based on the Federal Transit Administration’s (FTA) guidelines of half-mile walking distances to transit stations\textsuperscript{1}. Areas with identified transportation service gaps in fixed-route transit services are flagged on all of the maps in this chapter via “call-outs.”

While this chapter and the following chapter (identifying the priorities for implementation) focus on seniors, low-income individuals, and persons with disabilities, the general population is also mapped to frame the discussion. A number of gaps identified in the General Population Map (see Figure 6.1) will be addressed through the implementation of bus rapid transit projects discussed

\textsuperscript{1} Federal Register/Vol. 74, No. 218/Friday, November 13, 2009, “All pedestrian improvements located within one-half mile and all bicycle improvements located within three miles of a public transportation stop or station shall have a de facto relationship to public transportation.
in more detail in Chapter 9. Furthermore, SANDAG developed the Urban Area Transit Strategy as part of the 2050 Regional Transportation Plan. One of the goals of the strategy is to maximize transit ridership in the greater urbanized area of the region. This means that the provision of fixed-route service relies on a certain level of investment in transit supportive land uses (i.e., good pedestrian access/connectivity and sufficient residential and employment densities).
Figure 6.1: Population Density Beyond 1/2 Mile Transit Service Area
Transit and Specialized Transportation Gaps — Seniors

As Figure 6.2 demonstrates, significant transit coverage is available to the senior population (age 65 and older) throughout most of the urbanized areas of the County. North County Transit District provides fixed-route BREEZE service near all of the major freeways and rail (COASTER and SPRINTER) corridors. Pockets of areas not serviced by transit are identified on the maps, including East Oceanside, sections of Carlsbad east of Interstate 5, and areas south of State Route 78. While the Metropolitan Transit Service provides coverage for the majority of its service area, there are some identified gaps, which include La Jolla, North La Mesa, Otay Mesa, and eastern portions of El Cajon.
Figure 6.2: Population Density of Persons 65-Plus Beyond 1/2 Mile Transit Service Area
As discussed in Chapter 5, the needs of a 65 year old individual often times vary from the more sensitive needs of a person age 85 and older. As shown in Figure 6.3, most communities with significant densities of individuals 85 and older are served by public transit. However, it is challenging for many of these individuals to walk a half-mile to a transit station, and increasing rates of physical, cognitive, and sensory impairments may impede their ability to use fixed route services all together. As seniors begin to reach this echelon, their needs may be better met utilizing specialized transportation services.
Figure 6.3: Population Density of Persons 85-Plus Beyond 1/2 Mile Transit Service Area
Transit and Specialized Transportation Gaps — Individuals with Disabilities

The majority of concentrated populations of individuals with disabilities in San Diego County directly correspond to that of the general population. Furthermore, areas recording high numbers of disabled persons also report higher levels of poverty. Drawing from Figure 6.4, the majority of individuals with disabilities live within a half-mile distance from a transit stop or station. Communities that lack sufficient coverage are Eastlake, Mira Mesa, and East Carlsbad. As Americans with Disabilities Act (ADA) Paratransit serves certified individuals up to three-quarters of a mile distance from a transit stop or station, the service coverage expands to include nearly all communities with large segments of disabled populations. However, not all individuals who are disabled will qualify for ADA Paratransit services.
Figure 6.4: Population Density of People with Disabilities Beyond 1/2 Mile Transit Service Area
Transit and Specialized Transportation Gaps — Individuals of Low-Income

An assessment of individuals in poverty was undertaken based on the poverty rates defined in the federal Jobs Access and Reverse Commute program, which expands the assessment of poverty to include all individuals whose income level is below the 150 percent poverty-line threshold. Gaps in transportation service for this population sub-group are shown in Figure 6.5. These areas include San Ysidro, City Heights, El Cajon, Linda Vista, University City, Escondido, and Fallbrook.
Figure 6.5: Population Below 150 Percent of Poverty Line Beyond 1/2 Mile Transit Service Area
6.2 Strategies

Strategies were generated to address the gaps identified in the first part of this chapter. These strategies were developed by analyzing the identified gaps, looking at successful projects in the San Diego region and best practices nationwide, and using stakeholder feedback through outreach meetings, the Coordinated Plan Adhoc Group, and the Social Services Transportation Advisory Council. Some strategies are geographically based, calling for increasing services in areas with identified gaps. Other strategies are project or service-based, promoting a gamut of services to complement the existing fixed route system. An exhaustive list of project-based strategies is included in Appendix N. Strategies are then grouped into priorities, which are in-turn arranged into “Very High,” “High,” “Mid,” and “Low” categories indicating their priority for implementation in Chapter 7. Some of the more important and complex strategies are discussed in detail below.

Coordination of Transportation Resources

One key strategy is the coordination of public transit and specialized transportation. Effective coordination can help improve transportation service delivery, improve cost-effectiveness for service providers, eliminate gaps in service, and remove real or perceived transportation barriers. Specifically, benefits of coordinated transit and specialized transportation services include:

Economic Benefits

- Enhanced Mobility: expanding the service area and hours increases employment opportunities for potential and underemployed workers.
- Increased Efficiency: reducing the cost per vehicle-hours or miles traveled, potentially saving money for providers and users.
- Economies of Scale: allows bulk purchasing of vehicles, insurance, maintenance, and training.
- Additional Funding: more total funding and greater number of funding sources.
- Increased Productivity: more trips per month or passengers per vehicle-hour.

Social Benefits

- Allows Independence: improves quality of life by improving access to work, medical needs, shopping, social events, and religious services for those who cannot drive.
- Easy-to-Use System: coordinated services are better publicized, reliable, and accessible for users with the potential of serving more destinations.
While there are numerous benefits of coordinating transportation services, there also are many existing barriers facing coordination. The following areas were identified which could be improved or coordinated to enhance efficiency and service delivery:

**Challenges**

- **Training and Maintenance:** school districts, transit, paratransit, and other transportation providers operate their own training programs for drivers and own maintenance program for vehicles.
- **Eligibility:** each transportation system has different eligibility requirements for riders precluding efficient coordination.
- **Capital Cost and Purchasing:** each transportation system typically purchases its own equipment and vehicles.
- **Reporting and Usage:** federal, state, and local funds used for transportation have different restrictions and reporting requirements.
- **Funding Source Restrictions:** various sources of funding restrict different transportation service to specific populations for specific purposes.
- **Coordination of travel information across modes and systems:** the availability of specialized services is not typically displayed in major information systems such as Google Transit, 511, or via the transit operators (trip planners, web schedules, etc.). The public is given only transit mobility options and are often unaware of other private or nonprofit transportation services.

**Mobility Management**

Mobility management is a strategic approach to service coordination and customer service. Mobility management coordinates transportation services among all customer groups, service providers, and funding agencies. In practice this is done by providing both consumers and providers with information, and matching individuals to the most appropriate travel option given their individual need.

As mentioned earlier, the San Diego region has a wide variety of transportation providers available to service the community’s myriad of needs. There are barriers to accessing many of these services. For individuals who do not have access to travel information or need assistance in locating service providers, mobility management acts as a resource to provide the community with a continuum of accessible transportation options. Mobility management is an innovative and resourceful solution toward consolidating transportation service delivery and focuses on providing the most appropriate service for each individual consumer. Whereas typical transit agencies utilize a single service operator, this system is able to draw from multiple service providers that can best match the most appropriate, efficient, and cost-effective service for each individual rider.
Mobility management programs can have the following characteristics, distinguishing them from the traditional transportation service development model:

- **Disaggregated rather than aggregated service planning.** Under the mobility management concept, the agency disaggregates markets, seeks to understand the individualized needs of those markets, and designs service strategies to effectively meet those needs.

- **Service diversity rather than service uniformity.** Most transportation systems are built on a principle of unified, fixed route service coverage. Mobility management involves the development of a network of multiple services to serve a wide variety of needs.

- **Multiple rather than a single provider.** Under the mobility management arrangement, the agency looks to broker service to the most efficient and effective provider. The result is a transportation network of diverse providers rather than a single system.

- **Service advocate rather than service provider.** Transportation agencies, including transit agencies, generally focus on the direct provision of service delivery. Under mobility management, the agency views itself as a travel agent seeking the most effective strategy for meeting service needs.

Most mobility management programs are eligible for FTA capital funding covering 80 percent of eligible expenses.

### Voucher Programs

Voucher programs are similar to Volunteer Driver Programs, but place the responsibility on the passenger to find someone to provide the needed ride. Qualified passengers are given vouchers, which they can give to a driver in exchange for the provision of a ride. Vouchers can be given to friends, family, neighbors, or even strangers. The advantage of a voucher program is the relatively low overhead, but it may not work for people have difficulties finding a driver. During the last few years, two models for managing voucher systems have emerged.

- **Checkbook Model** – customers receive a pre-printed checkbook with an allocation of miles or trips from the supporting agency. The customer trades the check for a ride with a volunteer. The support agency can help locate rides or offer trip planning support; however, customers may plan the trips themselves, thereby requiring less management on the part of the supporting agency. In either case, the supporting agency allocates vouchers and reimburses drivers. Although volunteer drivers are paid, the driver maintains volunteer status under Internal Revenue Service rules.

- **i-voucher Model** – the i-voucher model involves pre-printed rides with specified origins and destinations which contain information about mileage, value, and documentation (e.g., driver’s signature, rider data). Voucher sites reimburse drivers and invoice funding sources.
This chapter provides strategic direction to assist the San Diego Association of Governments (SANDAG) in selecting projects funded through the Job Access and Reverse Commute (JARC) and New Freedom programs under Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), Section 5310 under Moving Ahead for Progress in the 21st Century (MAP-21), and TransNet Senior Mini-Grant programs. The strategies in this section were developed to meet the regional transit and specialized transportation needs as identified through the various outreach efforts, demographic research, previous survey efforts, and transportation inventory analysis completed over the last five years.

### 7.1 Requirement for Prioritization

Both SAFETEA-LU and MAP-21 require that the prioritization of projects and strategies be included in the Coordinated Plan for SANDAG to distribute federal funding through the JARC, New Freedom, and Section 5310 grant programs. The 2010 to 2014 Coordinated Plan was the first plan to include separate lists for the rural and urbanized areas, utilizing the rural specific research conducted in 2010. The 2014 to 2018 version of the Coordinated Plan continues to provide both an urban and rural list of priorities recognizing the distinct needs of each population. The need for project prioritization has become particularly valid over the past several years as SANDAG has received more requests for funding than are available for distribution.

The list of priorities prepared for the urban and rural areas were developed through an expansive public outreach program described in Chapter 2 and the analysis of data gathered via surveys and mapping techniques included in Chapter 6. The resulting priorities are included in the following tables are organized according to specific population groups. There are four priority levels ranging from “Very High Priorities” to “Low Priorities.” Areas that refer to “identified gaps in transportation service” refer to the geographic gaps identified in Chapter 6. Potential applicants for JARC, New Freedom, Section 5310, and Senior Mini-Grant funds may also wish to utilize the Census 2010 population maps identified in Chapter 5, and compare those to the availability of specialized transportation providers mapped in Chapter 4.

The prioritization is also relevant in assisting the state selection of projects for nonurban areas. This plan also serves as a reference for decision making in situations when new grant opportunities becomes available. For example, when the Federal Transit Administration recently announced availability of the Veterans Transportation and Community Living Initiative grant funds, SANDAG supported a project, which was consistent with the Coordinated Plan priorities.

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1 A list of potential issues and strategies is included in Appendix N.

2 Gaps in service from previous Coordinated Plan efforts are retained in Appendix M.
The priorities included in this chapter will assist SANDAG in its effort to continue the distribution of specialized transportation funding in the most equitable manner possible. The priority tables are included in Tables 7.1 through 7.6.

**Table 7.1: Urban Coordinated Plan Strategies – Low Income and Reverse Commute**

<table>
<thead>
<tr>
<th>7.1.A</th>
<th>Very High</th>
<th>Develop or expand transit in areas with little or no other transportation options (or replace services that have been cut in those areas, such as transit or school bus transportation) based on identified gaps (see Chapter 6 and Appendix M).</th>
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<tbody>
<tr>
<td></td>
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<td>Examples include:</td>
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<td></td>
<td></td>
<td>▪ Increased frequencies</td>
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<td>▪ Extended hours of service</td>
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<table>
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<tr>
<th>7.1.B</th>
<th>Very High</th>
<th>Develop or expand transportation solutions in areas with sufficient densities to support transit or coordinated services based on identified gaps (see Chapter 6 and Appendix M).</th>
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<tr>
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<td>Examples include:</td>
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<td>▪ Volunteer driver programs</td>
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<td></td>
<td></td>
<td>▪ Taxi vouchers</td>
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<td></td>
<td></td>
<td>▪ Travel training programs (public transportation driver sensitivity training, peer-to-peer travel training, regional travel training program, etc.)</td>
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<td></td>
<td></td>
<td>▪ Mobility management services</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>7.1.C</th>
<th>High</th>
<th>Increase inter-agency coordination efforts to maximize existing capacity and reduce program costs.</th>
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<td>Examples include:</td>
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<td></td>
<td>▪ Develop centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage</td>
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<td>▪ Provide travel training to encourage more individuals to ride regular transit</td>
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<td>▪ Increase coordination of resources such as vehicles, vehicle maintenance, drivers, driver training programs, insurance coverage, ride subsidies, dispatching equipment, software, gas cards for volunteers, etc.</td>
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<td>▪ Support collaborations between nonprofit and private organizations to assist with transit pass subsidies.</td>
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<tr>
<th>7.1.D</th>
<th>High</th>
<th>Increase work-based transit service hours of operation to assist nontraditional work schedules.</th>
</tr>
</thead>
</table>
7.1.E High Improve accessibility to encourage more low income individuals to ride public transit.

Examples include:
- Improve marketing of 511 and other similar services to better advertise transit and other specialized transportation programs
- Develop or enhance volunteer driver programs, including the support of volunteer driver coalitions
- Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops
- Travel training programs (public transportation driver sensitivity training, peer-to-peer travel training, regional travel training program, etc.)

7.1.F High Improve first-mile, last-mile strategies to better connect to transit.

Examples include:
- Develop carsharing/bikesharing options and other feeder services (shuttle) that better connect to fixed route transit

7.1.G Mid Upgrade transit stops and amenities where appropriate.

Examples include:
- Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate

7.1.H Mid Provide services to connect areas not served by fixed route transit-to-transit.

Examples include:
- Expand public information regarding alternative transportation programs
- Create a feeder service to fixed-route service

7.1.I Low Increase level of service on off-peak fixed route services.

7.1.J Low Increase availability and accessibility of programs that better connect riders to transit or specialized transportation services.

Examples include:
- Develop nonmotorized transportation programs (i.e., bicycle, etc.)
- Enhance existing guaranteed ride home programs
- Improve bus public address systems
- Improve 511 website and other transit information sites
- Improve information on routes and schedules for buses and Trolley system
- Improve real-time travel information on buses and Trolleys
- Enhance driver training program to improve passenger information
### Table 7.2: Urban Coordinated Plan Strategies – Individuals with Disabilities

| 7.2.A | Very High | Develop or expand transit in areas with little or no other transportation options (or replace services that have been cut in those areas, such as transit or school bus transportation) based on identified gaps (see Chapter 6 and Appendix M).  
Examples include:  
- Increased frequencies  
- Extended hours of service |
| 7.2.B | Very High | Develop or expand transportation solutions in areas with sufficient densities to support transit or coordinated services based on identified gaps (see Chapter 6 and Appendix M).  
Examples include:  
- Volunteer driver programs  
- Car loan services  
- Shuttles  
- Taxi vouchers  
- Travel training  
- Mobility management services |
| 7.2.C | High | Increase inter-agency coordination efforts to maximize existing capacity and reduce program costs.  
Examples include:  
- Coordinate service with other operators to provide coverage where none currently exists now, but could potentially be supported  
- Develop centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage  
- Increase coordination of resources such as vehicles, vehicle maintenance, drivers, driver training programs, insurance coverage, ride subsidies, dispatching equipment, software, gas cards for volunteers, etc.  
- Improve paratransit between transit district service areas by eliminating transfers |
| 7.2.D | High | Provide door-to-door (and door-through-door, when necessary) for trips such as nonemergency medical transportation, in circumstances where paratransit is insufficient, inappropriate, or unavailable. |
| 7.2.E | High | Increase work-based transit service hours of operation to assist nontraditional work schedules. |
7.2.F  **High** Improve accessibility to encourage more disabled individuals to ride public transit.

Examples include:

- Expand paratransit eligibility beyond the 3/4-mile boundary.
- Decrease Americans with Disability Act (ADA) paratransit waiting time period for pick-ups and drop-offs.
- Improve accessibility for individuals with disabilities through the provision of travel training for paratransit users to encourage more individuals to ride regular fixed-route transit; improved accessible travel paths to transit stops and stations; and retrofitting of existing bus stops to ensure accessibility and ADA compliance.
- Improve marketing of 511 and other similar services to better advertise transit and other specialized transportation programs.
- Develop or enhance volunteer driver programs, including the support of volunteer driver coalitions.
- Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops.

7.2.G  **High** Improve first-mile, last-mile accessible strategies to better connect to transit.

Examples include:

- Shuttles
- Taxi vouchers
- Volunteer driver programs
- Develop carsharing options and other feeder services (shuttle) that better connect to fixed route transit.

7.2.H  **Mid** Upgrade transit stops and amenities where appropriate.

Examples include:

- Upgrade bus stops to include weather protection, shelters, benches, and lighting, where appropriate.
- Retrofit existing bus stops to ensure accessibility and ADA compliance.
- Improve accessible travel paths to transit stops and stations.

7.2.I  **Mid** Provide services to connect areas not served by fixed route transit-to-transit.
7.2.J  **Low**  Increase level of service on off-peak fixed route services.

Examples include:
- Increase COASTER and SPRINTER service, including regular weekend service
- Increase level of express transit service
- Increase paratransit service hours
- Increase weekend hours for fixed-route services

7.2.K  **Low**  Increase availability and accessibility of programs that better connect riders to transit or specialized transportation services.

Examples include:
- Enhance sensitivity training for drivers particularly for those assisting passengers with developmental disabilities

7.2.L  **Low**  Purchase and implement technology to promote cohesive use between public and private transportation providers.

Examples include:
- Install closed-circuit television devices and monitoring personnel at stations, including signage
- Improve 511 website and other transit information sites
- Improve bus public address systems
- Improve dispatch equipment communication system to ensure that passengers will be transported in the most appropriate vehicle
- Improve real time travel information on buses and Trolleys
- Improve bus public address systems
Table 7.3: Urban Coordinated Plan Strategies – Seniors

| 7.3.A | Very High | Develop or expand transit in areas with little or no other transportation options (or replace services that have been cut in those areas, such as transit or school bus transportation) based on identified gaps (see Chapter 6 and Appendix M).
|       |           | Examples include:
|       |           |   - Increased frequencies
|       |           |   - Extended hours of service

| 7.3.B | Very High | Develop or expand transportation solutions in areas with sufficient densities to support transit or coordinated services based on identified gaps (see Chapter 6 and Appendix M).
|       |           | Examples include:
|       |           |   - Volunteer driver programs
|       |           |   - Car loan services
|       |           |   - Shuttles
|       |           |   - Taxi vouchers
|       |           |   - Travel training
|       |           |   - Mobility management services

| 7.3.C | High | Increase inter-agency coordination efforts to maximize existing capacity and reduce program costs.
|       |      | Examples include:
|       |      |   - Develop centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage to maximize service coverage areas
|       |      |   - Provide door-to-door service (and door-through-door when necessary) for trips such as nonemergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable

| 7.3.D | High | Improve accessibility to encourage more senior individuals to ride public transit.
|       |      | Examples include:
|       |      |   - Provide travel training to encourage more individuals to ride regular transit
|       |      |   - Improve marketing of 511 and other similar services to better advertise transit and other specialized transportation programs
|       |      |   - Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops
7.3.E High Provide door-to-door (and door-through-door, when necessary) for trips such as nonemergency medical transportation, in circumstances where paratransit is insufficient, inappropriate, or unavailable.

<table>
<thead>
<tr>
<th>7.3.F High</th>
<th>Study the feasibility of Nonemergency Medical Transportation using Medicaid/Medical funding</th>
</tr>
</thead>
</table>

7.3.G High Improve first-mile, last-mile strategies to better connect to transit.

Examples include:
- Shuttles
- Taxi vouchers
- Volunteer driver programs
- Develop carsharing options and other feeder services (shuttle) that better connect to fixed route transit

7.3.H Mid Upgrade transit stops and amenities where appropriate.

Examples include:
- Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate
- Replace specialized transportation vehicles that are beyond their useful life

7.3.I Mid Increase work-based transit service hours of operation to assist nontraditional work schedules.

7.3.J Mid Provide services to connect areas not served by fixed route transit-to-transit.

Examples include:
- Expand public information regarding alternative transportation programs
- Provide demand responsive transportation for areas not served by fixed-route transit

7.3.K Low Increase level of service on off-peak fixed route services.

Examples include:
- Increase COASTER and SPRINTER service, including regular weekend service
- Increase level of express transit service
- Increase paratransit service hours
- Increase weekend hours for fixed-route services
<table>
<thead>
<tr>
<th>7.3.L</th>
<th>Low</th>
<th>Purchase and implement technology to promote cohesive use between public and private transportation providers.</th>
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<tr>
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<td>Examples include:</td>
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<td></td>
<td></td>
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<td>- Improve dispatch equipment communication system to ensure that passengers will be transported in the most appropriate vehicle</td>
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<td>- Improve real time travel information on buses and Trolleys</td>
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<td></td>
<td></td>
<td>- Improve information on routes and schedules for buses and Trolley system</td>
</tr>
</tbody>
</table>
Table 7.4: Rural Coordinated Plan Strategies – Low Income and Reverse Commute

| 7.4.A | Very High | Develop or expand transportation solutions in areas with sufficient densities to support transit or coordinated services based on identified gaps (see Chapter 6 and Appendix M).  
Examples include:  
- Volunteer driver programs  
- Car loan services  
- Shuttles  
- Taxi vouchers  
- Travel training programs (public transportation driver sensitivity training, peer-to-peer travel training, regional travel training program, etc.)  
- Mobility management services |

| 7.4.B | High | Increase inter-agency coordination efforts to maximize existing capacity and reduce program costs.  
Examples include:  
- Develop centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage  
- Provide travel training to encourage more individuals to ride regular transit  
- Increase coordination of resources such as vehicles, vehicle maintenance, drivers, driver training programs, insurance coverage, ride subsidies, dispatching equipment, software, gas cards for volunteers, etc.  
- Support collaborations between nonprofit and private organizations to assist with transit pass subsidies |

| 7.4.C | High | Increase work-based transit service hours of operation to assist nontraditional work schedules. |

| 7.4.D | High | Improve accessibility to encourage more low income individuals to ride public transit.  
Examples include:  
- Improve marketing of 511 and other similar services to better advertise transit and other specialized transportation programs  
- Develop or enhance volunteer driver programs, including the support of volunteer driver coalitions  
- Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops.  
- Travel training programs (public transportation driver sensitivity training, peer-to-peer travel training, regional travel training program, etc.) |
### 7.4.E High
Improve first-mile, last-mile strategies to better connect to transit.

Examples include:
- Develop carsharing/bikesharing options and other feeder services (shuttle) that better connect to fixed route transit

### 7.4.F Mid
Upgrade transit stops and amenities where appropriate.

Examples include:
- Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate

### 7.4.G Mid
Provide services to connect areas not served by fixed route transit-to-transit.

Examples include:
- Expand public information regarding alternative transportation programs
- Create a feeder service to fixed-route service

### 7.4.H Low
Increase level of service on off-peak fixed route services.

### 7.4.I Low
Increase availability and accessibility of programs that better connect riders to transit or specialized transportation services.

Examples include:
- Develop or improve veteran medical and nonmedical transportation
- Develop nonmotorized transportation programs (i.e., bicycle, etc.)
- Enhance existing guaranteed ride home programs
- Improve bus public address systems
- Improve 511 website and other transit information sites
- Improve information on routes and schedules for buses and Trolley system
- Improve real-time travel information on buses and Trolleys
- Enhance driver training program to improve passenger information
### Table 7.5: Rural Coordinated Plan Strategies – Individuals with Disabilities

<table>
<thead>
<tr>
<th>7.5.A</th>
<th>Very High</th>
<th>Develop or expand transportation solutions in areas with sufficient densities to support transit or coordinated services based on identified gaps (see Chapter 6 and Appendix M). Examples include:</th>
</tr>
</thead>
</table>
|       |           | - Volunteer driver programs  
|       |           | - Car loan services  
|       |           | - Shuttles  
|       |           | - Taxi vouchers  
|       |           | - Travel training  
|       |           | - Mobility management services  |

<table>
<thead>
<tr>
<th>7.5.B</th>
<th>High</th>
<th>Increase inter-agency coordination efforts to maximize existing capacity and reduce program costs. Examples include:</th>
</tr>
</thead>
</table>
|       |      | - Coordinate service with other operators to provide coverage where none currently exists now, but could potentially be supported  
|       |      | - Develop centralized ride scheduling, voucher programs, dispatching, and mobility management/brokerage  
|       |      | - Increase coordination of resources such as vehicles, vehicle maintenance, drivers, driver training programs, insurance coverage, ride subsidies, dispatching equipment, software, gas cards for volunteers, etc.  
|       |      | - Improve paratransit between transit district service areas by eliminating transfers  |

| 7.5.C | High | Provide door-to-door (and door-through-door, when necessary) for trips such as nonemergency medical transportation, in circumstances where paratransit is insufficient, inappropriate, or unavailable. |

| 7.5.D | High | Increase work-based transit service hours of operation to assist nontraditional work schedules. |
### 7.5.E High Improve accessibility to encourage more disabled individuals to ride public transit.

Examples include:
- Expand paratransit eligibility beyond the 3/4-mile boundary
- Decrease ADA paratransit waiting time period for pick-ups and drop-offs
- Improve accessibility for individuals with disabilities through the provision of travel training for paratransit users to encourage more individuals to ride regular fixed-route transit; improved accessible travel paths to transit stops and stations; and retrofitting of existing bus stops to ensure accessibility and ADA compliance
- Improve marketing of 511 and other similar services to better advertise transit and other specialized transportation programs
- Develop or enhance volunteer driver programs, including the support of volunteer driver coalitions
- Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops

### 7.5.F High Improve first-mile, last-mile accessible strategies to better connect to transit.

Examples include:
- Shuttles
- Taxi vouchers
- Volunteer driver programs
- Develop carsharing options and other feeder services (shuttle) that better connect to fixed route transit

### 7.5.G Mid Upgrade transit stops and amenities where appropriate.

Examples include:
- Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate
- Retrofit existing bus stops to ensure accessibility and ADA compliance
- Improve accessible travel paths to transit stops and stations

### 7.5.H Mid Provide services to connect areas not served by fixed route transit to transit.
| 7.5.I | Low | Increase level of service on off-peak fixed route services.  
Examples include:  
- Increase COASTER and SPRINT service, including regular weekend service  
- Increase level of express transit service  
- Increase paratransit service hours  
- Increase weekend hours for fixed-route services |
| 7.5.J | Low | Increase availability and accessibility of programs that better connect riders to transit or specialized transportation services.  
Examples include:  
- Enhance sensitivity training for drivers particularly for those assisting passengers with developmental disabilities |
| 7.5.K | Low | Purchase and implement technology to promote cohesive use between public and private transportation providers.  
Examples include:  
- Install closed-circuit television devices and monitoring personnel at stations, including signage  
- Improve 511 website and other transit information sites  
- Improve bus public address systems  
- Improve dispatch equipment communication system to ensure that passengers will be transported in the most appropriate vehicle  
- Improve real time travel information on buses and Trolleys  
- Improve bus public address systems |
### Table 7.6: Rural Coordinated Plan Strategies – Seniors

<table>
<thead>
<tr>
<th>7.6.A</th>
<th><strong>Very High</strong></th>
<th>Develop or expand transportation solutions in areas with sufficient densities to support transit or coordinated services based on identified gaps (see Chapter 6 and Appendix M).</th>
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<tr>
<td></td>
<td></td>
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<td></td>
<td>- Shuttles</td>
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<td>- Travel training</td>
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<td>- Mobility management services</td>
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<th>7.6.B</th>
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<th>Increase inter-agency coordination efforts to maximize existing capacity and reduce program costs.</th>
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<tr>
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<td>- Provide door-to-door service (and door-through-door when necessary) for trips such as nonemergency medical transportation and grocery shopping in circumstances where paratransit is insufficient, inappropriate, or unavailable</td>
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<tr>
<th>7.6.C</th>
<th><strong>High</strong></th>
<th>Improve accessibility to encourage more senior individuals to ride public transit.</th>
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<td>Examples include:</td>
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<td></td>
<td>- Improve accessible travel information and services for visitors and residents, including increased language requirements and automated auditory destination cues at transit stops</td>
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</table>

| 7.6.D | **High** | Provide door-to-door (and door-through-door, when necessary) for trips such as nonemergency medical transportation, in circumstances where paratransit is insufficient, inappropriate, or unavailable. |

| 7.6.E | **High** | Study the feasibility of Nonemergency Medical Transportation using Medicaid/Medical funding |

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CHAPTER 7: PRIORITIES FOR PROJECT FUNDING

Coordinated Plan (2014 – 2018)
### 7.6.F **High** Improve first-mile, last-mile strategies to better connect to transit.

Examples include:
- Shuttles
- Taxi vouchers
- Volunteer driver programs
- Develop carsharing options and other feeder services (shuttle) that better connect to fixed route transit

### 7.6.G **Mid** Upgrade transit stops and amenities where appropriate.

Examples include:
- Upgrade bus stops to include weather protection, shelters, benches, and lighting where appropriate
- Replace specialized transportation vehicles that are beyond their useful life

### 7.6.H **Mid** Increase work-based transit service hours of operation to assist nontraditional work schedules.

### 7.6.I **Mid** Provide services to connect areas not served by fixed route transit-to-transit.

Examples include:
- Expand public information regarding alternative transportation programs
- Provide demand responsive transportation for areas not served by fixed-route transit

### 7.6.J **Low** Increase level of service on off-peak fixed route services.

Examples include:
- Increase COASTER and SPRINTER service, including regular weekend service
- Increase level of express transit service
- Increase paratransit service hours
- Increase weekend hours for fixed-route services
7.6.K  **Low**  Purchase and implement technology to promote cohesive use between public and private transportation providers.

Examples include:

- Install closed-circuit television devices and monitoring personnel at stations, including signage
- Improve 511 website and other transit information sites
- Improve bus public address systems
- Improve dispatch equipment communication system to ensure that passengers will be transported in the most appropriate vehicle
- Improve real time travel information on buses and Trolleys
- Improve information on routes and schedules for buses and Trolley system
The Coordinated Plan

Chapter 8
Funding
Public transit and specialized (human services) transportation services in San Diego are funded from a variety of public and private sources. This chapter outlines federal, state, and local funding sources that are available.

8.1 Federal

The federal highway, mass transit, and surface transportation safety programs are periodically authorized in a multi-year surface transportation reauthorization bill. The 2005 reauthorization act, the Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU), was extended until July 6, 2012. On this date, President Obama signed into law the new surface transportation bill, Moving Ahead for Progress in the 21st Century (MAP-21). Based on annual levels established in the authorizing legislation, Congress then appropriates funds for transportation programs. Funding for the New Freedom and the Job Access and Reverse Commute (JARC) specialized transportation programs was available under SAFETEA-LU through Federal Fiscal Year (FFY) 2012. MAP-21 funding will apply to future years, including the FFY 2013 and FFY 2014 apportionments.

Under SAFETEA-LU, JARC, and New Freedom funds were apportioned to the San Diego Association of Governments (SANDAG) for the census designated San Diego urbanized area, shown in Figure 8.1. Upon apportionment, SANDAG is responsible for distributing the funds to eligible subrecipients through a competitive process. Funds apportioned for FFY 2012 were awarded to subrecipients on March 22, 2013. Any unspent JARC and New Freedom funds that may become available will be distributed through future competitive processes along with MAP-21 funds. Thus, JARC and New Freedom projects funded through SAFETEA-LU will continue to be active in the coming years, making it appropriate to discuss these programs in this Coordinated Plan update. For the SAFTEA-LU 5310 Program, funds for the State of California were apportioned directly to Caltrans for statewide distribution. FFY 2012 funds were awarded to subrecipients on August 13, 2013. Projects under this cycle will continue to be implemented after the adoption of this Coordinated Plan. Alternatively, federal transportation funds that aren’t awarded competitively do not experience this same lag, and consequently will only be discussed under the “MAP-21 Programs” section.
Figure 8.1: Census Defined Urbanized Area (Census 2010) of San Diego County
8.1.1 SAFETEA-LU Programs

Federal Transit Administration (FTA) Section 5310 Formula Funds for Service to Elderly Individuals and Individuals with Disabilities. The goal of the Section 5310 program under SAFETEA-LU is to improve mobility for seniors and individuals with disabilities. These funds can be used for capital purposes only, such as the procurement of vehicles, radios or computers to support senior and disabled transportation programs. Funding is apportioned to the states by a formula. The State of California, through the actions of the Caltrans and the California Transportation Commission (CTC), allocates the funds on a statewide competitive basis.

The primary recipients of these funds are nonprofit agencies that provide transportation for seniors and persons with disabilities; however, public transit agencies may apply if they can show that no nonprofits are readily available to provide service for which the funds are being requested. Table 8.1.1A shows the FFY 2012 Section 5310 projects in San Diego County selected for funding. SANDAG assists prospective grantees with the development and refinement of their Section 5310 applications, hosts workshops, forms a Local Review Committee to complete preliminary scoring of applications, and delivers the project list with scores to Caltrans Division of Mass Transportation.

Table 8.1.1A: FTA Section 5310 Projects in San Diego County Selected for Funding

<table>
<thead>
<tr>
<th>Agency</th>
<th>Project Type</th>
<th>Type*</th>
<th>Total (100 Points)</th>
<th>Total Project $</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends of Adult Day Health Care Centers</td>
<td>Medium Bus</td>
<td>SE</td>
<td>93</td>
<td>$67,000</td>
</tr>
<tr>
<td>Friends of Adult Day Health Care Centers</td>
<td>Minivan</td>
<td>SE</td>
<td>83</td>
<td>$45,000</td>
</tr>
<tr>
<td>Facilitating Access to Coordinated Transportation (FACT)</td>
<td>Minivan</td>
<td>SE</td>
<td>79</td>
<td>$45,000</td>
</tr>
<tr>
<td>FACT</td>
<td>Minivan</td>
<td>SE</td>
<td>79</td>
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Coordinated Plan (2014 - 2018)
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<th>Project Type</th>
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<th>Total (100 Points)</th>
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<td>Minivan</td>
<td>SE</td>
<td>79</td>
<td>$45,000</td>
</tr>
<tr>
<td>Home of Guiding Hands Corporation</td>
<td>Medium Bus</td>
<td>R</td>
<td>99</td>
<td>$67,000</td>
</tr>
<tr>
<td>Home of Guiding Hands Corporation</td>
<td>Medium Bus</td>
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<td>99</td>
<td>$67,000</td>
</tr>
<tr>
<td>Home of Guiding Hands Corporation</td>
<td>Large Bus</td>
<td>SE</td>
<td>97</td>
<td>$73,000</td>
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<tr>
<td>Home of Guiding Hands Corporation</td>
<td>Base Station (2)</td>
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<td>Large Bus</td>
<td>SE</td>
<td>97</td>
<td>$73,000</td>
</tr>
<tr>
<td>Home of Guiding Hands Corporation</td>
<td>Large Bus</td>
<td>SE</td>
<td>96</td>
<td>$73,000</td>
</tr>
<tr>
<td>Mountain Shadows Support Group</td>
<td>Modified Raised Top</td>
<td>R</td>
<td>100</td>
<td>$50,000</td>
</tr>
<tr>
<td>Mountain Shadows Support Group</td>
<td>Modified Raised Top</td>
<td>R</td>
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<td>Modified Raised Top</td>
<td>SE</td>
<td>97</td>
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<td>Medium Bus</td>
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<td>95</td>
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<tr>
<td>Mountain Shadows Support Group</td>
<td>Medium Bus</td>
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<td>95</td>
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<tr>
<td>Mountain Shadows Support Group</td>
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<tr>
<td>St. Madeleine Sophie's Center</td>
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</tr>
<tr>
<td>St. Madeleine Sophie's Center</td>
<td>Minivan</td>
<td>R</td>
<td>86</td>
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</tr>
<tr>
<td>St. Madeleine Sophie's Center</td>
<td>Minivan</td>
<td>R</td>
<td>86</td>
<td>$45,000</td>
</tr>
<tr>
<td>St. Madeleine Sophie's Center</td>
<td>Small Bus</td>
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<td>St. Madeleine Sophie's Center</td>
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</tr>
<tr>
<td>St. Madeleine Sophie's Center</td>
<td>Large Bus</td>
<td>R</td>
<td>86</td>
<td>$73,000</td>
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</table>
The goal of the JARC program is to improve access to employment and employment-related activities for welfare recipients and eligible low-income individuals and to transport residents of urbanized areas and non-urbanized areas to suburban employment opportunities (also known as a “reverse commute”).

This program provides financial assistance for transportation services planned, designed, and carried out to meet the transportation needs of eligible low-income individuals and reverse commuters regardless of income. The formula for JARC funds is based on the number of eligible low-income and welfare recipients in urbanized and rural areas. The region may use up to 10 percent of the JARC funds for planning, administration, and technical assistance.

JARC funding is allocated by formula to states for areas with populations below 200,000 persons, and to designated recipients for areas with populations of 200,000 persons and above. SANDAG serves as the designated recipient for the San Diego urbanized area, and Caltrans serves as the designated recipient for the rural areas throughout the State of California, including those in San Diego County. SANDAG and Caltrans allocate these funds on a competitive basis, based on a separate call-for-projects. All projects must be derived from the Coordinated Plan.

The JARC program requires that all projects include matching funds. For this program, funds may be matched with local or state sources or other federal funds as long as they do not come from the Department of Transportation. Allowing the use of federal matching funds encourages coordination with other programs, such as those funded by the Department of Health and Human Services. The match requirement is 50 percent for operating projects and 20 percent for capital projects.

The specific projects funded through the JARC program are shown in Table 8.1.1B.
Table 8.1.1B: JARC Programs Funded Through the Coordinated Plan

<table>
<thead>
<tr>
<th>Project</th>
<th>Agency</th>
<th>FY06</th>
<th>FY07</th>
<th>FY08</th>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>Total</th>
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<td>Employment Trans for Refugees</td>
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<td>Route 967 &amp; 968</td>
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<td>$156,375</td>
<td>$156,375</td>
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<td>$126,574</td>
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<td>Ridelink Bike Lockers</td>
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<td>$1,327,266</td>
<td>$1,593,659</td>
<td>$1,509,808</td>
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<td>$1,613,512</td>
<td>$1,690,432</td>
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</table>
FTA Section 5317 New Freedom Program

The New Freedom program aims to support new public transportation services and public transportation alternatives beyond those required by the Americans with Disabilities Act (ADA) of 1990. Examples of eligible projects include:

- Enhanced paratransit services beyond the minimum requirements of the ADA, for example, expanded service parameters beyond the three-fourths mile radius requirement or expanded hours of operation beyond those provided on the fixed-route services
- Accessibility improvements to transit and intermodal stations not designated as key stations
- Volunteer driver and aide programs
- The development and operation of one-stop transportation traveler call centers to coordinate transportation information on all travel modes, and to manage eligibility requirements and arrangements for customers among supporting programs

Similar to JARC, SANDAG is the designated recipient for the urbanized areas and Caltrans is the designated recipient for the rural areas throughout California, including those in San Diego County. New Freedom funds are required to be distributed on a competitive basis. Projects must be considered new to be eligible for funding; in this case new is defined as any service or activity that was not operational and did not have an identified funding source on August 10, 2005. The allocation of New Freedom funds through the Coordinated Plan competitive process are shown in Table 8.1.1C.
### Table 8.1.1C: New Freedom Programs Funded Through the Coordinated Plan

<table>
<thead>
<tr>
<th>New Freedom Project</th>
<th>Agency</th>
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<th>FY07</th>
<th>FY08</th>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>Total</th>
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<td>$76,500</td>
<td>$76,500</td>
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<td>Purchase lift equipped vehicle</td>
<td>All Congregations Together</td>
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<tr>
<td>Purchase lift equipped vehicle</td>
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<td>Purchase MDT/AVL Equipment for MTS Access</td>
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</table>
Veterans Transportation and Community Living Initiative

The Veterans Transportation and Community Living Initiative (VTCLI) is an innovative, federally coordinated partnership that will make it easier for United States veterans, active service members, military families, and others to learn about and arrange for locally available transportation services that connect them with work, education, health care, and other vital services in their communities. VTCLI is a discretionary grant program under SAFETEA-LU developed by the federal Coordinating Council on Access and Mobility – a federal inter-agency council including participants from the Department of Transportation, Veterans Affairs, Labor, and Health and Human Services.

The FTA released a second announcement of available funding in July 2012. SANDAG, in partnership with 2-1-1 San Diego and Full Access and Coordinated Transportation, submitted an application and was subsequently awarded $2,050,000. San Diego County’s One-Call/One-Click Partnership Projects includes technological upgrades to existing infrastructure, including hardware and software purchases, and will improve the accessibility of information for San Diego County’s transportation services through an enhanced directory of transportation referral and information resources, a one-click transportation website, 24/7 live telephone service, a free mobile transportation application for smart phones, and the installation of at least 20 interactive, auditable transportation kiosks at military facilities, VA facilities, workforce one-stops, hospitals, medical clinics, social service sites, and other locations throughout the county. The project also will track trends, needs, requests, and gaps in service which will be documented and serve as input for future updates to the Coordinated Plan.

8.1.2 Moving Ahead for Progress in the 21st Century Programs

On July 6, 2013, President Obama signed a new two-year transportation authorization law into effect, entitled MAP-21. MAP-21 focuses on a number of important goals, including public safety, state of good repair, performance, and program efficiency. One major component of the new law is the emphasis on restoring and replacing aging public transportation infrastructure, in addition to new guidelines on the continued safety of these components.

A significant change in MAP-21 includes the end of JARC and New Freedom as distinct programs. Both survive as eligible activities under MAP-21. JARC-type projects remain as eligible activities under the rural (Section 5311) and urban (Section 5307) formula funding programs while New Freedom-type projects are now an allowable expense under Section 5310. The legislation allows Metropolitan Planning Organizations to take over the administrative responsibility for the Section 5310 program as the Designated Recipient. Following the Governor’s approval in May 2014, SANDAG assumed the administrative responsibility for the Section 5310 program under MAP-21. The objectives and program measures for the new Section 5310 program will be included in the next Coordinated Plan update.

Since JARC is no longer available to fund transportation projects sponsored by nonprofit and social service organizations, critical projects that were previously subsidized by the Department of Transportation are now at risk. SANDAG will work with these agencies and stakeholders towards
developing innovative funding solutions so that these agencies can continue to address the special needs of the low-income population.

The following programs have either been modified or maintained under the new surface transportation bill, MAP-21.

**FTA Section 5307 Urbanized Area Formula Program**

The Urbanized Area Formula Program makes federal resources available to urbanized areas for transit capital and operating assistance and for transportation-related planning. An urbanized area is an incorporated area with a population of 50,000 or more that is designated as such by the Census Bureau. Eligible activities include planning, engineering, design, and evaluation of transit projects and other technical transportation-related studies, capital investments in bus and bus-related activities, and capital investments in new and existing fixed guideway systems. For urbanized areas with populations less than 200,000, operating assistance is an eligible expense.

As mentioned above, under the new surface transportation bill, MAP-21, activities once eligible under Section 5316 (JARC) are now eligible under Section 5307, which provides significant support to transit operations. This includes operating assistance with a 50 percent local match for JARC-related activities. Additionally, the urbanized area formula used for distributing funds now includes the number of low-income individuals as a factor. With the incorporation of Section 5316 into Section 5307, there is no minimum or maximum on the amount of funds that can be spent on job access and reverse commute activities.

Because the San Diego urbanized area has a population larger than 200,000, the Section 5307 program does not provide assistance for operating costs such as operator salaries and overhead, but based on the need to maintain federally funded assets, this program enables transit agencies to use their Section 5307 apportionments to pay the cost of maintaining those assets. The provision, called preventive maintenance, allows the transit operators to recover up to 80 percent of their total maintenance costs from this source. This provision is applicable to all modes; however, use of these funds for this purpose is likely to be at the expense of funding ongoing capital needs, such as bus and other equipment replacements. Starting in FFY 2012, the FTA included fuel costs (including utility costs for the population of electric vehicles) as an eligible capital maintenance item for FFY 2012 under the Section 5307 Urbanized Area Formula Program.

Two other special provisions under Section 5307 may be employed to direct these capital funds toward operations: the Capital Cost of Contracting and ADA Services provisions. Capital Costs of Contracting allows the transit agencies to use the Section 5307 funds to pay a portion of costs of operating contracts based on the amount of capital being provided by the contractor. The proportions vary based on the type of contract and whether the contractor provides vehicles. The transit agencies may pay up to 80 percent of the ADA operating contracts with Section 5307 funds instead of using those funds for ongoing capital needs. Funds apportioned by the FTA under the Urbanized Area Formula Program remain available to the recipient for four fiscal years—the year of the apportionment, plus three additional years.
SANDAG is the designated recipient of the Section 5307 funds and allocates these funds to the transit agencies after a portion is set aside for SANDAG planning purposes. SANDAG policy has been to allocate 70 percent of the remaining funds to Metropolitan Transit System (MTS) and 30 percent to the North County Transit District (NCTD). Section 5307 funding for prior years and projected years are included in Appendix B, Table B.11.

FTA Section 5309 Fixed Guideway

This federal formula program is available to Fixed Guideway agencies with systems in operation for at least seven years. The term “Fixed Guideway” refers to any transit service that uses exclusive or controlled rights-of-way or rails, entirely or in part. The term includes heavy rail, commuter rail, light rail, trolleybus, aerial tramway, inclined plane, cable car, automated guideway transit, ferryboats, that portion of motor bus service operated on exclusive or controlled rights-of-way, and high occupancy vehicle lanes. These program funds must be used only for fixed guideway projects, including preventive maintenance. These funds require a nonfederal match of 20 percent to the federal 80 percent contribution.

Like Section 5307 funds, Fixed Guideway Modernization funds are authorized under SAFETEA-LU and are appropriated annually by Congress. FTA apportions these funds to the regions based on a complex tiered formula using various factors including revenue-miles and route-miles. SANDAG allocates these funds to MTS and NCTD using the same 70/30 distribution as described in Section 5307. Section 5309 Fixed Guideway funding for prior and projected years are included in Appendix B, Table B.11.

FTA Section 5310 Formula Funds for Enhanced Mobility for Seniors and Individuals with Disabilties

Section 5310 funds under MAP-21 are intended to increase the mobility of seniors and persons with disabilities. The program has been modified such that projects once eligible under New Freedom are now eligible for funding under Section 5310. Projects must be included in the Coordinated Plan to be eligible for funding. Funds are apportioned to either states (for all areas under 200,000) or large urbanized areas (over 200,000) and are based on each geography’s share of the targeted populations.

At least 55 percent of the program funds must be spent on capital projects that would have been eligible under the former Section 5310 program—“public transportation projects planned, designed, and carried out to meet the special needs of seniors and individuals with disabilities when public transportation is insufficient, inappropriate, or unavailable”. The remaining 45 percent may be allocated for: “public transportation projects that exceed the requirements of the ADA; public transportation projects that improve access to fixed-route service and decrease reliance by individuals with disabilities on complementary paratransit; or alternatives to public transportation that assist seniors and individuals with disabilities.” A local match is required for each project: 50 percent local match for operating expenses and 20 percent local match for capital expenses.
FTA Section 5311 Non-Urbanized Area Formula Funds

Whereas Section 5307 funds urbanized areas over 50,000 people, Section 5311 provides capital, planning, and operating assistance for public transportation in non-urbanized (or rural) areas according to a statutory formula based on each state’s population in rural and urbanized areas. In California, Caltrans allocates the Section 5311 funds to counties on a rural population basis. NCTD receives 59 percent of the funding and MTS receives 41 percent. These funds may be used for operations requiring a dollar-for-dollar match. They may be used for capital at an 80/20 federal to nonfederal ratio. Section 5311 funding for prior and projected years are included in Appendix B, Table B.11.

FTA Section 5311(f) Intercity Bus Program

A subsidiary program under the Section 5311 program, the Section 5311(f) program was created to help provide an intercity bus transportation system designed to address the intercity bus transportation needs of the entire state by providing financial assistance for operating, capital, and/or planning grants that support three national objectives:

- To support the connection between non-urbanized areas and the larger regional or national system of intercity bus service
- To support services to meet the intercity travel needs of residents in non-urbanized areas
- To support the infrastructure of the intercity bus network through planning and marketing assistance and capital investment in facilities

This program, while discretionary, is included in this list of recurring sources because the region’s two transit agencies have been successful in obtaining these funds from Caltrans to support rural operations and capital needs.

Congestion Mitigation and Air Quality Program

Administered by the Federal Highway Administration, these funds can be used for transit capital projects and for certain operating expenses. The Congestion Mitigation and Air Quality (CMAQ) program provides funding for projects or services that contribute to the attainment or maintenance of federal air quality standards. Transit operators are not the only agencies that qualify for these grants and there can be stiff competition for these funds. Previous federal legislation allowed transit agencies to use CMAQ for operating purposes for the first three years of start-up service. SAFETEA-LU implementation guidelines, however, no longer allow this eligibility for New Starts-funded projects. Through 2008, MTS received a total of $37 million for the Green Line Trolley ($20.2 million for construction and $16.8 million for operations) while NCTD has received $20.9 million ($4.9 million for construction and $16 million for operations) for the SPRINTER light rail project. CMAQ funding was allocated to the SPRINTER in the following increments per fiscal year: FY 2005/2006, $4.9 million; FY 2007/2008, $6 million; FY 2008/2009, $4 million; and FY 2009/2010, $6 million. For the Trolley Green Line, CMAQ funding was allocated per year at the following levels: pre-1993, $2.6 million; FY 1992/1993, $1.8 million; FY 1996/1997, $5.9 million;

Surface Transportation Program

The Surface Transportation Program (STP) is primarily designed to support road and highway projects. Despite this, under the flexible funding rules this program can be applied to transit, but there may be strong competition for these funds. SANDAG transfers both STP and CMAQ dollars to FTA in order to fund coastal rail projects.

8.2 State

State funding sources generally include motor fuel taxes, special fuel taxes, vehicle registration fees, and driver’s license fees. State funding for transit projects are available through the STIP and more recently through the state Proposition 1A (Constitutional protections for transportation funding) and 1B (Transportation Bond) approved by the voters in 2006. In addition to the STIP, the State Transit Assistance (STA) is funded with 50 percent of the Public Transit Account revenues. Vehicle registration fee money also is available as a potential funding source according to Assembly Bill 2766 (AB 2766) (Sher, 1990). AB 2766 allows an Air Pollution Control District (APCD) to collect a $6 motor vehicle registration fee surcharge, of which 40 percent of $4 is diverted to implement projects that reduce mobile source emissions. The San Diego APCD recently increased this fee from $2 to $4 as allowed under AB 2766 (effective October 1, 2009). A future increase to $6 could be implemented to provide additional support for public transit.

State Transportation Improvement Program

The STIP includes both the Regional Improvement Program (RIP) and the Interregional Improvement Program (IIP). The RIP is allocated by County based on a formula, while the IIP is allocated based on a competitive process administered by the CTC. SANDAG proposes all projects under the RIP, while Caltrans is responsible for the IIP, and proposes those projects in consultation with SANDAG. STIP funds only may be used for capital expenses and not operating costs. Although major highway projects have been recipients of STIP funds, regional transit projects, such as Mid-Coast, Fare Technology, and other regional rail projects also have received funding. The projects and their funding levels that have received RIP and IIP funds are available at: www.catc.ca.gov/programs/stip.htm.

STA and ABX8-6 and ABX8-9

The STA program provides funding for allocation to local transit agencies to fund a portion of the operations and capital costs associated with local mass transportation programs. STA funding has changed over the past few years. The State Controller’s office is responsible for providing the estimates in January of each year. Based on the FY 2015 preliminary estimate, $23,539,059 is available to the San Diego region. Pursuant to ABx8-6 (March 2010), STA allocations are based on sales tax generated from consumption of diesel fuel. We have four years of historical data under this new legislation. However, as diesel fuel consumption tends to fluctuate, and given that in the
past four years the apportionment has declined each year, a forecast of STA funding is not provided as there is no good basis to estimate future projections.

Assembly Bills ABX8-6 and ABX8-9 included the following major provisions:

- Repeal the sales tax on gasoline.
- Increase the excise tax on gasoline by 17.3 cents and add an annual index that will ensure that the new excise tax will keep pace with the revenues expected from the sales tax on gasoline.
- Increase the sales tax on diesel by 1.75 percent and allocate 75 percent to local transit agencies and 25 percent to state transit programs beginning in FY 2011 to 2012. The legislation also reduced the excise tax on diesel from 18 cents to 13.6 cents to maintain revenue neutrality.
- Temporarily suspends STA efficiency criteria after January 1, 2010, through FY 2011 to 2012 to ensure that STA funds can be used for operations. (The criteria suspension is continued through FY 2015 per Senate Bill 565).

8.3 Local

Local funds include monies from the regional sales tax for transportation (TransNet), the Transportation Development Act (TDA), transit fares, and other miscellaneous local funds such as advertising revenue and some related commercial activities such as concessions and real estate development. In addition, SANDAG conducted a comprehensive analysis of other potential regional and local revenue sources for transit operations, and included those findings in the “Transit Impediments Study” in 2009. These sources include the creation of assessment districts, levying fees, or taxes, which have been pursued by other regions or in other jurisdictions at the local level. Consideration of these possible solutions and alternatives generates a number of policy questions; the answers to some of which may require changes in state and/or federal law. These solutions offer ancillary funding streams or could potentially replace the need for a sales tax initiative. Additionally, Table 8.7 provides further details on these alternatives relative to potential funds generated, implementation authority, approval requirements, geographic applicability, and ease of administration.

The process to implement the local revenue mechanisms would be dictated to a large extent by the purpose and administration of the funds. As required by Proposition 218, any tax that is collected for a special purpose (e.g., for transportation infrastructure or transit services), as the proposals in this report would be, is defined as a “special tax” subject to the two-thirds voter supermajority approval. Funding mechanisms based on real property that are structured as “fees” to pay for specific improvements or services could be implemented as a simple local city or county regulation. If a portion of these fees exceeds the reasonable cost of these improvements or services, however, then the “fee” would actually be a “tax” subject to a two-thirds voter supermajority approval.
TransNet and the Senior Transportation Mini-Grant Program

Since 1988 TransNet, the half-cent sales tax dedicated for local transportation projects, has been instrumental in expanding the transportation system, reducing traffic congestion, and advancing critical transit projects. In November 2004, 67 percent of the county's voters approved a 40-year extension of TransNet (to 2048), which is expected to generate an additional $14 billion (in 2008 dollars) for public transit, highway, and local street road improvements.

The TransNet Ordinance prescribes funding for specific programs through the 40 years including 16.5 percent of the annual TransNet revenues dedicated for transit purposes, the majority of which is allocated by population to the two transit operators. Of the 16.5 percent of revenues, 94.25 percent can be used for either capital or operating needs, while 2.5 percent is designated toward the ADA compliance. The remaining 3.25 percent is reserved for a competitive program to provide transportation services administered by SANDAG, the TransNet Senior Mini-Grant Program.

As stated by the TransNet Extension Ordinance, the TransNet Senior Mini-Grant program is intended to improve mobility for seniors throughout the county by funding innovative and cost-effective specialized transportation services for older adults including, but not limited to, shared group services, senior shuttles, volunteer driver programs, travel training, and the brokerage of multijurisdictional transportation services. The allocation of Senior Mini-Grant funds through the Coordinated Plan competitive process are shown in Table 8.4.

In addition to the 16.5 percent of TransNet reserved for transit capital and operating, 8.1 percent of all annual TransNet revenues are set aside for operating costs of specific new services developed with capital investment from the TransNet Major Corridors program as specified in the TransNet Expenditure Plan.
Table 8.4: Senior Mini-Grant Programs Funded Through the Coordinated Plan

<table>
<thead>
<tr>
<th>Senior Mini-Grant</th>
<th>Project Agency</th>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
<th>Total</th>
</tr>
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<tr>
<td>ComLink Transportation</td>
<td>All Congregations Together</td>
<td>$158,877</td>
<td>$174,783</td>
<td>$187,073</td>
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<td>Senior Transportation Program</td>
<td>Alpha Project</td>
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<td>$195,806</td>
<td>$195,806</td>
<td>$116,462</td>
<td>$173,838</td>
<td>$176,711</td>
<td>$176,711</td>
<td>$884,910</td>
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<td>Rides4Neighbors</td>
<td>City of La Mesa</td>
<td>$80,000</td>
<td>$80,000</td>
<td>$80,000</td>
<td>$98,936</td>
<td>$97,280</td>
<td>$90,980</td>
<td>$99,055</td>
<td>$732,188</td>
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<td>Solutions for Seniors on the Go</td>
<td>City of Oceanside</td>
<td>$105,456</td>
<td>$234,131</td>
<td>$299,328</td>
<td>$198,300</td>
<td>$47,695</td>
<td>$476,682</td>
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<tr>
<td>Out &amp; About Vista</td>
<td>City of Vista</td>
<td>$76,464</td>
<td>$95,912</td>
<td>$99,025</td>
<td>$101,720</td>
<td>$103,561</td>
<td>$732,188</td>
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<tr>
<td>Volunteer Driver Program</td>
<td>ElderHelp</td>
<td>$117,421</td>
<td>$111,110</td>
<td>$117,406</td>
<td>$98,936</td>
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<tr>
<td>Senior Ride Reimbursement</td>
<td>FACT</td>
<td>$24,000</td>
<td>$42,240</td>
<td>$59,040</td>
<td>$20,000</td>
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<tr>
<td>MedRide</td>
<td>FACT</td>
<td>$9,000</td>
<td>$56,000</td>
<td>$63,505</td>
<td>$30,000</td>
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<tr>
<td>MedAccessRide</td>
<td>FACT</td>
<td>$9,000</td>
<td>$56,000</td>
<td>$63,505</td>
<td>$30,000</td>
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<tr>
<td>RideFACT Brokerage Services</td>
<td>FACT</td>
<td>$20,000</td>
<td>$20,000</td>
<td>$20,000</td>
<td>$20,000</td>
<td>$20,000</td>
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<tr>
<td>Mobility Management</td>
<td>FACT</td>
<td>$20,000</td>
<td>$20,000</td>
<td>$20,000</td>
<td>$20,000</td>
<td>$20,000</td>
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<tr>
<td>ITNRides</td>
<td>ITN San Diego</td>
<td>$75,000</td>
<td>$76,464</td>
<td>$79,363</td>
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<td>$200,000</td>
<td>$222,049</td>
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<tr>
<td>Rides &amp; Smiles - Northern San Diego</td>
<td>Jewish Family Services</td>
<td>$42,144</td>
<td>$43,877</td>
<td>$45,680</td>
<td>$42,377</td>
<td>$47,167</td>
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<tr>
<td>Rides &amp; Smiles - North County Inland and Eastern San Diego</td>
<td>Jewish Family Services</td>
<td>$42,144</td>
<td>$43,877</td>
<td>$45,680</td>
<td>$42,377</td>
<td>$47,167</td>
<td>$221,245</td>
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<tr>
<td>Mobility/Travel Training</td>
<td>NCTD</td>
<td>$32,465</td>
<td>$33,857</td>
<td>$66,322</td>
<td>$32,465</td>
<td>$33,857</td>
<td>$66,322</td>
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<td>Volunteer Driver Program</td>
<td>Peninsula Shepherd Center</td>
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<td>$33,857</td>
<td>$66,322</td>
<td>$32,465</td>
<td>$33,857</td>
<td>$66,322</td>
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<tr>
<td>Out &amp; About Escondido</td>
<td>Redwood Elderlink</td>
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<td>$120,054</td>
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<tr>
<td>SeniRide</td>
<td>Travelers Aid Society</td>
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<td>$33,857</td>
<td>$66,322</td>
<td>$32,465</td>
<td>$33,857</td>
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<tr>
<td>Purchase and operate medium bus</td>
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<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
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<tr>
<td>Door-through-door transportation</td>
<td>Friends of Adult Day Healthcare Centers</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
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<tr>
<td>Senior Nutrition Program</td>
<td>Redwood Elderlink</td>
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<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
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<tr>
<td>Transportation, Translation and Advocacy</td>
<td>Bayside Community Center</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
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<td></td>
<td></td>
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<tr>
<td>Volunteer Driver Program</td>
<td>Mountain Health and Community Services</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
<td>$57,600</td>
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Total $1,268,557 $1,148,333 $1,257,305 $1,127,026 $1,191,394 $1,450,847 $1,404,000 $8,789,862
The Mills-Alquist-Deddeh Act (Senate Bill 325) was enacted by the California Legislature to improve existing public transportation services and encourage regional transportation coordination. Known as the TDA of 1971, this law provides funding to be allocated to transit and nontransit-related purposes that comply with regional transportation plans. The TDA provides two funding sources including the STA, described previously, and the Local Transportation Fund (LTF), which is derived from a quarter cent of the general sales tax collected statewide. The State Board of Equalization, based on sales tax collected in each county, returns the general sales tax revenues to each county’s LTF.

TDA comprises the largest source of subsidy for the San Diego region’s transit operators and for nonmotorized transportation projects. TDA funds may be used for a wide variety of transportation programs, including operations, planning and program activities, pedestrian and bicycle facilities, community transit services, public transportation, and bus and rail projects. Providing certain conditions are met, counties with a population under 500,000 also may use the LTF for local streets and roads, construction, and maintenance.

SANDAG, as the Regional Transportation Planning Agency, is responsible to release the apportionment of TDA funds each year in conformance with state statute. The transit operators and other member agencies submit their annual TDA claims based on the annual apportionment and in compliance with SANDAG Board Policy No. 027: TDA Administration Policy. Pursuant to state statute, the County of San Diego Auditor and Controller office has the responsibility for providing the TDA apportionment prior to February 1 for the upcoming fiscal year. The County Auditor develops the apportionment in consultation with SANDAG staff. SANDAG is required to notify prospective claimants of the apportionment by March 1 of each year.

The legislative priorities established by state law include certain categories for which TDA funds are taken “off the top.” These include the allocation to SANDAG for various planning, programming, and administrative-related expenses, funding of bicycle and pedestrian facilities, and support of community transit services (see below discussion). In addition, the County Auditor receives an allocation based on estimates of its costs to administer the TDA program. The remaining apportionment, along with prior year carryover funds, is available to be claimed by the two transit operators.

Pursuant to state statute, support of community transit services comprise five percent of the annual TDA apportionment (TDA Section 4.5), which include services for those such as persons with disabilities who cannot otherwise use conventional transit services. Eligible applicants are cities, counties, public transit operators, and the Consolidated Transportation Services Agency (CTSA). According to SANDAG Board Policy No. 027, 5 percent of the total available under TDA Section 4.5 is set aside to support the CTSA, currently designated as FACT. In recent history, this amount has been approximately $100,000 per year. The remaining funds in this section are divided between MTS and the NCTD service areas based on the ratio of the total population in each area to support their respective ADA paratransit services. A summary of the FY 2013 TDA claims is shown in Table 8.6.
Fares

SANDAG is responsible for the setting of fares on the transit services in the San Diego region through the Regional Comprehensive Fare Ordinance. Since 2007, SANDAG periodically has increased fares upon request by the transit agencies. In addition, SANDAG developed a Regional Comprehensive Fare Study, with the original goal of achieving a single, simplified, equitable structure for both operators. SANDAG has worked to implement this simplified structure with the most recent Fare Ordinance amendment passed and adopted in December 2011.

It also is recognized that there are clear limitations on raising fares, and there are market forces that need to be carefully considered. It should be emphasized that fare increases are not easily accomplished, and that modification to fare policy will not by itself change the dynamics of the situation facing public transit in this region.

Tolls

The existing and future express lane programs on regional freeways including Interstate 15 (I-15), Interstate 805 and Interstate 5 are designed to allow surplus revenues from the roadway to be used to support transit services. Currently, excess capacity on the I-15 is made available to Single Occupancy Vehicles for a fee administered by the FasTrak® program. After paying for administration of the FasTrak program, remaining funds are made available to fund transit services in the corridor. To date, MTS (the transit operator on this corridor) has received over $10 million in surplus revenue generated by the existing I-15 Fastrak program. The annual amount made available for transit does vary based on the tolls generated by the express lanes and related costs. The SANDAG Board has committed to providing $500,000 per year for I-15 transit services and evaluates revenue performance part way through each year to determine if there is sufficient net revenue to pass through an additional $500,000.

APCD Quality Improvement Fund

The County of San Diego's APCD funding for the Sorrento Valley COASTER Connection services ended effective June of 2008; however, the APCD continues to provide funding for juror transit passes.

Caltrans Mitigation Funds

In special cases where highway construction creates additional congestion, some special funding has been available to transit operators to pay for additional transit services. Temporary mitigation funding may be available for future highway projects.
### Table 8.6: Transportation Development Act FY 2013 Claims Summary

<table>
<thead>
<tr>
<th></th>
<th>FY 2015</th>
<th>Estimate</th>
<th>FY 2016 ($) (000s)</th>
<th>Estimate</th>
<th>FY 2017 ($) (000s)</th>
<th>Estimate</th>
<th>FY 2018 ($) (000s)</th>
<th>Estimate</th>
<th>FY 2019 ($) (000s)</th>
<th>Estimate</th>
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</thead>
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<tr>
<td></td>
<td>(mid-range)</td>
<td>Low</td>
<td>(mid-range)</td>
<td>Low</td>
<td>(mid-range)</td>
<td>Low</td>
<td>(mid-range)</td>
<td>Low</td>
<td>(mid-range)</td>
<td>Low</td>
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<td>Total Apportionment1,2</td>
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<td>$135,124</td>
<td>$147,176</td>
<td>$140,676</td>
<td>$154,564</td>
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<tr>
<td>Less County Auditor Expenses (PUC 99233:1)</td>
<td>(49,000)</td>
<td>(50)</td>
<td>(50)</td>
<td>(51)</td>
<td>(51)</td>
<td>(52)</td>
<td>(52)</td>
<td>(53)</td>
<td>(53)</td>
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</tr>
<tr>
<td>Less SANDAG Administration (PUC 99233:1)3</td>
<td>(442,156)</td>
<td>(620)</td>
<td>(621)</td>
<td>(484)</td>
<td>(486)</td>
<td>(503)</td>
<td>(505)</td>
<td>(711)</td>
<td>(713)</td>
<td></td>
</tr>
<tr>
<td>Less 2% Bicycle/Pedestrian Funds (PUC 99233:3)</td>
<td>(2,534,850)</td>
<td>(2,631)</td>
<td>(2,505)</td>
<td>(2,737)</td>
<td>(2,611)</td>
<td>(2,844)</td>
<td>(2,718)</td>
<td>(2,984)</td>
<td>(2,858)</td>
<td></td>
</tr>
<tr>
<td>Less 5%Community Transit Service (PUC 99233:7)</td>
<td>(6,213,833)</td>
<td>(6,448)</td>
<td>(6,139)</td>
<td>(6,709)</td>
<td>(6,400)</td>
<td>(6,972)</td>
<td>(6,652)</td>
<td>(7,313)</td>
<td>(7,004)</td>
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<tr>
<td>Total Available for MTS</td>
<td>83,724,703</td>
<td>86,896</td>
<td>82,730</td>
<td>90,406</td>
<td>86,239</td>
<td>93,051</td>
<td>89,784</td>
<td>98,351</td>
<td>94,384</td>
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</tr>
<tr>
<td>Less Regional Planning/Capital Projects4</td>
<td>0</td>
<td>(492)</td>
<td>(492)</td>
<td>(192)</td>
<td>(192)</td>
<td>(192)</td>
<td>(192)</td>
<td>(192)</td>
<td>(192)</td>
<td></td>
</tr>
<tr>
<td>Less Transferred Functions5</td>
<td>(1,666,060)</td>
<td>(1,750)</td>
<td>(1,666)</td>
<td>(1,821)</td>
<td>(1,737)</td>
<td>(1,892)</td>
<td>(1,808)</td>
<td>(1,985)</td>
<td>(1,901)</td>
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<tr>
<td>Total Community Transit Service</td>
<td>4,320,228</td>
<td>4,484</td>
<td>4,269</td>
<td>4,663</td>
<td>4,450</td>
<td>4,848</td>
<td>4,833</td>
<td>5,085</td>
<td>4,870</td>
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<tr>
<td></td>
<td>$88,358,869</td>
<td>$90,128</td>
<td>$84,841</td>
<td>$93,050</td>
<td>$88,761</td>
<td>$96,715</td>
<td>$92,417</td>
<td>$101,460</td>
<td>$97,162</td>
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<tr>
<td>Total Available for NCTD</td>
<td>34,270,133</td>
<td>35,568</td>
<td>33,863</td>
<td>37,005</td>
<td>35,299</td>
<td>38,456</td>
<td>36,750</td>
<td>40,339</td>
<td>38,633</td>
<td></td>
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<tr>
<td>Less Transferred Functions5</td>
<td>(574,025)</td>
<td>(596)</td>
<td>(567)</td>
<td>(620)</td>
<td>(591)</td>
<td>(644)</td>
<td>(516)</td>
<td>(576)</td>
<td>(547)</td>
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<tr>
<td>Total Community Transit Service</td>
<td>1,788,351</td>
<td>1,835</td>
<td>1,747</td>
<td>1,909</td>
<td>1,821</td>
<td>1,984</td>
<td>1,896</td>
<td>2,081</td>
<td>1,993</td>
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<tr>
<td></td>
<td>$35,126,441</td>
<td>$35,998</td>
<td>$34,233</td>
<td>$37,421</td>
<td>$35,656</td>
<td>$39,067</td>
<td>$37,303</td>
<td>$41,089</td>
<td>$39,324</td>
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<td>1,302</td>
<td>1,066</td>
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<td>920</td>
<td>920</td>
<td>847</td>
<td>847</td>
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<tr>
<td>Transferred Functions</td>
<td>2,260,883</td>
<td>2,346</td>
<td>2,233</td>
<td>2,449</td>
<td>2,328</td>
<td>2,536</td>
<td>2,424</td>
<td>2,660</td>
<td>2,548</td>
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<tr>
<td>SANDAG Expenses</td>
<td>442,156</td>
<td>620</td>
<td>621</td>
<td>484</td>
<td>486</td>
<td>503</td>
<td>505</td>
<td>711</td>
<td>713</td>
<td></td>
</tr>
<tr>
<td>3% Planning Funds</td>
<td>3,919,872</td>
<td>4,068</td>
<td>3,873</td>
<td>4,233</td>
<td>4,038</td>
<td>4,399</td>
<td>4,204</td>
<td>4,614</td>
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<tr>
<td>Prior Year Carryover</td>
<td>3,450,517</td>
<td></td>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Total Available to Claim</td>
<td>$10,428,648</td>
<td>$8,336</td>
<td>$8,030</td>
<td>$8,223</td>
<td>$7,917</td>
<td>$8,358</td>
<td>$8,053</td>
<td>$8,833</td>
<td>$8,527</td>
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<tr>
<td>Total Community Transit Service (CTSA)</td>
<td>$124,257</td>
<td>$129</td>
<td>$123</td>
<td>$134</td>
<td>$128</td>
<td>$139</td>
<td>$133</td>
<td>$146</td>
<td>$140</td>
<td></td>
</tr>
<tr>
<td>Prior Year Carryover</td>
<td>$10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Available to Claim</td>
<td>$124,257</td>
<td>$129</td>
<td>$123</td>
<td>$134</td>
<td>$128</td>
<td>$139</td>
<td>$133</td>
<td>$146</td>
<td>$140</td>
<td></td>
</tr>
</tbody>
</table>

*Totals may not add up due to rounding.

1 The County Auditor provided the apportionment for FY 2015. The projected estimates for FY 2016 to FY 2019 are based on the growth rate in retail sales as forecasted by SANDAG and excludes interest and prior year excess funds. The low range is based on the 95% confidence interval of $6.5M per year.

2 Apportionment distribution is based on the population estimates published by the California Dept of Finance (DOF) estimates as of January 2013 - approximately 71% for MTS and 29% for NCTD.

3 The SANDAG Administration cost rates in FY 2016 and in FY 2019 disproportionately due to costs associated with the triennial performance audit. All other annual increases in SANDAG administrative costs are consistent with the historical cost in the TDA.

4 Represents the local match for federally funded regional planning and transit capital development projects identified in the FY 2015 transit CIP as provided by MTS and NCTD. The projects funded are scheduled to be included as part of the FY 2015 Capital Improvement Program scheduled for Transportation Committee/Board action at their March meetings. As a result, this amount is subject to change.

5 Based on Addendums No. 3 and No. 4 to the Master Memorandum of Understanding between MTS, NCTD, and SANDAG. For NCTD, 26.09% of this share is transferred back to NCTD to be used for TDA-eligible purposes.
Other Potential Regional and Local Revenue Sources Explored in the SANDAG “Transit Impediments Study”

Other solutions to finding new sources of money also were evaluated based on their potential application as regional funding measures and were included in the Transit Impediments Study (SANDAG, 2009). These include the creation of assessment districts, levying fees, or taxes, which have been pursued by other regions or in other jurisdictions at the local level. Consideration of these possible solutions and alternatives generates a number of policy questions; the answers to some of which may require changes in state and/or federal law. These solutions offer ancillary funding streams or could potentially replace the need for a sales tax initiative. Additionally, Table 8.7 provides further details on these alternatives relative to potential funds generated, implementation authority, approval requirements, geographic applicability, and ease of administration.

VEHICLE LICENSE FEES

Another funding source is increased revenues through the increase in annual vehicle registration fees. AB 2766 allows an APCD to collect a $6 motor vehicle registration fee surcharge, of which 40 percent of $4 is diverted to implement projects that reduce mobile source emissions. The San Diego APCD recently increased this fee from $2 to $4 as allowed under AB 2766 (effective October 1, 2009). These funds typically are used for projects and programs that reduce emissions, including transit services (the Sorrento Valley COASTER Connection services were funded, in part, by the APCD through FY 2008). With the increase to $4, transit projects may be eligible to compete for these funds.

TRANSIT CENTER USER FEES

Parking structures and other facilities located at premium, rapid bus, and rail stations often are at or near capacity. A potential revenue source would be to establish user fees at these facilities. While user fees can help manage the use where parking supply is constrained relative to demand, care must be exercised to develop a fee structure that does not discourage use of the bus or rail service to the point that it significantly reduces ridership. Based on a daily flat parking fee of $3 levied on weekday nontransit passholders (assuming current parking occupancy), this type of fee could generate in the range of $1 million per year (existing number of park-and-ride spaces) to $2 million per year (future parking spaces included in the 2030 Regional Transportation Plan). SANDAG and the transit agencies currently have the authority to implement user fees. This would require a new program structure to administer since no fees are currently collected.

PARCEL TAXES

Property taxes on land and building values are generally the principal source of revenue for local governments. Portions of local property taxes are authorized widely for use by special districts and authorities, including transit agencies and school districts. Unlike real estate transfer taxes (discussed below), property taxes can provide an annual versus one-time funding source for public transit. Traditionally, support for public transportation has been derived from sources other than
property tax to avoid competition with other basic public services, such as health, education, police, and fire protection. With existing sources of transit funding being reduced or eliminated, parcel tax assessments for transit could provide a valuable tool to reduce the gap between operating costs and revenues. Based on a range of $50 to $100 assessed on each parcel, this type of tax could generate between $35 and $70 million for transit operations. Local jurisdictions have the authority to implement a parcel tax, but it would require two-thirds voter supermajority approval. The existing programmatic structure in place could be used to collect such a tax should it be levied in the County.

TRANSIT-ORIENTED DEVELOPMENT/JOINT DEVELOPMENT

Transit-Oriented Development (TOD) and joint development around transit stations can benefit transit systems by increasing the number of residents and/or employees with walk access to rail and bus services, along with potential revenues through sale/lease of transit station rights-of-way/air rights. This strategy has been used successfully at several rail stations in the San Diego region, and is being factored into the development of future rail and bus rapid transit lines outlined in the 2050 Regional Transportation Plan. Another related option for funding sources is the sale or lease of property or air rights. As the land values continue to rise, especially along the coast, and as transportation facilities and routes are developed along coastal corridors, the sale or lease of air rights will be an attractive income opportunity for transit operators and agencies. While the cost of construction may be considerably higher, the high land value secures reasonable economic feasibility.

PAYROLL TAXES

A transit payroll tax involves a tax imposed directly on an employee or employer based on gross wages regardless of whether the employee uses transit or not. In Portland, Oregon a payroll tax is levied by the Tri-County Metropolitan Transportation District (TriMet) and the Lane County Mass Transit District, while a similar payroll tax is levied by the New York Metropolitan Transit Authority (MTA). Unlike a commuter benefits ordinance which has the advantage of encouraging public transit ridership, a payroll tax has the potential to cover unsubsidized gaps in operating costs and revenues. Existing legislation may allow cities in San Diego County to institute a type of tax known as an “occupation” tax, which is a tax on employees rather than employers (as is the case under the Portland TriMet and New York MTA payroll taxes). Where similar payroll tax percentages were applied countywide under the “occupation” tax using the 0.34 percent TriMet and 0.66 percent New York MTA examples, this type of funding source could generate in the range of $175 to $340 million for transit operations. Such a tax would require two-thirds (2/3) voter approval to implement.

RENTAL CAR FEES

Rental car fees, more commonly found in rental agreements that originate at airports, are levied in jurisdictions across the United States. While these fees are sometimes used to pay for facilities directly associated with the airport (parking structures or new terminals, for example) some jurisdictions levy these fees to pay for facilities that are not associated with airport improvements,
such as stadium expansions or renovations. An option would be to establish rental car fees that provide funding for transit system operations as mitigation for their contribution to congestion on the local street and highway network. These rental car fees could be extended to rental car agreements originating at locations other than airports. SANDAG does not have the authority to impose rental car fees, and so new legislation would be required to allow SANDAG or any local jurisdiction to impose such a fee for transit operations. If legislative changes were implemented and rental car fees were imposed at a rate of one percent to five percent (based on a recent New York MTA rental car fee of 5 percent), between $2 million and $10 million could be generated for transit operations.

**BENEFIT ASSESSMENT DISTRICTS**

Benefit assessment districts allow a public agency to construct and maintain improvements, such as traffic signals, parks, and others. Project costs are assessed within the boundaries of the designated benefit area of the county or city. Benefit assessment districts have several advantages: they tie financing of specific projects to beneficiaries; they allow different levels of infrastructure and services to vary with different demands for these public goods; and they allow an area that wants better infrastructure the ability to fund desired improvements itself. There are certain disadvantages, however, including potential fragmentation of infrastructure and services varying between those areas that want to pay for the improvements and those that do not. Local jurisdictions have the authority to create benefit assessment districts. A nexus study and local agency approval would be required and would require a new program structure to administer.

**PARKING ASSESSMENT DISTRICTS**

Parking assessment districts would allow the region to assess fees on certain parking spaces within defined areas. A surcharge or fee on parking spaces through parking assessment districts in congested areas, such as downtown San Diego or other major employment centers, would help raise additional revenue and reduce traffic congestion. Local jurisdictions have the authority to create parking assessment districts, but a nexus study and local agency approval is required. Additionally, any new assessment district would require a new program structure to administer.

**DEVELOPMENT IMPACT FEES AND EXACTIONS**

Development Impact Fees (DIF) are fees collected by local agencies to grant development permits that are tied to certain infrastructure improvements. The DIF also could be a vehicle to fund regional transportation mitigation projects. An analysis of these options must include recognition that DIFs may be opposed by the development community as additional fees would increase their cost of doing business. Public agencies also may find it hard to bond against projected DIF revenue, since the revenues materialize only once the development is implemented. DIFs currently can only be applied to transit capital expenses and not operating expenses. Local jurisdictions have the authority under the Mitigation Fee Act to impose a fee for transit capital, but new legislation would be required to allow the funding to be used for transit operations.
COMMUNITY FACILITIES DISTRICTS

Community Facilities Districts (CFDs) are allowed under the provisions of California Government Code Section 53311 (known as the “Mello-Roos Community Facilities Act of 1982). Districts formed under this act are more commonly referred to as “Mello-Roos” districts, community facilities districts, or CFDs. The act allows public agencies and cities to form a CFD to fund capital infrastructure and services. It is not clear though that statues would currently allow the use of CFDs to fund transit operations.

TAX INCREMENT FINANCING

Tax Increment Financing (TIF), in contrast to DIFs, is made up of two components. The first is base revenues, which are the property taxes collected based on existing assessed property values. The second component is the tax increment, which represents the new revenues in excess of the base revenues that are generated based on the higher assessed value of the new development. TIFs can only be imposed by cities and the county, but may be opposed by local agencies as they limit the amount of revenues that are collected in an area positively impacted by the construction of infrastructure, in this case transportation improvements. A mitigating action in the creation of TIFs is that the local agencies could keep the tax increment upon payment of the transportation infrastructure financing.

TIF can only be used to fund capital purchases. Current law allows redevelopment agencies formed by cities and counties to use this type of funding for transit capital projects in highly populated areas. New state legislation would be required to amend the community redevelopment law to authorize funding for transit operations. New state legislation also would be required to amend the community redevelopment law to authorize funding for transit capital in areas with a population under the current thresholds (4 million in the county or 500,000 in a city).

REAL ESTATE TRANSFER TAXES

Real Estate Transfer Taxes (RETT), also referred as deed recordation taxes, are imposed on the sale or transfer of real property. The fees usually are based on or measured by the consideration paid for or the fair market value of the real estate. Thirty-five states already use RETTs to generate revenue. Some of the uses in other jurisdictions in California and Oregon for revenues derived from RETTs include: affordable housing programs, open space, parkland acquisition and maintenance, and transportation infrastructure. In California, RETTs may be imposed only at the local level by cities and counties. The level of revenues generated depends on the rate, though in the San Diego region the high level of real estate valuations also would influence the amount of revenues. California law allows up to a maximum of $0.55 per $500 of the value of the property being conveyed. California law allows up to a maximum of $0.55 per $500 of the value of the property being conveyed. There may be some opposition to the imposition of these RETTs precisely because property owner tax bills may be considered high due to these higher property values.

Currently, the maximum tax is being assessed at $0.55 per $500, which is split evenly with $0.55 per $1,000 for each city and $0.55 per $1,000 for the County. Any additional tax increase for noncharter cities would require new state legislation. Additionally, a charter city can forgo its right to half of
this tax (known as a “conforming tax”) and subsequently can levy a “nonconforming tax” in its place. There does not appear to be a limit on the amount a charter city can charge for a so-called nonconforming tax. Current examples of this practice vary from $1.10 per $1,000 in Riverside and to as high as $15 per $1,000 in Berkeley and Oakland.

**ADVERTISING**

Advertising can provide a source of income with minimal associated overhead costs. Revenues from advertising typically flow directly or indirectly to the operating agencies from single or multiyear advertising contracts. Advertising revenue opportunities can include both electronic and print formats, with print ads opportunities on both buses and at transit stations. Revenue from advertising is typically modest, from 0.1 percent to about 3.0 percent of operating revenue. A targeted advertising strategy focused on station naming rights for new transit services, such as the planned bus rapid transit/rapid bus stations for example, could present the opportunity to help subsidize operations or maintenance costs at these stations. Any new transit advertising strategy would need to be consistent the SANDAG Board Policy No. 034 on advertising.
Table 8.7: Summary of Potential Regional and Local Revenue Sources for Transit Operations

<table>
<thead>
<tr>
<th>Potential Measure</th>
<th>Assumptions</th>
<th>Potential Annual Funds Generated ($M)</th>
<th>Who Has the Authority at the Local Level?</th>
<th>What are the Requirements to Get It Implemented?</th>
<th>Where Can It Be Applied?</th>
<th>Existing Structure in Place or Requires New Structure to Administer</th>
</tr>
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<tbody>
<tr>
<td>Additional Transportation Sales Tax (1)</td>
<td>1/4 to 1/2 Cent Sales Tax</td>
<td>$117 - $234</td>
<td>SANDAG</td>
<td>2/3 Voter-Approval</td>
<td>Regional</td>
<td>Existing Structure</td>
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<td>Vehicle Registration Fees</td>
<td>$2/Vehicle</td>
<td>$5</td>
<td>County (acting as APCD)</td>
<td>Currently implemented; funds distributed via a competitive selection process</td>
<td>Regional</td>
<td>Existing Structure</td>
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<tr>
<td>Transit Center User Fees</td>
<td>$3/Parking Space Fee (Range based on Existing and Planned Spaces at Park and Ride lots)</td>
<td>$1 - $2</td>
<td>SANDAG/ Transit Agencies</td>
<td>SANDAG/ Transit Agency Policy</td>
<td>Regional</td>
<td>Requires New Structure</td>
</tr>
<tr>
<td>Parcel Taxes (2)</td>
<td>$50 to $100 Per Parcel</td>
<td>$35 - $70</td>
<td>Local Jurisdictions</td>
<td>2/3 Voter-Approval</td>
<td>Local/ Regional</td>
<td>Existing Structure</td>
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<td>Payroll Taxes (3)</td>
<td>0.34% to 0.66% of all County Wages and Salaries</td>
<td>$175 - $340</td>
<td>Local Jurisdictions</td>
<td>2/3 Voter-Approval</td>
<td>Local/ Regional</td>
<td>Requires New Structure</td>
</tr>
<tr>
<td>Rental Car Fees (5)</td>
<td>1% to 5% Fee on Gross Rental Car Revenue</td>
<td>$2 - $10</td>
<td>None</td>
<td>New State Legislation</td>
<td>Local/ Regional</td>
<td>Requires New Structure</td>
</tr>
<tr>
<td>Benefit Assessment Districts</td>
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<td></td>
<td>Local Jurisdictions</td>
<td>Nexus Study and Local Agency Approval</td>
<td>Local/ Regional</td>
<td>Requires New Structure</td>
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<tr>
<td>Parking Assessment Districts</td>
<td></td>
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<td>Local Jurisdictions</td>
<td>Nexus Study and Local Agency Approval</td>
<td>Local/ Regional</td>
<td>Requires New Structure</td>
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<td>Development Impact Fees and Exactions (7)</td>
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<td>None</td>
<td>New State Legislation</td>
<td>Local/ Regional</td>
<td>Requires New Structure</td>
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<tr>
<td>Community Facilities Districts (9)</td>
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<td>None</td>
<td>New State Legislation</td>
<td>Local</td>
<td>Requires New Structure</td>
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<td>Tax Increment Finance (10)</td>
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<td>None</td>
<td>New State Legislation</td>
<td>Local</td>
<td>Requires New Structure</td>
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<tr>
<td>Real Estate Transfer Taxes (11)</td>
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<td>Local Jurisdictions</td>
<td>New State Legislation</td>
<td>Local/ Regional</td>
<td>Requires New Structure</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Charter Cities (Other than Charter Cities)</td>
<td>2/3 Voter-Approval</td>
<td>Local</td>
<td>Requirements Structure</td>
</tr>
<tr>
<td></td>
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</table>

(1) Pursuant to Rev. & Tax Code § 72511.1 the cities and the County are capped at 2% aggregate for all local sales taxes. With the current 8.25% state tax rate, there is a maximum available tax rate for the cities and the County of 10.25%. All of the cities and the County have the capacity to add at least another 1/2% before reaching the maximum. The only area of the state that has exceeded this 2% cap is Los Angeles. This was accomplished via SB 314 (2003), which gave LA County the ability to exclude its transportation sales tax from the 2% limit imposed by § 72511.1.

(2) Based on the Alameda-Contra Costa Transit parcel tax rate of $96 per parcel (recent 2008 measure doubled existing $48 parcel tax for transit services).

(3) Wage and salary information from the California Employment Development Department (EED). Tax range based on the New York MTA rate of 0.34% and Portland’s Tri-Met rate of 0.66%. However, Portland does not have a transit sales tax measure.

(4) Existing legislation may allow cities to institute a type of tax known as an "occupation" tax, which is a tax on employees rather than employers.

(5) Rental car fees are currently being charged on gross rental car revenues under the California Tourism Marketing Act. These dollars are spent at the state level by the Office of Tourism. Sample rate taken from the New York MTA recent rental car fee at 5% of gross revenues.

(6) These measures would require more research given the wide range of implementation strategies within each jurisdiction; previous estimates prepared for the 2030 RTP are out-of-date given the significant economic changes that have occurred since then.

(7) Development Impact Fees could only be applied to transit capital expenses and not operating expenses. Local jurisdictions have the authority under the Mitigation Fee Act to impose a fee for transit capital, but new legislation would be required to allow the funding to be used for transit operations.

(8) Any city can establish a Community Facilities District (CFD) under the Mello-Rosie Law. However, it appears that statutes do not currently allow use of CFDs to fund transit operations.

(9) Tax Increment Financing can only be used to fund capital purchases. Current law allows redevelopment agencies formed by cities and counties to use this type of funding for transit capital projects in highly populated areas with the finding of blight. New state legislation would be required to amend the Community Redevelopment Law to authorize funding for transit operations. New state legislation would also be required to amend the Community Redevelopment Law to authorize funding for transit capital in areas with a population under the current thresholds (4 million in the County or 500,000 in a city).

(10) Currently the maximum tax is being assessed ($0.55 per $500, which is split evenly with $0.55 per $1,000 for each city and $0.55 per $1,000 for the County). Any additional tax increase for non-charter cities would require new state legislation.

(11) A charter city can forgo its right to half of this tax (known as a "conforming tax"), and subsequently can levy a "nonconforming tax" in its place. There does not appear to be a limit on the amount a charter city can charge for a so-called nonconforming tax. Current examples of this practice vary and are as high as 15 per $1,000 in Berkeley and Oakland to $1.10 per $1,000 in Riverside.
The Coordinated Plan
Chapter 9
Implementation
Implementation of transportation services based on this plan will largely be the responsibility of the transit operators, health and human social service agencies, the Consolidated Transportation Services Agency (CTSA), and other public agencies (e.g., cities, tribes). The San Diego Association of Governments (SANDAG) will serve as a conduit for federal, state, and local funding of existing and future services recommended in this plan. SANDAG also develops the long-range transit plan through the 2050 Regional Transportation Plan (2050 RTP), develops operating plans for regional services identified in the *TransNet* Extension Ordinance, funds services, and implements projects identified in the *TransNet* Extension Ordinance. SANDAG also plays a role in developing and promoting various alternative transportation modes (e.g., icommutesd.com, buspools, vanpools) and enhancing transportation information (e.g., 511).

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

### 9.1 Program Management Plan and Competitive Process

In its role as the conduit for federal, state, and local funding of existing and future services recommended in the plan, SANDAG prepares and updates the Program Management Plan (PMP) to manage the federal Job Access and Reverse Commute (JARC), and New Freedom grant programs, and the *TransNet* Senior Mini-Grant programs (existing grantees and future sources of funding where available). Future updates to the PMP will include the administration and management processes for the updated Section 5310 Enhanced Mobility for Seniors and Individuals with Disabilities Program. The PMP was originally developed to ensure that all SANDAG policies and federal and local statutes and regulations applicable to these programs are fulfilled. The PMP has been periodically updated to ensure that the maximum possible benefit is enjoyed by the community through a fair and equitable distribution of the available funds. This includes comprehensive community outreach, public involvement, and stakeholder input through coordination with advisory committees (e.g., Social Services Transportation Advisory Council and the Independent Taxpayer Oversight Committee). The complete updated PMP is available at www.sandag.org/pmp. The PMP includes the following two key components:

- Description of the competitive process procedures to select JARC, New Freedom, and Senior Mini-Grant projects
- Overview of the monitoring and reporting requirements of the projects selected and funded through the competitive process
The PMP was updated in FY 2009, FY 2010, and FY 2012 to enhance both of the above components. Amendments to the competitive process included enhancing the connection between the prioritized strategies from the Coordinated Plan and projects funded through the grant programs. Additionally, the PMP includes a general update of the project selection criteria and scoring processes for the JARC, New Freedom, and Senior Mini-Grant programs. The monitoring and reporting requirements were enhanced in FY 2009 to include a requirement for recipients to provide quarterly project reports to enable SANDAG to determine if the grantees are: performing up to expectations; performing on schedule, on budget and within funding limitations; able to meet local match requirements from eligible funds; encountering any non-funding challenges or difficulties; meeting performance goals; and taking corrective action as necessary.

The rural competitive process for JARC and New Freedom applications is run by Caltrans on a statewide basis; however, all rural projects selected by Caltrans in the rural areas of the county must be derived from the Coordinated Plan prepared by SANDAG.

As described in Chapter 1, under the most current federal surface transportation bill, Moving Ahead for Progress in the 21st Century, several grant programs have been consolidated. JARC-related activities have now been rolled into Section 5307 and New Freedom–related projects are now eligible activities under Section 5310. SANDAG is awaiting the Governor’s approval to assume the responsibility of being the designated recipient for Section 5310 funds.

**9.2 FY 2014 Regional Service Implementation Plan**

As the region continues to recover from the economic recession of 2008 to 2012, transit agencies have been cautious in their respective planning efforts. Where appropriate and when funding available, transit agencies will be looking to restore and enhance current routes over the next several years, and in certain cases, new routes will be considered. SANDAG develops the Regional Service Implementation Plan (RSIP) to ensure that any transit service changes are consistent with regional objectives. Each year the Metropolitan Transit System (MTS) and the North County Transit District (NCTD) are required to submit a Service Implementation Plan (SIP) to SANDAG in advance of the budget approval process. The SIPs list the operational changes each transit operator implemented or plans to implement in order to balance proposed fiscal year budgets. Minus budget shortfalls, a discussion is included in these plans regarding the service changes and their impacts on existing service gaps and deficiencies based on the goals and objectives from the Coordinated Plan. This year, both MTS and NCTD provided updated SIPs, which can be found in Appendix F.

Additionally, it is recognized that the CTSA for San Diego also plays a role in regional service implementation since the CTSA’s mission is to provide access and mobility in the region by coordinating existing resources and developing alternative models of transportation. The inclusion of the CTSA in implementation discussions is appropriate given that transit service reductions have created gaps in service coverage that have, in turn, created challenges for the provision of specialized transportation in those areas.
RSIP Development

After receiving the transit agency SIPs, SANDAG is responsible for developing the RSIP to evaluate operational changes. Additional services can include those designed by the operators (MTS or NCTD) and/or by SANDAG. The RSIP includes two sections:

- Service changes (reductions, restructuring, enhancements, or additions)
- Identification of future services and needs to address regional priorities

Service Changes

MTS service planning for FY 2014 was constrained by flat operating revenue. Combined operating revenue was forecasted to increase by 1.7 percent due to anticipated ridership increases. This modest increase in operating revenue was intended to be used to offset rising costs and any service increases were expected to be modest in scope and the costs “self-funded” with offsetting service reductions elsewhere. Service changes implemented in September 2013 were mostly seasonal adjustments and minor system maintenance in nature. The one service expansion change was the implementation of the new Express Route 950 for a one-year trial period; this trial service proved successful and has been added as a permanent service. Supplementary service expansions triggered by increased demand during certain weekday commute periods were implemented in January 2014 on Super Loop Route 201 and Express Route 950, in addition to other minor schedule adjustments.

MTS plans to restructure numerous existing bus services in order to incorporate into the system the new Rapid services funded by TransNet that are scheduled for implementation in 2014 and discussed further under the Regional Service Changes section below.

NCTD implemented new performance measures for BREEZE routes in FY 2014. Route performance will be measured three times a year, concurrent with the three operator bids, and staff will make route adjustments based on performance. In December 2013, NCTD began operations for BREEZE Route 392, a one-year pilot service. NCTD is monitoring loads and utilization of the service and make modifications as necessary in future service changes. In February 2014, BREEZE routes that serve Town Center North Transit Center were re-routed to serve the new San Luis Rey Transit Center in Oceanside. In February 2014, the final phase of the Mobility Plan was implemented. NCTD will maintain the COASTER and SPRINTER level of service set forth in FY 2013. FLEX service will continue as a weekday coverage-based service. NCTD will hold service levels steady in FY 2015. Any changes to BREEZE Routes will come from a reallocation of revenue miles from other routes based on route performance.

While the RSIP ideally focuses on the evaluation of new services and programs for regional consistency and need, the converse also is true. The RSIP must ensure that service reductions and restructuring are consistent with regional goals and objectives. Table 9-1A and 9.1A include the service changes undertaken by MTS and NCTD in FY 2014.
<table>
<thead>
<tr>
<th>Route</th>
<th>Service Proposal Descriptions</th>
<th>Date of Service Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>MTS</td>
<td>Weekday afternoon extra service is added for the school year</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Shortened in downtown due to courthouse construction with the last westbound stop on Broadway at 1st Avenue and the first eastbound stops on Front Street at B Street and Broadway at 3rd Ave</td>
<td>1/2014</td>
</tr>
<tr>
<td></td>
<td>Weekday afternoon extra tripper service is suspended during summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>7</td>
<td>Seasonal reduction in frequency to 20 minutes Monday-Saturday and 30 minutes on Sunday</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Frequency increased to 15 minutes all days for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>8</td>
<td>Seasonal reduction in frequency to 20 minutes Monday-Saturday and 30 minutes on Sunday</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Frequency increased to 15 minutes all days for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>9</td>
<td>Seasonal reduction in frequency to 20 minutes Monday-Saturday and 30 minutes on Sunday</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Frequency increased to 15 minutes all days for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>13</td>
<td>Weekend evening southbound trip times adjusted for better connections at Euclid Trolley</td>
<td>1/2014</td>
</tr>
<tr>
<td>14</td>
<td>Span of service reduced and vehicle type downsized</td>
<td>6/2014</td>
</tr>
<tr>
<td>15</td>
<td>Shortened in downtown due to courthouse construction with the last westbound stop on Broadway at 1st Avenue and the first eastbound stops on Front Street at B Street and Broadway at 3rd Avenue</td>
<td>1/2014</td>
</tr>
<tr>
<td>27</td>
<td>Labor Day (9/2/13) is final day of extra summer service. Starting 9/7/13 Saturday frequency is reduced to 90 minutes and seasonal Sunday service is discontinued</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Saturday frequency increased to hourly and Sunday and holiday service provided during summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>30</td>
<td>Seasonal adjustments to weekend schedule</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Weekend schedule adjusted seasonally</td>
<td>6/2014</td>
</tr>
<tr>
<td>Route</td>
<td>Service Proposal Descriptions</td>
<td>Date of Service Change</td>
</tr>
<tr>
<td>-------</td>
<td>--------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>41</td>
<td>Extra weekday service added for school year</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Weekday morning schedule adjusted for northbound trips that begin on Genesee Avenue at Balboa Avenue</td>
<td>1/2014</td>
</tr>
<tr>
<td></td>
<td>Weekday school trippers suspended during summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>44</td>
<td>Extra weekday service added for school year</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Weekday school trippers suspended during summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>201</td>
<td>Weekday afternoon ten-minute peak frequency extended to 7 p.m. due to increased passenger demand</td>
<td>1/2014</td>
</tr>
<tr>
<td>709</td>
<td>Extra weekday service added for school year</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Weekday school trippers suspended during summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>712</td>
<td>Major schedule changes adopted to accommodate detour at Interstate 805 (I-805). Route 712L trips routed via Orange Avenue and Olympic Parkway</td>
<td>9/2013</td>
</tr>
<tr>
<td>854</td>
<td>Extra Route 854x trips added for school year</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>Route 854x trips provided in peak periods only during summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>894</td>
<td>Major schedule changes made to improve morning westbound service</td>
<td>9/2013</td>
</tr>
<tr>
<td>901</td>
<td>Shortened in downtown due to courthouse construction with the last westbound stop on Broadway at 1st Avenue and the first eastbound stops on Front Street at B Street and Broadway at 3rd Avenue</td>
<td>1/2014</td>
</tr>
<tr>
<td></td>
<td>During peak summer period, July 5 through September 30, frequency increased to 30 minutes and service operated fare-free with supplemental funding provided by City of Coronado</td>
<td>9/2013</td>
</tr>
<tr>
<td>904</td>
<td>Summer only adjustments include fare free operation, frequency increase to 30 minutes and span of service increased</td>
<td>6/2014</td>
</tr>
<tr>
<td>Route</td>
<td>Service Proposal Descriptions</td>
<td>Date of Service Change</td>
</tr>
<tr>
<td>---------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>905</td>
<td>▪ Major adjustments to weekday schedule associated with implementation of Route 950</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>▪ Weekday route and schedule changes: most weekday westbound Route 905 trips re-designated as Route 905B with new service along Sanyo Avenue to Piper Ranch Road. Some morning eastbound Route 905A trips converted to Route 905 for earlier service along Otay Mesa Road. Some morning and afternoon trips converted to Route 950 trips.</td>
<td>1/2014</td>
</tr>
<tr>
<td>921</td>
<td>▪ Weekday trips added for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>932</td>
<td>▪ Schedule adjusted to improve on-time performance</td>
<td>9/2013</td>
</tr>
<tr>
<td>950</td>
<td>▪ Implementation of new trial Express route that operates nonstop via State Route 905 between the Otay Mesa border and the Iris Trolley Station</td>
<td>9/2013</td>
</tr>
<tr>
<td></td>
<td>▪ Significant schedule changes and new weekday afternoon eastbound trips added</td>
<td>1/2014</td>
</tr>
<tr>
<td></td>
<td>▪ Express route adopted into system after successful trial period</td>
<td>6/2014</td>
</tr>
<tr>
<td>Orange Line</td>
<td>▪ Minor trip time change</td>
<td>1/2014</td>
</tr>
<tr>
<td>Green Line</td>
<td>▪ Starting point for some early morning trips moved from 12th &amp; Imperial to Gaslamp Station on all days</td>
<td>1/2014</td>
</tr>
</tbody>
</table>
**Table 9.1B: NCTD Service Changes (FY 2014)**

<table>
<thead>
<tr>
<th>Route</th>
<th>Service Proposal Descriptions</th>
<th>Date of Service Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>NCTD</td>
<td></td>
<td></td>
</tr>
<tr>
<td>101</td>
<td>• Timepoint change from Camino Del Mar/13th to Camino Del Mar/15th to improve schedule reliability</td>
<td>2/2014</td>
</tr>
<tr>
<td>302</td>
<td>• Schedule adjustments to improve on time performance</td>
<td>9/2013</td>
</tr>
<tr>
<td>303</td>
<td>• Due to Mission Avenue project, reroute westbound trips via Horne to Civic Center to Coast Hwy to Seagaze to OTC and eastbound trips via Seagaze to Horne to Mission. Weekday school trippers added for school year.</td>
<td>8/2013</td>
</tr>
<tr>
<td>303</td>
<td>• Route will deviate to serve new San Luis Rey Transit Center, and will continue to serve Town Center North</td>
<td>2/2014</td>
</tr>
<tr>
<td>303</td>
<td>• Weekday school trippers removed for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>304</td>
<td>• Saturday serviced added operating every 60 minutes. Timepoint change from Rancho Santa Fe/El Camino Del Norte to Rancho Santa Fe/Encinitas Blvd to improve schedule reliability.</td>
<td>2/2014</td>
</tr>
<tr>
<td>308</td>
<td>• Addition of one morning and one afternoon school tripper to serve Del Lago Academy in Escondido</td>
<td>8/2013</td>
</tr>
<tr>
<td>308</td>
<td>• Weekday school trippers removed for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>309</td>
<td>• Addition of one morning and one afternoon school tripper to serve Sage Creek High School in Carlsbad</td>
<td>8/2013</td>
</tr>
<tr>
<td>309</td>
<td>• Mission Avenue trips extended to San Luis Rey Transit Center. Buses will stop on-street near Town Center North, but not in the shopping center. Douglas trips will terminate at San Luis Rey Transit Center. Saturday daytime service frequencies improved to every 30 minutes</td>
<td>2/2014</td>
</tr>
<tr>
<td>309</td>
<td>• Weekday school trippers removed for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>Route</td>
<td>Service Proposal Descriptions</td>
<td>Date of Service Change</td>
</tr>
<tr>
<td>---------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>313</td>
<td>Due to Mission Avenue project, reroute westbound trips via Horne to Civic Center to Coast Hwy to Seagaze to OTC and eastbound trips via Seagaze to Horne to Mission</td>
<td>8/2013</td>
</tr>
<tr>
<td>315</td>
<td>Route extended to San Luis Rey Transit Center using State Route 76, Old Grove, Frazee, College, and Vandegrift. Buses will stop on-street near Town Center North, but not enter shopping center. Weekday service will operate every 60 minutes all day.</td>
<td>2/2014</td>
</tr>
<tr>
<td>318</td>
<td>Schedule adjustments to improve on time performance</td>
<td>2/2014</td>
</tr>
<tr>
<td>323</td>
<td>Weekday school trippers added for school year</td>
<td>8/2013</td>
</tr>
<tr>
<td></td>
<td>Schedule adjusted to connect with northbound Route 315 departures at College Boulevard Station</td>
<td>2/2014</td>
</tr>
<tr>
<td></td>
<td>Weekday school trippers removed for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>325</td>
<td>Schedule adjustments to improve on time performance</td>
<td>2/2014</td>
</tr>
<tr>
<td>332</td>
<td>Weekday school trippers added for school year</td>
<td>8/2013</td>
</tr>
<tr>
<td></td>
<td>Weekday school trippers removed for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>341</td>
<td>New six-month pilot service operating between San Marcos Civic Center Station and Department of Rehabilitation</td>
<td>2/2014</td>
</tr>
<tr>
<td>347</td>
<td>Two morning trips adjusted to facilitate connection from SPRINTER at California State University San Marcos</td>
<td>8/2013</td>
</tr>
<tr>
<td></td>
<td>Saturday serviced added operating every 60 minutes</td>
<td>2/2014</td>
</tr>
<tr>
<td>Route</td>
<td>Service Proposal Descriptions</td>
<td>Date of Service Change</td>
</tr>
<tr>
<td>-------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>350</td>
<td>▪ On Saturday and Sunday, 30 minute service frequency extended two hours later in the evening, as proposed in Mobility Plan. Weekday school trippers added for school year</td>
<td>8/2013</td>
</tr>
<tr>
<td></td>
<td>▪ Weekday school trippers removed for summer. Schedule adjustments to make connections with new MTS I-15 BRT service</td>
<td>6/2014</td>
</tr>
<tr>
<td>351</td>
<td>▪ Schedule adjustments to improve on time performance</td>
<td>2/2014</td>
</tr>
<tr>
<td></td>
<td>▪ Schedule adjustments to improve on time performance</td>
<td>6/2014</td>
</tr>
<tr>
<td>352</td>
<td>▪ Schedule adjustments to improve on time performance</td>
<td>2/2014</td>
</tr>
<tr>
<td></td>
<td>▪ Schedule adjustments to improve on time performance</td>
<td>6/2014</td>
</tr>
<tr>
<td>353</td>
<td>▪ On Saturday and Sunday, headway adjusted from every 60 minutes to every 75 minutes to improve schedule reliability.</td>
<td>8/2013</td>
</tr>
<tr>
<td>354</td>
<td>▪ Adjusted weekday schedule times to improve service reliability. Weekday school trippers added for school year.</td>
<td>8/2013</td>
</tr>
<tr>
<td></td>
<td>▪ Weekday school trippers removed for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>355</td>
<td>▪ Saturday and Sunday service added operating every 120 minutes</td>
<td>2/2014</td>
</tr>
<tr>
<td>356</td>
<td>▪ Schedule adjustments to improve on time performance</td>
<td>6/2014</td>
</tr>
<tr>
<td>357</td>
<td>▪ Weekday service added midday trips between existing peak service. Saturday and Sunday service added operating every 120 minutes.</td>
<td>2/2014</td>
</tr>
<tr>
<td>392</td>
<td>▪ New route added to operate as a one-year pilot operation from OTC to the new Naval Hospital Camp Pendleton via Camp Del Mar. Weekday peak service every 30 minutes and every 60 minutes during midday.</td>
<td>12/2013</td>
</tr>
<tr>
<td>395</td>
<td>▪ Minor schedule adjustments</td>
<td>6/2014</td>
</tr>
<tr>
<td>Route</td>
<td>Service Proposal Descriptions</td>
<td>Date of Service Change</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------------------------------------------------------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>445</td>
<td>• Weekday school trippers added for school year</td>
<td>8/2013</td>
</tr>
<tr>
<td></td>
<td>• Weekday school trippers removed for summer</td>
<td>6/2014</td>
</tr>
<tr>
<td>FLEX 374</td>
<td>• FLEX 374 expanded to include city limits of Solana Beach</td>
<td>12/2013</td>
</tr>
<tr>
<td>408</td>
<td>• Implement seasonal service to service Del Mar Fair</td>
<td>6/2014</td>
</tr>
</tbody>
</table>
Regional Service Changes

Beyond necessary service cuts or restructuring activities, the RSIP also includes a list of service enhancements or additions planned for the five-year Coordinated Plan implementation period (FY 2014 to 2018).

SANDAG is currently developing several key transit projects which will be implemented over the next five years. These include several bus rapid transit projects designed to provide trolley-like transit service in corridors where rail investments are not planned. Branded locally as “Rapid” services, the aim is to provide high quality service that combines high service frequencies, creation of stations rather than just bus stops that include enhanced shelters, lighting, and real-time next bus signs, use of various transit signal priority treatments to speed travel times and increase service reliability, and purchase of new, high capacity, low-floor, alternative fuel vehicles. The SANDAG transit projects and services are included in the Program of Projects Expenditure Plan in the TransNet sales tax extension approved by the San Diego County voters in November 2004. The budget worksheets for these projects (as included in the SANDAG FY 2014 Program Budget) are included in Appendix B.

Description of the rail and Rapid projects planned for implementation over the next five years are provided below.

Mid-City Rapid

The Mid-City Rapid Project is a ten-mile line (Route 215) that will operate between San Diego State University (SDSU) to downtown San Diego via El Cajon and Park Boulevards. Route 215 will provide North Park, City Heights, and College area residents, students, and visitors with a high-quality service. Major activity centers that will be served include the downtown Trolley stations, Balboa Park, San Diego Zoo, the Mid-City communities, and SDSU.

The project will provide faster travel times and increased reliability by using a segment of transit-only lanes, curb pop-outs at stations, traffic signal priority and improved synchronization, and enhanced stations. Stations will include upgraded shelters, passenger information signs, new sidewalk platforms, curbs, and gutters to meet City standards and facilitate boarding, and landscaping. The service is scheduled to begin in summer 2014.

I-15 Express Lanes/Rapid Services

The 20-mile I-15 Express Lanes was completed in 2012 from State Route 163 to State Route 78. The I-15 Express Lanes consist of four lanes with a moveable barrier for maximum flexibility (similar to the moveable barriers on the San Diego-Coronado Bridge) throughout most of the corridor, multiple interim access points to/from the general purpose highway lanes, and direct access ramps (DARs) at five locations to provide direct access from the Express Lanes to adjacent Rapid stations for transit riders, car and vanpoolers, and FasTrak users. Rapid stations and DARs are located at the Escondido Transit Center, Del Lago (southern Escondido), Rancho Bernardo,
and Penasquitos/Sabre Springs; and the fifth Rapid station and DAR will open at Mira Mesa in mid-2014.

Rapid service on the I-15 corridor will begin in mid-2014 and involves three distinct services:

- An all-day, all-stop Rapid Service (Route 235) between Escondido Transit Center and Downtown San Diego along the I-15 corridor via the north I-15 communities, Kearny Mesa, and Mid-City.

- An extended peak period Rapid service (Route 237) between Rancho Bernardo and UC San Diego along I-15, Mira Mesa Boulevard and La Jolla Village Drive via north I-15 communities, Sorrento Mesa, and University City.

- A restructuring of the existing peak period commuter express services operating between the north I-15 corridor and downtown San Diego (routes 210, 810, 820, 850, and 860) to tie into the new Rapid Stations, as Route 280 and 290.

The Sabre Springs and Mid-City in-line Rapid stations exemplify the level of investment in the corridor: the Sabre Springs station that opened in spring 2014 features a 600-space parking garage with smart parking technology and designated electric vehicle charging stations, as well as the region’s first modular bike parking facility; two in-line freeway stations schedule to open in mid-2016 will include a bus-only lane in the freeway between Interstate 8 and I-805 and enhanced station designs that will create a safe and pleasant passenger waiting environment, with stairway and elevator access to local bus services at University Avenue and at El Cajon Boulevard (and tie-in with Mid-City Rapid service).

### South Bay Rapid Project

The South Bay Rapid project will provide high-speed transit connections between Downtown San Diego and the Otay Mesa Border Crossing along the future I-805 Managed Lanes and a dedicated transitway through eastern Chula Vista and Otay Ranch. Use of the managed lanes and arterial transitways will provide travel priority for the service allowing it to bypass traffic congestion.

This Rapid will provide access to regional employment centers in Downtown San Diego, the Otay Mesa Business Park, and the future Millenia development, as well as serving residential communities in Chula Vista and National City.
In the long term, the BRT will operate on high-occupancy vehicle (HOV) lanes on State Route 94 and along the I-805 Managed Lanes, with inline stations and park-and-ride lots at 47th Street Trolley station, Plaza Blvd, and H Street.

The project is scheduled for completion in late 2015.

- **Mid-Coast Corridor Light Rail Project**

  The Mid-Coast Corridor Light Rail Project will extend light rail transit (LRT) service from the Old Town Transit Center (OTTC) to the University City community of San Diego. The extension will link major destinations, including Westfield University Towne Center (UTC) shopping mall and UC San Diego with OTTC and Downtown San Diego.

  The locally preferred alternative for the project, adopted by the SANDAG Board of Directors in November 2013, is an 11-mile extension to the existing San Diego Trolley system. It begins just north of the OTTC and travels in existing railroad right-of-way and alongside Interstate 5 (I-5) to serve UC San Diego and UTC. Between OTTC and State Route 52 (SR 52), stations are proposed at Tecolote Road, Clairemont Drive, and Balboa Avenue. Within the University City area, stations are proposed at Nobel Drive, the Veterans Administration Medical Center, UC San Diego west campus, UC San Diego east campus, Executive Drive, and the UTC transit center. Service is expected to be implemented in late 2018.

- **Identification of Future Services and Needs**

  The RSIP also includes a discussion of the plan to develop new services in the future should additional funding become available. At such a time, proposals for new services will be prioritized and recommended for funding consideration based on the performance measures included in Chapter 3. The need for those services is generally identified by the individual transit operators in their service implementation plans, as well as by SANDAG through the Coordinated Plan development process and identification of gaps in transit service (Chapter 6). Table 9.2 summarizes the needs identified by NCTD and MTS. Table 9.3 highlights some of the major transit service needs in the RTP urbanized area (based on Figure 3.1 from Chapter 3) based on the understanding that transit performs better in areas where land use is supportive of transit services. Additionally, it is envisioned that urban service needs can maximize the use of limited investment dollars during lean financial times to produce the largest number of transit trips.
<table>
<thead>
<tr>
<th>Route</th>
<th>Day</th>
<th>Description</th>
<th>Urban Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>JUNE 2014</td>
<td>New BRT service, Escondido TC-downtown San Diego; peak 15 minute frequency;</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>235</td>
<td>off-peak 30 minute frequency</td>
<td></td>
</tr>
<tr>
<td></td>
<td>235</td>
<td>New BRT service, Escondido TC-downtown San Diego: 30 minute frequency</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>235</td>
<td>New BRT service, Escondido TC-downtown San Diego: 30 minute frequency</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>SEPTEMBER 2014</td>
<td>New BRT service, Rancho Bernardo-Miramar College TS-UC San Diego: 15-20</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>237</td>
<td>minute frequency</td>
<td></td>
</tr>
<tr>
<td></td>
<td>JANUARY 2015 (or later)</td>
<td>Implement service, Old Town-Gilman TC-VA Medical Center-UTC TC: 30 minute</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>150</td>
<td>frequency</td>
<td></td>
</tr>
<tr>
<td></td>
<td>150</td>
<td>Implement service, Old Town-Gilman TC-VA Medical Center-UTC TC: 30 minute</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>150</td>
<td>frequency</td>
<td></td>
</tr>
<tr>
<td></td>
<td>NCTD Identified Service Area Needs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>FY 2017</td>
<td>New Route</td>
<td>Weekday New BREEZE route connecting Carlsbad Poinsettia COASTER Station and</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>San Marcos Civic Center via Alga Road and San Elijo Hills</td>
<td></td>
</tr>
<tr>
<td>FY 2018</td>
<td>New Route</td>
<td>Weekday New peak period SVCC shuttle connecting Sorrento Valley COASTER</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Station to Del Mar Heights via El Camino Real</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Route 101 Limited Stop</td>
<td>Weekday Implement weekday peak period limited stop service on BREEZE Route 101</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Route 303 Limited Stop</td>
<td>Weekday Implement weekday peak period limited stop service on BREEZE Route 303</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Table 9.3: Identified Regional Needs

<table>
<thead>
<tr>
<th>Service Area</th>
<th>Service Need</th>
<th>Urban Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Del Mar, Carmel Valley, and Sorrento Mesa</td>
<td>Increased service between MTS and NCTD service boundaries, including service to Carmel Valley</td>
<td>No</td>
</tr>
<tr>
<td>North County to University Town Center</td>
<td>Service connectivity from COASTER to UTC and UCSD</td>
<td>Yes</td>
</tr>
<tr>
<td>Riverside County</td>
<td>Provide service from Riverside County to key regional job centers in Downtown San Diego, Sorrento Mesa/University City, Mission Valley, and Kearny Mesa</td>
<td>No</td>
</tr>
<tr>
<td>San Ysidro/Otay</td>
<td>Improve service along I-5 and I-805 corridors to the border.</td>
<td>Yes</td>
</tr>
<tr>
<td>Downtown</td>
<td>Implement Downtown circulator for internal trip-making</td>
<td>Yes</td>
</tr>
<tr>
<td>San Ysidro/Otay to Mission Valley</td>
<td>Improve service from the border to Mission Valley via I-805</td>
<td>Yes</td>
</tr>
<tr>
<td>South County to Sorrento Mesa</td>
<td>Provide service between inland South County and Sorrento Mesa</td>
<td>Yes</td>
</tr>
<tr>
<td>Sorrento Mesa)</td>
<td>Service between East County and job centers in Sorrento Mesa via Kearny Mesa and UTC</td>
<td>Yes</td>
</tr>
<tr>
<td>Carmel Valley, Rancho Penasquitos, Mira Mesa, and Santee</td>
<td>Improve service from San Diego and Santee communities to University City employment zones</td>
<td>Yes</td>
</tr>
</tbody>
</table>
CTSA Service Implementation

In 2006 SANDAG designated Facilitating Access to Coordinated Transportation (FACT), a nonprofit organization, to be the CTSA for San Diego County through a competitive bid process. CTSAs were established by the state legislature in 1979 to foster coordinated transportation services. The CTSA designation confers a quasi-governmental entity status on FACT. The primary purpose of FACT is to coordinate the development of a specialized transportation system that will improve access and mobility for the County, especially for trip needs not met by fixed-route transit. FACT’s mission is to “assist San Diego County residents with barriers to mobility to achieve independence through coordination of transportation services.” In December 2009, FACT developed a Business Plan to provide a comprehensive review of FACT’s mission of meeting unmet needs for specialized transportation. The Business Plan envisioned FACT as a one stop transportation call center, technical advisor for regional coordination and potentially a brokerage for transportation services that would identify and meet gaps in existing transportations services.

The Business Plan is updated annually. The most recent update was adopted in April 2013 (2014 to 2019 Business Plan Update). The plan prioritized FACT’s proposed services into “Current,” “Short Term,” or “Long Term” services, some of which are listed below:

Current:
- Develop Safety Program
- Ensure compliance with federal, state, and local Regulations
- Coordinate with SANDAG and 2-1-1 on Veteran’s Mobility
- Develop service projections
- Develop in-house transportation brokerage
- Implement RideFACT Pilot and Countywide Implementation
- Donate Paratransit Vehicles to Community

Proposed Short-Term Services (1 to 2 years):
- Integrate MedRIDE and MedAccessRIDE into RideFACT
- Enhance Customer Assistance and Outreach
- Lease FACT owned vehicles to service providers
- Conduct Technical Assistance workshops
- Conduct Trip Management Software Procurement
- Coordinate with SANDAG and 2-1-1 on Veterans mobility initiatives
Proposed Long-Term Services (3-5 years):

- Coordinate Medical Transportation
- Develop MEDICAID Transportation Brokerage

In January 2012, FACT implemented a pilot brokered transportation system called RideFACT, providing trips to seniors in Escondido, Rancho Bernardo, and Poway. In June 2012, RideFACT began providing trips to all cities in San Diego County, including Ramona, the Country Estates, and Spring Valley. Eligible clients may call for referrals to any transportation in the county and if a suitable option were not available, they would be offered a trip by FACT.

In April 2012 FACT collaborated with SANDAG and 2-1-1 San Diego on an application for Federal Transit Administration funds to provide mobility services to military personnel, veterans, and their families. The Veterans Mobility project will improve access to transportation information for San Diego County through an enhanced directory of transportation resources, a one-click transportation website, 24/7 live telephone service, a free mobile transportation application for smart phones, at least 20 interactive information kiosks, and enhanced local planning via trend identification and gap analysis. Upon grant execution, FACT will amend the business plan to include projects funded by the new grant.

9.3 Looking Ahead

SANDAG and the transit agencies have continued to evaluate the need for enhanced services based on the knowledge of changing development, demographics, fuel prices, or gaps in service from current service cuts. Additionally, the CTSA also is developing ways to serve other passengers in the region in areas outside of the transit coverage area.

MTS developed a Comprehensive Operations Analysis (COA) in 2005, with the full implementation period occurring through FY 2007. MTS will continue to monitor operations consistent with MTS Policy No. 42, which was amended in 2007 to incorporate the vision for MTS services developed in the COA; services that are productive, customer-focused, competitive with other travel options, integrated, and sustainable. Additionally, MTS conducted a weekend service analysis in 2009 and utilized the results to adjust weekend services in 2010. Most recently, in fall 2012, with the Trolley Renewal halfway complete, MTS realigned lines to allow direct trips to downtown on all lines. Additionally, MTS has identified route improvements to be phased in over the next year as shown previously in Table 9.2A.
**NCTD** has fully implemented its Mobility Plan that restructures existing services to develop a financially sustainable route network in North County. Much of the focus of the Mobility Plan is on reshaping the fixed route bus network around the foundation of the two rail lines, the COASTER and the SPRINTER. The service changes included in the plan reflect prevailing and projected future conditions with respect to the land use and development in the NCTD service area. Additionally, NCTD is looking toward the development of COASTER platforms at Camp Pendleton and at the Convention Center in Downtown San Diego as well as improving SPRINTER headways from 30 minutes to 20 minutes. These service development needs are included in Table 9.2A.

**SANDAG** most recently completed a significant update to its RTP that now extends the long-range planning period out 36 years to the year 2050. Projects that are included in the near term phasing (five year time period) of the 2050 RTP transit component, of that SANDAG has the ability to significantly fund the planning, construction, and operations of regional transit services through the extension of the TransNet half-cent sales tax measure. This measure will fund the SuperLoop, Mid-City Rapid, I-15 Managed Lanes Rapid, and South Bay Rapid projects discussed in the “Service Enhancements or Additions” section.

### 9.4 Post Implementation Monitoring

The Coordinated Plan includes the evaluation of transportation system performance using the performance measures and indicators developed in the original plan. In the future, the document will add more quantitative analysis on a regional basis as more data becomes available on public transit and supplementary transportation providers. New technologies are also being implemented in transit, including automatic vehicle location devices, the Compass Card, and automatic passenger counting devices. These new technologies will increase the amount of data available when future plans are being produced. The timeliness of the data and the accuracy should also be improved. Future plans will address the data priorities and recommend where efforts should be made to improve the flow of information.

Currently, very little data is available on transportation coordination or the specialized transportation system. As SANDAG becomes more involved in funding these services, it is expected that more information will become available on the performance of these systems. The performance data will be fed back into the planning process, and priorities may be adjusted.

### 9.5 Unforeseen Events

This plan has been prepared based on the best information available and the current guidance and priorities from senior levels of government. Unforeseen events, such as escalations in fuel prices, changes to funding formulae, or annual appropriations could impact local transportation operations. In addition, the success of the future projects or plans, such as the I-15 and South Bay Rapid, and Mid-City Rapid projects in this plan period have the potential to significantly change the baseline levels of transit ridership and performance in San Diego. The combined impact of these changes may cause significant changes to this plan over next five years as these projects are implemented.