TRANSPORTATION COMMITTEE AGENDA

Friday, June 18, 2010
9 a.m. to 12 noon
SANDAG Board Room
401 B Street, 7th Floor
San Diego

AGENDA HIGHLIGHTS

• JOB ACCESS AND REVERSE COMMUTE AND NEW FREEDOM PROGRAM EVALUATION CRITERIA

• 2050 REGIONAL TRANSPORTATION PLAN: DRAFT PLAN PERFORMANCE MEASURES

• INTERSTATE 5 NORTH COAST CORRIDOR PROJECT UPDATE

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MISSION STATEMENT

The 18 cities and county government are SANDAG serving as the forum for regional decision-making. SANDAG builds consensus, makes strategic plans, obtains and allocates resources, plans, engineers, and builds public transit, and provides information on a broad range of topics pertinent to the region's quality of life.

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Welcome to SANDAG. Members of the public may speak to the Transportation Committee on any item at the time the Committee is considering the item. Please complete a Speaker’s Slip, which is located in the rear of the room, and then present the slip to Committee staff. Also, members of the public are invited to address the Committee on any issue under the agenda item entitled Public Comments/Communications/Member Comments. Speakers are limited to three minutes. The Transportation Committee may take action on any item appearing on the agenda.

This agenda and related staff reports can be accessed at www.sandag.org under meetings on SANDAG’s Web site. Public comments regarding the agenda can be forwarded to SANDAG via the e-mail comment form also available on the Web site. E-mail comments should be received no later than noon, two working days prior to the Transportation Committee meeting. Any handouts, presentations, or other materials from the public intended for distribution at the Transportation Committee meeting should be received by the Clerk of the Board no later than 12 noon, two working days prior to the meeting.

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ITEM # | RECOMMENDATION
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+1. APPROVAL OF JUNE 4, 2010, MEETING MINUTES | APPROVE

2. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

Members of the public will have the opportunity to address the Transportation Committee on any issue within the jurisdiction of the Committee that is not on this agenda. Speakers are limited to three minutes each and shall reserve time by completing a “Request to Speak” form and giving it to the Clerk prior to speaking. Committee members also may provide information and announcements under this agenda item.

REPORTS (3 through 8)

+3. JOB ACCESS AND REVERSE COMMUTE AND NEW FREEDOM PROGRAM EVALUATION CRITERIA (Dan Levy) | APPROVE

In 2008, the Transportation Committee approved revisions to the evaluation and scoring criteria for the Job Access and Reverse Commute and New Freedom federal grant programs. The Transportation Committee is asked to approve the New Freedom and Job Access and Reverse Commute evaluation and scoring criteria, as outlined in Attachments 1 and 2 respectively, for the 2010-2011 competitive grant process (federal fiscal year 2010 funding) anticipated to begin in June 2010.

+4. DRAFT FY 2011 TRANSIT AGENCY OPERATING BUDGETS (Tim Watson, SANDAG; Richard Hannasch, North County Transit District; and Paul Jablonski, Metropolitan Transit System) | APPROVE

Metropolitan Transit System and North County Transit District will present a summary of their FY 2011 budgets, including the use of contingency reserves and a five-year forecast of operations. The Transportation Committee is asked to approve the North County Transit District and Metropolitan Transit System FY 2011 operating budgets for funding, with final budgets subject to approval by the respective transit district boards.

+5. 2050 REGIONAL TRANSPORTATION PLAN: DRAFT PLAN PERFORMANCE MEASURES (Scott Strelecki) | RECOMMEND

Proposed plan performance measures have been developed for use in the preparation of the 2050 Regional Transportation Plan. The Transportation Committee is asked to recommend that the Board of Directors approve the 2050 Regional Transportation Plan performance measures in substantially the same form as attached to the report.
6. PROPOSED FY 2011 BUDGET AMENDMENT: LOSSAN BRIDGE REPLACEMENTS (Jim Linthicum)

The U.S. Navy would like to reconstruct two bridges along the Los Angeles-San Diego-San Luis Obispo (LOSSAN) corridor in Camp Pendleton to allow larger vehicles to pass underneath the bridges. This item authorizes the Executive Director to enter into agreements with the Navy to fully fund this work and to amend the FY 2011 budget accordingly. The Transportation Committee is asked to recommend that the Board of Directors authorize the Executive Director to enter into agreements with the Naval Facilities Engineering Command to fully fund the project development and reconstruction of LOSSAN bridges 208.6 at Green Beach and 218 at Red Beach and amend the FY 2011 budget accordingly.

7. BLUE AND ORANGE TROLLEY LINE CORRIDOR UPDATE (John Haggerty) INFORMATION

This item provides a progress update on the capital program for procuring new low-floor light rail vehicles, upgrading stations, and rehabilitating rail infrastructure on the San Diego Trolley system. The program update includes freight capacity projects on the rail line between San Diego and San Ysidro including environmental status.

8. INTERSTATE 5 NORTH COAST CORRIDOR PROJECT UPDATE (Allan Kosup, Caltrans) INFORMATION

Staff will present an update on the Interstate 5 North Coast Corridor, including the project development efforts underway and the upcoming release of the Draft Environmental Document.

9. UPCOMING MEETINGS INFORMATION

The next meeting of the Transportation Committee is scheduled for Friday, July 2, 2010, at 9 a.m.

10. ADJOURNMENT

+ next to an agenda item indicates an attachment
TRANSPORTATION COMMITTEE DISCUSSION AND ACTIONS
MEETING OF JUNE 4, 2010

The meeting of the Transportation Committee was called to order by Chair Jack Dale (East County) at 9:05 a.m. See the attached attendance sheet for Transportation Committee member attendance.

1. APPROVAL OF MEETING MINUTES

Action: Upon a motion by Supervisor Ron Roberts (County of San Diego) and a second by Mayor Pro Tem Carrie Downey (South County), the Transportation Committee approved the minutes from the May 21, 2010, meeting.

2. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

Clive Richard, a member of the public, spoke regarding efforts toward coordinated transit in the region.

CONSENT (3)

3. LOS ANGELES-SAN DIEGO-SAN LUIS OBISPO (LOSSAN) RAIL CORRIDOR AGENCY BOARD OF DIRECTORS MEETING REPORT (INFORMATION)

The LOSSAN Rail Corridor Agency seeks to increase ridership, revenue, capacity, reliability, and safety on the coastal rail line from San Diego to Los Angeles to San Luis Obispo. Known as Amtrak’s Pacific Surfliner corridor, it is the second busiest intercity passenger rail corridor nationwide and Amtrak’s fastest growing. The report summarizes the actions from the LOSSAN Board meetings held in February through April 2010.

Action: This item was presented for information.

CHAIR’S REPORT (4)

4. SOCIAL SERVICES TRANSPORTATION ADVISORY COUNCIL (SSTAC) MEMBER OPENINGS (INFORMATION)

Dan Levy, Senior Regional Planner, announced that the SSTAC currently has four openings for citizen members and one opening for a Social Service Provider for Persons with Disabilities. The positions will be appointed by the Transportation Committee in July of this year. Citizen membership on SSTAC is open to senior and adult disabled transit users who are well versed in the Americans with Disabilities Act and Title 24 regulations. Interested citizens are encouraged to check the SSTAC page on the SANDAG Website for more information or contact staff member Dan Levy (dle@sandag.org).
**Action**: This item was presented for information.

### REPORTS (5 through 6)

5. **FY 2010 TRANSPORTATION DEVELOPMENT ACT CLAIM AMENDMENTS (APPROVE)**

At its January 22, 2010, meeting, the Board of Directors approved a reduction of the Fiscal Year (FY) 2010 Transportation Development Act (TDA) apportionment. As a result, certain claims by Metropolitan Transit System (MTS), North County Transit District (NCTD), SANDAG, and the Consolidated Transportation Planning Agency (CTSA), which were based on the original FY 2010 approved apportionment, must now be revised to reflect that reduction.

Sookyung Kim, Financial Programming Manager, presented the item.

**Action**: Upon a motion by Mayor Pro Tem Downey and a second by Mayor Jim Desmond (North County Inland), the Transportation Committee (1) approved Resolution Nos. 2010-13 to 2010-15 related to FY 2010 TDA claim amendments in substantially the same form as shown in Attachment 1; and (2) directed staff to provide instructions to the County Office of Auditor Controller to revise these claims.

6. **FY 2011 TRANSPORTATION DEVELOPMENT ACT ALLOCATIONS (RECOMMEND)**

As the designated Regional Transportation Planning Agency for the San Diego region, SANDAG is responsible for the annual allocation of TDA funds to the region's cities, the County, and transit operators.

Ms. Kim presented the item.

**Action**: Upon a motion by Mayor Desmond and a second by Chairman Bob Campbell (NCTD), the Transportation Committee recommended that the Board of Directors approve Resolution Nos. 2010-16 to 2010-19 in substantially the same form as attached hereto, approving FY 2011 TDA allocations.

Paul Jablonski, Executive Director, MTS, provided a report on the status of the repairs to the trolley in El Cajon due to the small plane that crashed into the catenary lines and disrupted service.

Chair Dale adjourned the Transportation Committee meeting at 9:17 a.m.

### TRANSPORTATION COMMITTEE AND REGIONAL PLANNING COMMITTEE ACTIONS JOINT MEETING OF JUNE 4, 2010

The joint meeting of the Transportation Committee and the Regional Planning Committee was called to order by Chair Jim Janney (South County) and Chair Jack Dale (East County) at 9:47 a.m.

**A. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS**

Bill Figge, Caltrans District 11, reported that Cindy McKim has been appointed as the director for Caltrans.
B. RECENT AWARDS (INFORMATION)

Chair Janney announced that SANDAG has received two planning awards recently. The first is from the San Diego/Tijuana Chapter of the Urban Land Institute (ULI) awarding SANDAG’s Regional Comprehensive Plan (RCP) and Smart Growth Concept Map with a “Smart Growth of the Decade Award.” The second is from the San Diego Chapter of the American Planning Association (APA) for SANDAG’s Smart Growth Design Guidelines.

Action: This item was presented for information.

C. URBAN AREA TRANSIT STRATEGY: MODE SHARE GOALS; PERFORMANCE OF ALTERNATIVE NETWORKS; INITIAL RECOMMENDATIONS FOR A REVISED TRANSIT NETWORK; AND DISCUSSION OF COMPLEMENTARY HIGHWAY NETWORK CONCEPTS FOR THE 2050 REGIONAL TRANSPORTATION PLAN (DISCUSSION)

During April and May, staff presented the Urban Area Transit Strategy alternative transit networks to the Transportation Committee, various SANDAG working groups, and at the 2050 Regional Transportation Plan (RTP) public workshops for public input. The networks also were reviewed by an outside Peer Review Panel. The attached staff report summarized the comments received to-date on the three alternative networks, presented draft transit mode share goals for key corridors/communities, discussed initial performance data for the alternative networks, and proposed initial recommendations for a revised transit network and complementary highway network concepts. Initial thoughts on a draft 2050 RTP Unconstrained Transportation Network will be made to the Board of Directors at its June 11, 2010, Policy Meeting.

Carolina Gregor, Senior Regional Planner, introduced the item.

Dave Schumacher, Principal Regional Planner, presented an in depth detailed presentation on the three alternative transit networks.

Heather Werdick, Senior Regional Planner, presented information on the complementary highway network concepts.

Duncan McFetridge, Save Our Forests and Ranchlands (SOFAR), submitted written documents and spoke regarding SOFAR’s concerns and suggestions about the Urban Area Transit Strategy and alternative networks.

Ben Nicholls, Executive Director Hillcrest Business Association, spoke in favor of this item.

Action: This item was presented for discussion.

D. SMART GROWTH TRIP GENERATION STUDY (RECOMMEND)

A draft of the smart growth trip generation study and parking literature review was presented to the Regional Planning and Transportation Committees in March for recommendation to the Board of Directors for acceptance. The Transportation Committee recommended that the Board of Directors accept the study, and the Regional Planning Committee requested clarification regarding the use of the study.

Christine Eary, Associate Regional Planner, presented further details as requested.
Action: Upon a motion by Supervisor Ron Roberts (County of San Diego) and a second by Councilmember Lesa Heebner (North County Coastal), the Transportation and Regional Planning Committees recommended that the Board of Directors accept the study for inclusion in the San Diego Traffic Generators Manual as an appendix and as a resource for local jurisdictions. The motion passed with Councilmember Sherri Lightner (City of San Diego) opposing.

E. COMMUNITIES PUTTING PREVENTION TO WORK GRANT (INFORMATION)

The County of San Diego has received a federal economic stimulus grant from the Centers for Disease Control and Prevention to support policy development and programs leading to built environment changes that support active lifestyles and healthy nutrition. SANDAG is among the partners helping to implement this grant with a focus on active transportation, safe routes to schools, and regional policy development.

Chairwoman Pam Slater-Price (County of San Diego) introduced the item.

Supervisor Roberts discussed his role in implementing the grant.

Stephan Vance, Senior Regional Planner, presented the item.

Tracy Delaney, County of San Diego, spoke regarding the County’s appreciation for the grant.

Action: This item was presented for information.

7. UPCOMING MEETINGS

The next meeting of the Transportation Committee is scheduled for Friday, June 18, 2010, at 9 a.m.

8. ADJOURNMENT

Chair Dale adjourned the meeting at 11:40 a.m.

Attachment: Attendance Sheet
## CONFIRMED ATTENDANCE
### SANDAG TRANSPORTATION COMMITTEE MEETING
### JUNE 4, 2010

<table>
<thead>
<tr>
<th>GEOGRAPHICAL AREA/ORGANIZATION</th>
<th>JURISDICTION</th>
<th>NAME</th>
<th>MEMBER/ALTERNATE</th>
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<tr>
<td>North County Coastal</td>
<td>City of Carlsbad</td>
<td>Matt Hall (Vice Chair)</td>
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<td>Todd Gloria</td>
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<td>Marti Emerald</td>
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<td>ADVISORY/LIAISON Caltrans</td>
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<td>Laurie Berman</td>
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<td>SCTCA</td>
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<td>Albert Phoenix</td>
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<td>Dave Toler</td>
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<td>Francine Kupsch</td>
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<td>Jerome Stocks</td>
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San Diego Association of Governments
TRANSPORTATION COMMITTEE

June 18, 2010

AGENDA ITEM NO.: 3

Action Requested: APPROVE

JOB ACCESS AND REVERSE COMMUTE AND
NEW FREEDOM PROGRAM EVALUATION CRITERIA

File Number 3320200

Introduction

SANDAG was selected by the Governor of California as the designated agency to award and facilitate the Job Access and Reverse Commute (JARC) and New Freedom federal grant programs for the San Diego urbanized area. The responsibilities with this designation include development of the evaluation criteria, holding a competitive grant process, and recommending to the Federal Transit Administration (FTA) which projects should be funded. Funds from the New Freedom program are available for operating, capital, and mobility management projects providing new or expanded transportation services and facilities for persons with disabilities. Funds from the JARC program are available for operating, capital, and mobility management projects that support the development and maintenance of transportation services designed to transport low-income individuals to and from jobs and other employment-related activities.

Discussion

The FTA issues guidance on strategies for addressing the requirements set forth by SAFETEA-LU (Safe, Accountable, Flexible, Efficient Transportation Equity Act: A Legacy for Users) in regards to JARC and New Freedom. Under SAFETEA-LU, a region’s coordinated plan must prioritize projects for funding. The 2009-2013 Coordinated Public Transit - Human Services Transportation Plan (Coordinated Plan) prioritized the needs in the San Diego region from which all projects must be derived to be eligible for funding. Updated priorities for grant funding will be addressed in the 2010-2014 Coordinated Plan and will be reviewed by the Social Services Transportation Advisory Council (SSTAC), a group which includes representatives from transit agencies, the region’s Consolidated Transportation Service Agency (CTSA), social service providers, and at-large citizen members. Thus, the JARC and New Freedom evaluation criteria for the anticipated 2010 competitive grant process will be primarily focused on ranking the technical merits of project proposals as the prioritization of needs occurs in the Coordinated Plan.

Evaluation and Scoring Criteria

The evaluation and scoring criteria for the JARC and New Freedom awards were originally developed in 2007 and revised in 2008 in response to a review of the process. The evaluation and scoring criteria are consistent with the federal guidance for both programs. Staff experience with the current evaluation and scoring criteria has been positive, and it is recommended that the same criteria be used in the next JARC and New Freedom competitive process. The proposed evaluation
criteria are provided in Attachments 1 and 2. The format and principles used to design the JARC and New Freedom evaluation and scoring criteria also were adapted to the Senior Mini-Grant Program and approved by the Transportation Committee in April 2010.

JARC and New Freedom Funding

Funding for the JARC and New Freedom programs is currently only authorized through federal fiscal year (FFY) 2010 (through September 30, 2010), meaning that grant applicants would only apply for a one-year grant at this time. Future competitive grant processes will be held every other year subject to the current programs being continued in the next federal transportation reauthorization.

JARC and New Freedom Federal Reporting to the FTA

The FTA requires an annual report for each JARC and New Freedom funded service in operation during the last FFY. This year, the report included projects from SANDAG subrecipients, as well as direct recipients (Metropolitan Transit System and North County Transit District) in operation during FFY 2009 (October 1, 2008 – September 30, 2009). The report on each project provides a good overview of the service description, performance evaluation, grant accomplishments, and lessons learned. The complete reports for each of the JARC and New Freedom projects funded in San Diego County are provided in Attachment 3.

Next Steps

The proposed schedule for the competitive selection and grant award process for the JARC, New Freedom, and TransNet Senior Mini-Grant programs is shown below. The competitive selection process intends to align with the statewide rural JARC and New Freedom competition administered by Caltrans, as well as the release of the final draft of the Coordinated Plan update.

<table>
<thead>
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<th>Activity</th>
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<tr>
<td>Approval of TransNet Senior Mini-Grant process and criteria by the Transportation Committee</td>
<td>April 2, 2010 (Approved)</td>
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<td>Transportation Committee considers Job Access and Reverse Commute and New Freedom evaluation scoring criteria</td>
<td>June 18, 2010</td>
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<td>Grant application workshops</td>
<td>July – August 2010</td>
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<td>Selection of evaluation committee</td>
<td>September 20, 2010</td>
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<td>Final proposal applications due</td>
<td>Late October 2010</td>
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<tr>
<td>Project award summary to advisory committees and working groups</td>
<td>January 2011</td>
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<td>Transportation Committee considers funding recommendations</td>
<td>February 2011</td>
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CHARLES “MUGGS” STOLL
Director of Land Use and Transportation Planning

Attachments: 1. FFY 2010 JARC Project Evaluation and Scoring Criteria
2. FFY 2010 New Freedom Project Evaluation and Scoring Criteria
3. FFY 2009 FTA JARC and New Freedom Service Profiles

Key Staff Contact: Dan Levy, (619) 699-6942, dle@sandag.org
Job Access and Reverse Commute  
Project Evaluation and Scoring Criteria

The following information and scoring criteria were used to score and rate project applications for Job Access and Reverse Commute (JARC) funding.

**Minimum Eligibility Criteria:** Must answer **Yes** to each question to be eligible.

1. Is the agency a local governmental agency, (private or public) operator of public transportation, nonprofit agency, or a tribal government?

2. Is the project derived from a Very High or High Priority in the 2010 – 2014 Coordinated Plan?

: **Very High**
   → Develop or expand transit and nonagency client transportation services in areas with little or no other transportation options based on identified gaps in transportation services included in Chapters 6 and 7; or
   → Develop or expand transportation solutions in areas with sufficient densities to support shared ride or coordinated services based on identified gaps in transportation services included in Chapters 6 and 7.

: **High**
   → Develop a centralized ride scheduling, dispatching, a mobility center
   → Improve transportation services to the rural areas
   → Increase coordination efforts by combining resources such as vehicles, riders, funds for rides, vehicle maintenance, drivers, driver training, insurance coverage, general ride subsidies, dispatching equipment, software, and gas cards for volunteers
   → Increase work-based weekday and weekend service based on identified gaps in service included in Chapters 6 and 7
   → Increase work-based weeknight service based on identified gaps in service included in Chapters 6 and 7
   → Provide travel training to encourage more individuals to ride regular transit
   → Develop or enhance volunteer driver programs
   → Upgrade bus stops to include weather protection

**Goals and Objectives (maximum 15 points).** The information and scoring criteria below will be used to score and rate project applications for JARC funding.

→ Will the project serve the appropriate population? Does the proposal provide pertinent demographic data and/or maps? **(5 points)**

→ Will the proposed program increase or enhance the availability of transportation for low-income individuals for job-related trips? **(5 points)**

→ To what extent is the proposed project consistent with the goals and objectives of the JARC program? **(5 points)**
a. Operational/Implementation Plan (maximum 15 points)

→ How thorough is the implementation plan? Does the proposal include project tasks, timelines, benchmarks, key milestones, key personnel, deliverables, and routes and schedules as applicable? Does the implementation plan and timeline seem feasible? (5 points)

→ Does the applicant demonstrate the technical ability to manage the project? Has the applicant effectively implemented projects using federal or state funds in the recent past; has the applicant managed similar projects; has the applicant had sufficient experience in providing services for the targeted clientele? Does the agency have adequate staff to resources to handle the project? If applicable, are drivers properly trained? If applicable, does the agency display the ability to maintain vehicles? (5 points)

→ Does this project relate to other services or facilities provided by the agency or firm? Does the operational plan correspond with the project goals/objectives? (5 points)

b. Program Effectiveness and Performance Indicators (maximum 20 points)

→ Does the project make use of JARC funds in an efficient and cost effective manner? (5 points)

→ Does the proposal describe efforts to ensure the project’s cost-effectiveness (and other measurable units of service)? Will the project experience increasing efficiencies over time? If applying for a capital project, does the applicant demonstrate that the purchase is the most cost-effective product for the service being provided? (5 points)

→ Does the proposal provide measurable performance indicators to measure and evaluate the effectiveness of the proposed project in meeting the identified goals? For capital-related projects, does the applicant establish milestones and methods for reporting the status of project delivery? (5 points)

→ Does the applicant describe methodologies and procedures for ongoing monitoring and evaluation of the project or service, and steps to be taken if original goals are not achieved? (5 points)

c. Coordination and Program Outreach (maximum 15 points)

→ Does the proposal describe how key stakeholders will remain involved and informed throughout the process? Did the applicant attach three letters of support from stakeholders to the grant application? (5 points)

→ How thorough are the applicant’s proposed strategies for marketing the project and promoting public awareness? (5 points)

→ To what extent does the project demonstrate coordination among various entities? (5 point maximum - 1 point per type of coordination)
  : Shared use of vehicles
  : Dispatching or scheduling
  : Maintenance
  : Back-up transportation
  : Staff training programs
  : Joint procurement of services and supplies
  : Active participation in local social service transportation planning process
  : Coordination of client trips with other transportation agencies
d. **Project Budget (maximum 15 points)**

- Was a clearly defined budget submitted for the proposed project? **(5 points)**
- Does the project appear to be feasible as described? **(5 points)**
- Is the source of local share stable? **(5 points)**

e. **Sustainability (maximum 10 points)**

- Does the applicant demonstrate a long-term commitment to the project to continue the effort beyond the availability of the requested grant resources? Is this applicant financially capable of sustaining operations after the initial grant funding is expended? **(5 points)**
- Does the applicant provide sufficient justification as to why JARC funding is needed for this project? **(5 points)**

f. **Innovation (maximum 10 points)**

- Is the proposed project an innovative solution to addressing the need, and could the innovations be applied to other services in the region? **(5 points)**
- Are there elements of the project that are environmental sustainable (including the use of alternative fuels and clean air vehicles)? **(5 points)**
New Freedom Program Evaluation and Scoring Criteria

The following information and scoring criteria will be used to score and rate project applications for New Freedom (NF) funding.

A. **Project Need (20 points):** The project application should directly address transportation gaps and/or barriers identified in the 2010-2014 Coordinated Public Transit and Human Services Transportation Plan (Coordinated Plan), and demonstrate how the project was derived from the strategies identified in the Coordinated Plan.

B. **Goals and Objectives (10 points):** The project application should clearly state the overall program goals and objectives, and demonstrate how the project is consistent with the objectives of the New Freedom grant programs, as described in the Federal Transit Administration’s circulars. The application should clearly describe the project’s purpose and scope.

C. **Implementation Plan (15 points):** For projects seeking funds to support program operations, applicants must provide a well-defined service operations plan, including days and hours of operation for operating grants. The applicant must describe implementation steps and timelines for carrying out the plan. The project application should indicate the number of persons expected to be served, and the number of trips (or other units of service) expected to be provided. The service operations plan should identify key personnel assigned to this project and their qualifications. Project sponsors should demonstrate their institutional capability to carry out the service delivery aspect of the project as described.

For projects seeking funds for capital purposes, the applicant must provide a solid rationale for use of New Freedom funds and demonstrate that no other sources of funds are appropriate to meet this need, as well as provide an implementation plan and timelines for completing the capital project.

D. **Project Budget (15 points):** Project Applicants must submit a clearly defined project budget, indicating anticipated project expenditures and revenues, including documentation of matching funds. Proposals should address long-term efforts and identify potential funding sources for sustaining the service beyond the grant period. Proponent shall demonstrate how using this funding leverages resources to the maximum possible extent.

E. **Financial and Environmental Sustainability (10 points):** The highest point scores will be awarded to those that have a high probability of becoming self sufficient (e.g. not require New Freedom funding) in future years. Points may also be awarded for projects that are environmentally sustainable or promote good environmental stewardship.

F. **Coordination and Program Outreach (15 points):** Proposed projects will be evaluated based on their ability to coordinate with other community transportation and/or social service resources. Applicants should clearly identify project stakeholders, and how they will keep stakeholders involved and informed throughout the project. Project sponsors should also describe how they would promote public awareness of the project. **Letters of support from key stakeholders should be attached to the grant application.**
G. **Program Effectiveness and Performance Indicators (10 points):** The project will be scored based on the project sponsor’s ability to demonstrate that the proposed project is the most appropriate match of service delivery to the need, and is a cost-effective approach. Applicants also must identify clear, measurable outcome-based performance measures to track the effectiveness of the service in meeting the identified goals. If an organization operates similar services, it must show how this service compares in terms of efficiency and cost-effectiveness with other services currently being operated. For grants that involve providing a transportation service, the cost per passenger trip must be indicated, as well as the estimated typical trip length.

A plan should be provided for ongoing monitoring and evaluation of the service, and steps to be taken if original goals are not achieved. Sponsor should describe their steps to measure the effectiveness and magnitude of the impact that the project will have on disabled residents.

H. **Innovation (5 points):** Applicants should provide new or innovative service concepts or facilities that have the potential for improving access and mobility for the target populations and may have future application elsewhere in the region.
New Freedom Program
SANDAG Subrecipients

Jewish Family Service - UC Rides & Smiles
Trip-Based Services/Volunteer Driver Program
No. of months in operation during FFY 09: 12 months
Total one-way trips: 1632

Service description
UC Rides & Smiles launched September 2008, as a result of the generous New Freedom funding. Rides & Smiles is an innovative, primarily volunteer-based transportation service. Volunteer drivers provide rides utilizing their personal vehicles; Jewish family Service (JFS) reimburses mileage and provides secondary auto insurance. The service is available to individuals residing in zip codes 92037, 92111, 92117, 92121, and 92122. JFS is working with the Jewish Senior Services Council to expand the transportation services available to older adults by developing the program On the Go: Transportation Solutions for Older Adults. UC Rides & Smiles falls under the umbrella of On the Go. Most Rides & Smiles rides are provided by volunteers. If a volunteer is not available, the ride is either provided by an On the Go paid back-up driver or dispatched to a yellow cab taxi for completion. As noted below, 86 percent of rides in Federal FY 09 were provided by volunteer drivers.

Evaluation
JFS measures the performance of the UC Rides & Smiles service against the following yearly goals/objectives:

Goal: A minimum of 25 drivers will be enrolled.

Result: 35 drivers were enrolled.

Goal: A qualified subcontractor will be secured to transport those seniors and individuals with disabilities who require wheelchair or other equipment assistance.

Result: Pineapple Express was secured and a MOU was signed.

Goal: The program will serve a minimum of 75 individuals, providing a minimum of 1,300 trips.

Result: 1,632 rides were provided to 282 enrolled riders.

Goal: A minimum of 95 percent of clients responding to quarterly satisfaction surveys will rate the services provided as “Good” or “Excellent.”

Result: Nearly 100 percent of clients rated the services “Good” or “Excellent.”
Problems are identified through the program monitoring process and addressed immediately by the Program Coordinator, who communicates with riders and drivers daily, as needed. As this program is based on a proven model, project staff does not anticipate any obstacles that would interfere with the successful achievement of goals and objectives.

Accomplishments
The UC Rides & Smiles service had a tremendous first year. Rides & Smiles received the 2009 Beverly Foundation STAR Award as a program model of excellence and had the following community impact:

In FFY 2009, the UC Rides & Smiles program provided 1,396 volunteer rides, 244 paid driver rides, and 12 Yellow Cab taxi rides, for a grand total of 1,632 rides. There were 252 new riders and 282 total enrolled riders.

In conjunction with the San Diego County Volunteer Driver Coalition, a successful Volunteer Driver Training and Appreciation Event was held September 15, 2009, at the California Department of Transportation (Caltrans) District 11 building. Approximately 100 individuals were in attendance. The event consisted of two hours of volunteer training, lunch, an inspirational speaker, and special recognition awards for volunteers and their service.

Lessons learned
Spearheading a new community service, particularly a volunteer-based one, requires community support. It is essential to engage community leaders, groups, and clubs from the beginning, and to stay in continuous contact with them. Relationship-building is a key element to a successful community-based service and to successful volunteer recruitment.

City of La Mesa - Rides4Neighbors
Trip-Based Services/Volunteer Driver Program
No. of months in operation during FFY 09: 12 months
Total one-way trips: 4,334

Service description
The New Freedom funded project includes the operation, management and expansion of a volunteer driver transportation service. The geographical area expanded beyond the City of La Mesa boundaries in FFY 2009 to include unincorporated areas outside the La Mesa city limits, including Mt. Helix, Casa de Oro and Spring Valley. In January 2009 the project launched the Discount Taxi Scrip component after hiring a part-time Clerical Asst. In collaboration with Yellow Cab, the project purchases scrip booklets worth $20 of taxi service and sells to qualified older adults and persons with disabilities for $10 per booklet. Taxi scrip works in combination with volunteer driver services, especially when drivers are unavailable or ride requests are made with insufficient notice for ride coordination. The project also includes a partnership with La Mesa First United Methodist Church as a subcontractor for the provision of a weekly shuttle small bus service for shopping. Eligible riders schedule the service in advance. The bus picks up riders from 10 a.m. to 11 a.m. and transports to the Grossmont Center for essential shopping. The shuttle also can accommodate drops at medical facilities adjacent to the hospital and the shopping center for lab appointments, check-ups, etc.
Evaluation
During the early part of FFY 2009, we conducted a project evaluation component by administering a telephone questionnaire to 55 riders. The survey was designed to gather, compile and compare data on client-perceived ease of finding and utilizing transportation (1) prior to Rides4Neighbors and (2) after enrollment in the service. We continually monitor the progress of the program against the proposed program schedule. We recognize that we have been optimistic in phase-in of the various program components. We continually review the cost-effectiveness factor and make adjustments, such as assigning rides based on the volunteer’s residential location, to avoid paying unnecessary mileage for volunteers to travel an excessive distance to pick up a rider.

Accomplishments
Our most significant accomplishment has been the acquisition of the RideScheduler webware, which enables the project to enhance its efficiency by posting ride requests and ride activity on an internal website to which only active drivers and administrators have access. The scheduling system allows drivers to choose their own rides and eliminates the need to continually circulate emails about rides needed and rides that have been picked up. The ride scheduler has reporting features that enable drivers to complete mileage reports online, as well as features that report on trip categories (medical, essential shopping, personal appointments, etc.)

Lessons learned
The advice we have to share concerns project staffing, particularly hiring the right people and going through a complete and thorough hiring process, regardless of the number of hours. In December 2008 we conducted a full job search for the part-time 20 hrs per week clerical assistant. We had two department professionals interview 14 people, after receiving 58 applications. After narrowing the field to two candidates, we did second interviews and hired an individual who had, at various career points, conducted community presentations, outreach, and customer/client processing for program or services. For longevity considerations, we were seeking someone who was not ultimately looking for a full time job, had computer proficiency, worked in a crowded office with distractions and has had extensive customer service experience. Unfortunately, after three months it became apparent that the employee was not computer proficient and was unable to communicate accurate program information to prospective riders. We wished that we had given a computer proficiency test prior to hiring. Also we wished that we had required in the posting material that references must include former supervisors.

City of Oceanside - Senior Shuttle
Trip-Based Services/Volunteer Driver Program
No. of months in operation during FFY 09: 11 months
Total one-way trips: 2937

Service description
The Senior Shuttle program is a contracted door-to-door shuttle service for seniors age 65 years and older. The shuttle services, contracted to American Logistics Company, are on-demand with a reservation window from one week up to 60 minutes. The shuttle service cost to the senior is $5.00 per one-way trip. The program is designed to have up to 267 one-way trips available for reservation each month; with 134 trips available to ambulatory seniors and 134 trips available to nonambulatory seniors. Any unused trips roll over into the next month and are used based on the demand for service. The program’s implementation under New Freedom grant funds occurred from
October 1, 2008, to June 30, 2009, and included: the City registering seniors ages 65 years and older into the program and sends the registration list to American Logistics; American Logistics personnel then take the reservation calls, dispatches shuttles, and invoice the City. Trips are provided for medical appointments, grocery store shopping, pharmacy trips, social trips, church, and hair appointments.

**Evaluation**
The primary source of evaluation during the period of October 1, 2008, through June 30, 2009, was progress made toward quantifiable measurements. As previously stated enough funding was available for up to 134 nonambulatory trips and 134 ambulatory trips each month. This ensured that enough funding could pay for the higher cost of implementing a wheelchair accessible van. During FFY 2009, Senior Shuttle Program provided 2,468 ambulatory trips and 156 nonambulatory trips. The number of trips provided in each category tells us that seniors preferred to transition into a sedan rather than use a ramp into a wheelchair accessible van. See the table below for the number of rides per month. This evaluation does not represent use of the program by seniors with disabilities. Many seniors with disabilities have used the program but did not require a wheelchair accessible van. Seniors utilizing more of the sedan shuttles actually enabled the program to provide more rides to seniors overall.

**Accomplishments**
The shuttle program was able to expand services with the assistance of New Freedom grant funds. The program was able to expand trip boundaries to the Encinitas Scripps Memorial medical complex, Carlsbad Kaiser medical offices, and any medical facilities in Vista. Additionally, the transit center in Vista was added to the trip boundaries. In addition to expansion of services, the program came to the aid of residents that are not necessarily the required “senior” age. One Oceanside resident that is slightly under the required age of 65 years or older was in need of transportation services because due to surgery she was temporarily blind. This was an individual with a disability, although temporary, she was able to receive services under this grant.

**Lessons learned?**
The biggest lesson learned from this program continues to be the need for flexibility and to make adjustments as we go to resolve issues that arise through evaluation. This enables the funds to be maximized and provide the broadest level of service to the community as possible.

**City of Oceanside - Volunteer Driver**

**Trip-Based Services/Volunteer Driver Program**

| No. of months in operation during FFY 09: | 12 months |
| Total one-way trips: | 334 |

**Service description**
The City of Oceanside Volunteer Driver Program is a transportation service for residents age 65 years and older that have a physical limitation or special need for assistance on their excursions for medical, essential shopping, personal business, and other community transportation trips. Senior citizens, even those with disabilities or debilitating medical conditions, do not necessarily qualify for paratransit type services; or the lengthy process of qualifying and service delivery is too much of a burden to a frail senior. Hence, the volunteer driver program was established to assist the most-frail senior in need of transportation in Oceanside, California. The program's implementation includes: establish a pool of up to 20 screened, insured, and trained volunteer drivers who will receive
mileage reimbursements for the use of their own personal vehicles to drive seniors to and assist during medical appointments, shopping needs, pharmacy visits, and other social needs. The program will be coordinated by a newly hired part-time transportation coordinator at the Oceanside Senior Citizens Center. The coordinator assists in developing volunteer packet materials, provides the volunteer orientation, schedules rides, processes mileage reimbursements, and addresses any client concerns with the Senior Services Supervisor.

**Evaluation**
The primary source of evaluation during the period of October 1, 2008, through September 30, 2009, was progress made toward quantifiable measurements. Progress included: (1) an additional four volunteers were successfully recruited, (2) a total of 2,322 miles were driven by volunteers, (3) of those miles - a total of 334 one-way rides were provided, and (4) one of the most active volunteers exceeded 150 miles per month on several occasions. Evaluation of the performance progress tells us that progress is dependent on the number of successful volunteers recruited and the level of participation those volunteers have in the program. Emphasis is placed on successfully recruiting quality volunteers.

**Accomplishments**
There were three notable accomplishments during this period. Considering that the program’s overall progress is determined by the successful recruiting of quality volunteers, two of the accomplishments were: (1) successfully recruiting an additional four volunteers, and (2) one of the volunteers becoming so active that she exceeds the 150 miles per month. The third accomplishment relates to the qualitative benefits of the program. An Oceanside resident with a new disability was in the process of signing up for North County Transit District’s (NCTD’s) LIFT program which can be a lengthy process. In the interim, she required assistance in traveling to her medical appointments. Although her age puts her under the program requirements, our program exercised its flexibility to provide her accommodations until she is receiving services under the LIFT program. This demonstrates the importance of this type of flexible program and its ability to supplement other transportation services in the community.

**Lessons learned**
The biggest lesson learned from this program continues to be the difficulty of recruiting quality volunteer drivers. The four additional successfully recruited volunteers this period did not represent the efforts that were put forth in trying to recruit volunteers. In fact, an additional three volunteers were successfully processed through the City’s volunteer process; however, they never responded to scheduling requests. This goes to show that even what appears to be a quality volunteer may turn into someone that is much less committed than they had portrayed to be in the interview stage.
Full Access and Coordinated Transportation - Mobility Management

Information-Based Services/Mobility Manager service

No. of months in operation during FFY 09: 12 months

No. of customer contacts: 273

Service description

The FACT Mobility Management project provided development and maintenance of a centralized transportation service database to handle scheduling and dispatch of trips. Under New Freedom funding, STRIDE (Specialized Transportation Referral and Information for the Disabled and Elderly), a comprehensive web-accessible database of specialized transportation information and providers in the San Diego region, was operational throughout all of Federal FY 2009, with an average of 110 website hits per day. FACT continued mobility management and coordination efforts with Interfaith Services, County of San Diego, All Congregations Together, and Union of Pan Asian Communities (UPAC).

Evaluation

FACT has seven (7) hours of weekday phone coverage per day to ensure individuals can have their transportation requests. A log is maintained by phone call to identify the nature of correspondence and ability to resolve the person's request. During FFY 2009, 273 referred calls were logged.

Accomplishments

- Highlight your greatest accomplishments. Describe any especially successful or innovative elements.

During FFY 2009, Faith Based Survey and STRIDE provider updates were completed. The Faith Based survey was conducted to measure the interests of potential partners in coordinated transportation. Among the concerns identified were insurance, resources, and parish attrition. The more robust and reflective of the aggregate service environment the site is will empower individuals to make the most informed choice for their transportation needs. The STRIDE provider updates enhanced the utility of the STRIDE website and further maximized it for consumers who need access to an expansive list of transportation resources in the San Diego Region. Business Plan guidance and development continued through the FACT Technical Advisory Committee. A memorandum of understanding (MOU) was finalized with Union of Pan Asian Communities (UPAC) for small scale brokerage partnership.

Lessons learned

- Thoroughly analyze the marketing/advertising aspects of a service. Intuitive phrases like "Need a ride, click at STRIDE..." were promotional, but misleading. The phrase "need a ride..." implies that one is definitely available, which would not be known until the request is reviewed. One certainly wants to capture the market they are looking to serve, but ensure it is done in the most informative and effective way.
New Freedom Program
Direct Recipients
NCTD - Mobility/Travel Training
Information-Based Services/One-to-one transit (“Travel”) training
No. of months in operation during FFY 09: 12 months
No. of persons trained: 720

Service Description. The funds support the Mobility/Travel Training program to provide opportunities for people with disabilities in northern San Diego County to increase their mobility options. To achieve this, NCTD provides trainers to demonstrate, train and assist passengers of NCTD’s SPRINTER, BREEZE, and COASTER services in navigating the transit system by using the Rider’s Guide and its contents to create and plan travel options and to navigate the multiple-mode transportation system to get to their intended destination and back with confidence. NCTD Trainers also provide individualized assessments/trainings on wheelchairs, scooters and other mobility devices on NCTD’s transit system.

Evaluation
NCTD Mobility/Travel Training: This program is extremely popular and NCTD’s Mobility/Travel trainer continues to receive more requests than she can provide. Program evaluation criteria include: number of requests for additional training and feedback from participants. As a result of increased customer demand, NCTD has increased funding requested for this program.

Accomplishments
During the period from July 2008 through June 2009, NCTD introduced 720 individuals to the program at various group mobility/travel outreach events, and all individuals have participated in the program.
Individuals participated in trip planning and day trips. NCTD has also provided individualized assessments and wheelchair/scooter boarding training to numerous individuals. This program is extremely popular and has been expanded as a result.

Lessons Learned
Training elderly and disabled individuals to use public transit increases their mobility and is cost-effective.

JARC Program
Direct Recipients

Metropolitan Transit System (MTS) - Route 905
Trip-Based Services/Fixed Route
No. of months in operation during FFY 09: 12 months
Total one-way trips: 27,883
Route length (one-way in miles): 9.346
Number of targeted jobs: 16,608

Service description
Route 905 operates between the Otay Mesa Border Crossing and the Iris Avenue Trolley station. It is
a fixed-route service operating with standard coaches. On weekdays, it operates with a base 30-minute frequency and improves to 15-minute frequencies in the AM and PM peak periods. On weekends, it operates with 30-minute service all day. Overall, 85 weekday one-way trips and 27 weekend one-way trips are operated. Service is provided between the Iris Avenue Trolley Station and the Otay Mesa Border Crossing via State Route (SR) 905, and the industrial areas in Otay Mesa along Siempre Viva Road, Airway Road, and surrounding streets.

**Evaluation**
MTS evaluates its routes based on various performance measures. The performance measures used most frequently are productivity measures (passengers per revenue hour) and cost efficiency measures (farebox recovery rate and subsidy per passenger). For FY 09, Route 905 averaged 25.3 passengers per hour; had a farebox recovery rate of 40.6 percent; and had a $2.03 subsidy per passenger. The fixed-route bus system averages are 31.1, 40.6 percent, and $1.43 respectively. Route 905 ranks in the top half of routes in farebox recovery rate, and is within the top 60 percent of routes in terms of subsidy per passenger and passengers per hour.

**Accomplishments**
Despite lower gas prices and a down economy, ridership on Route 905 has remained relatively steady, as passengers per hour have only dropped from 25.5 to 25.3. Continuing this route has enabled thousands of passengers continue to access the jobs in the Otay Mesa area. In terms of innovation, MTS holds one of the largest service contracts with a private provider (Veolia) in the United States. This contract is a result of consolidating several smaller operating contracts for MTS, Chula Vista Transit and National City Transit. As a result of the efficiency of scale, the cost per mile for Route 905 service is extremely competitive at $5.60, including energy.

**Lessons learned**
Route 905 service was started many years ago. As with any route, MTS consistently monitors the route and continues to look for ways to improve service. MTS is consistently monitoring passenger activity -- to determine when and where passengers are using the system -- and on-time performance. If needed, schedules are adjusted three times annually.

**MTS – Route 30**
Trip-Based Services/Fixed Route
No. of months in operation during FFY 09: 12 months
Total one-way trips: 8,325
Route length (one-way in miles): 24.07
Number of targeted jobs: 200,000

**Service description**
Route 30 operates between downtown San Diego and University Towne Centre (UTC) via Old Town, Pacific Beach, La Jolla, and UC San Diego. On weekdays, it operates with a 15-minute frequency, and on weekends (JARC-funded) it operates with 30-minute service all day. It is a fixed-route service operated with standard coaches. Overall, 75 weekend one-way trips are operated. Service is provided between downtown, Old Town, and Pacific Beach on Interstate 5. The remainder of the route uses local streets through Pacific Beach, La Jolla, UC San Diego, and University City. Late-night trips serve residential communities south of La Jolla Village Drive.
Evaluation
MTS evaluates its routes based on various performance measures. The performance measures used most frequently are productivity measures (passengers per revenue hour) and cost efficiency measures (farebox recovery rate and subsidy per passenger). For FY 09, Route 30 averaged 29.7 passengers per hour; had a farebox recovery rate of 30.8 percent; and had a $2.14 subsidy per passenger. The fixed-route bus system averages are 31.1, 40.6 percent, and $1.43 respectively. Route 30 ranks near the top 1/3 of routes in terms of passengers per hour, and in the top 2/3 of routes in the cost efficiency measures.

Accomplishments - Highlight your greatest accomplishments. Describe any especially successful or innovative elements.
Route 30 served nearly one half million passengers (474,687) in FY09. This represented a 24 percent increase from FY 08. Additionally, all performance measures (see above) improved from FY 08 by at least 10 percent.

Lessons learned - What advice would you give to someone else starting a service like yours? What do you wish you had known when you started the service?
Route 30 service was started many years ago. As with any route, MTS consistently monitors the route and continues to look for ways to improve service. MTS is consistently monitoring passenger activity -- to determine when and where passengers are using the system -- and on-time performance. If needed, schedules are adjusted three times annually.

MTS - Route 960
Trip-Based Services/Fixed Route
No. of months in operation during FFY 09: 12 months
Total one-way trips: 3556
Route length (one-way in miles): 20.782
Number of jobs targeted: 155,000

Service description - Provide a detailed description (1-2 paragraphs) of the JARC-funded service provided during FFY 2009. Please indicate the route name and/or number, if applicable, and describe the route alignment or service.
Route 960 operates between the Euclid Avenue Trolley station and University Towne Centre via Mid-City, Kearny Mesa, and University City. It is a fixed-route service operated with standard coaches and it operates only on weekdays and only in the peak hours. Overall, 14 weekday one-way trips are operated. Heading north, service is provided between the Euclid Avenue Trolley station and the Mid-City Transit Plazas (University Avenue and El Cajon Boulevard) via SR 94 and SR-15. Continuing north, the route operates on I-15 to Balboa Avenue, Kearny Villa Road, Clairemont Mesa Boulevard, and Ruffin Road, before heading west on SR 52 and north on I-805 to the La Jolla/University City area. Route 960 finishes its trips by serving Nobel Drive, Judicial Drive, Golden Haven Drive, Towne Center Drive, Executive Drive, and Genesee Avenue before entering University Town Centre.

Evaluation
MTS evaluates its routes based on various performance measures. The performance measures used most frequently are productivity measures (passengers per revenue hour) and cost efficiency measures (farebox recovery rate and subsidy per passenger). For FY 09, Route 960 averaged
29.0 passengers per hour; had a farebox recovery rate of 31.1 percent; and had a $2.70 subsidy per passenger. The fixed-route bus system averages are 31.1, 40.6 percent, and $1.43 respectively. Route 960 ranks in the top 40 percent of routes in terms of passengers per hour, and in the top two-thirds in terms of farebox recovery.

Accomplishments
Ridership has fallen slightly, due to lower gas prices and a declining economy. However, this route is still one of the more successful express routes in the system. It is above the express-route system average in both passengers per hour and farebox recovery rate, showing that it is a key piece of the MTS fixed-route network. In terms of innovation, MTS holds one of the largest service contracts with a private provider (Veolia) in the United States. This contract is a result of consolidating several smaller operating contracts for MTS, Chula Vista Transit, and National City Transit. As a result of the efficiency of scale, the cost per mile for Route 960 service is extremely competitive at $5.60, including energy.

Lessons learned
Route 960 service was started many years ago. As with any route, MTS consistently monitors the route and continues to look for ways to improve service. MTS is consistently monitoring passenger activity -- to determine when and where passengers are using the system -- and on-time performance. If needed, schedules are adjusted three times annually.

NCTD - SPRINTER Weekend Service
Trip-Based Services/Fixed Route
No. of months in operation during FFY 09: 12 months
No. of one-way trips: 1760
Route length (one-way in miles): 22
Number of targeted jobs: N/A

Service Description
On Saturday, July 12, 2008, NCTD commenced enhanced weekend and holiday service for the SPRINTER light rail service. This service improves access for workers with nontraditional job schedules and provides more convenient connections for workers in northern San Diego County who transfer between SPRINTER and the hourly bus routes on weekends when service is less frequent. This enhanced service is being funded by this JARC grant and increases the frequency on weekends and holidays from hourly service to every 30 minutes between the hours of 10:00 a.m. and 6:00 p.m. (approximately). Hourly Sprinter service will continue to run before 10:00 a.m. and after 6:00 p.m. on weekends and holidays. NCTD contracts with Veolia for provision of SPRINTER service.

Evaluation
The SPRINTER weekend service is still relatively new and has been affected by recent economic turndown. NCTD evaluates this project (and all services) based on ridership data.
**Accomplishments**
NCTD’s JARC project is consistent with the intent of the JARC program to provide transportation access to welfare recipients and low-income families. SPRINTTER increased frequency weekend service provides greater transportation opportunities, including meaningful connections, to this targeted group as well as others.

**Lessons Learned**
It takes time to develop consistent ridership for new services. NCTD’s advice is “Do not over estimate your ridership.” Do not under estimate the expense of what it take to what it takes to operate the service to meet the needs of JARC’s targeted group. Minimize changes to service once established. Community Outreach is essential for the project to be successful.
San Diego Association of Governments

TRANSPORTATION COMMITTEE

June 18, 2010

AGENDA ITEM NO.: 4

Action Requested: APPROVE

DRAFT FY 2011 TRANSIT AGENCY OPERATING BUDGETS

File Number 1500400

Introduction

Consistent with its role as the consolidated transportation agency, SANDAG is responsible for approving the transit agency budgets for funding. The Transportation Committee approved the guiding principles and objectives (Attachment 1) for development of the FY 2011 transit operating budgets on January 15, 2010, and the Board of Directors approved the FY 2011 transit revenue apportionments on February 26, 2010. These guiding principles and revenue apportionments have been used by the transit agencies in preparing their FY 2011 budgets.

Discussion

As identified in the Transition Plan adopted on February 28, 2003, one of SANDAG’s responsibilities is to examine the transit agencies’ budgets and the budget process in an effort to obtain efficiencies. To help achieve this goal, SANDAG and the transit agencies review and update the guiding principles each year, and SANDAG provides funding estimates for those revenues distributed through SANDAG. The transit agencies use this information as input into their budget development process. Attachments 2 through 5 contain narrative and numerical summaries of key budget information as presented by North County Transit District (NCTD) and the Metropolitan Transit System (MTS).

Matt Tucker (Executive Director for NCTD), Richard Hannasch (Director of Administration and Finance for NCTD), and Paul Jablonski (Chief Executive Officer for MTS) will give oral presentations for their respective agencies.

LAUREN WARREM
Director of Finance

Attachments: 1. FY 2011 Transit Agency Budget Preparation - Guiding Principles and Objectives
   2. MTS Draft Operations Budget
   3. MTS Draft Operating Budget Summary (A – C)
   4. NCTD Draft Total Operating Budget
   5. NCTD Draft Operating Budget Summaries (A – E)

Key Staff Contact: Tim Watson, (619) 699-1966, twa@sandag.org
FY 2011 Transit Agency Budget Preparation
Guiding Principles and Objectives

The following guiding principles and objectives were developed over the last several years and have been reviewed and updated with input from the North County Transit District (NCTD) and Metropolitan Transit System (MTS) staff. The Transportation Committee reviewed and approved the FY 2011 guiding principles on January 15, 2010.

1. The overarching goal is to work toward achieving a sustainable level of service, whereby recurring revenues are sufficient to cover recurring expenditures and includes a multi-year operating plan as a foundation. When necessary, this approach allows for incremental service reductions, rather than a one-time severe cut in services.

2. On the revenue side, the fare structure will be reviewed each year as part of the budget process, and SANDAG should aggressively pursue new recurring revenue sources as part of the legislative process.

3. The Regional Short Range Transit Plan (RSRTP) is now developed as part of the Coordinated Public Transit-Human Services Transportation Plan, as approved in December 2009. A key purpose of the consolidated plan is to establish regional productivity guidelines for service, recognizing that areas with different levels of urban development (e.g., urban vs. rural) have different services and guidelines. The plan provides a five-year blueprint for the enhancement of the regional transit system, and is updated annually.

4. There should be flexibility to readjust services each year to react to changing circumstances (e.g., passage of new federal transportation legislation, changes in revenue received, and changing ridership patterns).

5. It is the responsibility of SANDAG to prepare fund estimates, including allocations, and to provide this information to the transit operators by March 1 of each year. Due to the rapidly changing economic conditions, this Information is currently being shared with MTS and NCTD staffs as updates become available.

6. The transit operators will use a zero-based budget approach for the annual FY 2011 budget, using high and low ranges provided by SANDAG for projecting FY 2012 through FY 2015. The FY 2012 to FY 2015 projections shall be presented at a highly summarized level.

7. Preserve current service levels as much as possible and evaluate opportunities for cost efficiencies and opportunities for potential implementation of changes as outlined in the federally mandated Coordinated Public Transit - Human Service Transportation Plan.

8. Define recurring operating revenue to include the use of up to the maximum amount of Transportation Development Act, State Transit Assistance, TransNet, and federal formula funds for operations. The level of funds to be used for operations is a decision to be made by the transit agencies as they proceed through the budget process and balance operating and capital needs. Recurring operating revenue shall also include passenger fares and any other operating revenues that the transit agency can demonstrate are stable, reliable, and long-term in nature.

9. Provide budget information, financial reporting, and quarterly performance measurements in a standardized format consistent with TDA reporting requirements.
Agenda

SANDAG BOARD OF DIRECTORS
TRANSPORTATION COMMITTEE MEETING

June 18, 2010

Subject:

MTS: DRAFT OPERATIONS BUDGET

RECOMMENDATION:

That the SANDAG Board of Directors receive the Combined MTS FY 2011 Operating Budget Report.

Budget Impact

None at this time.

DISCUSSION:

MTS BUDGET STATUS REVIEW

Staff held a public hearing and received final budget approval from the MTS Board of Directors on June 10, 2010.

Historical Recap – Operations / Budget

As a recap of the current financial position and objectives for MTS, the following is a review of historical operations and budgetary information over the past few years.

Fiscal Year 2010 Operational Highlights

• MTS Named Outstanding Public Transit System of 2009

The American Public Transportation Association (APTA) has selected the Metropolitan Transit System as the most Outstanding Transit System of the year...
for all agencies in North America carrying more than 30 million passengers annually. This is one of the most prestigious awards in the transportation industry. MTS was judged on 14 different quantitative measures over a three year period (fiscal years 2006-2008), including:

<table>
<thead>
<tr>
<th>Measure</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ridership</td>
<td>Up 12.3 percent</td>
</tr>
<tr>
<td>Preventable accidents</td>
<td>Down 14 percent in MTS Bus</td>
</tr>
<tr>
<td>Driver-related complaints</td>
<td>Down 26.8 percent</td>
</tr>
<tr>
<td>Costs per revenue hour</td>
<td>Down 7 percent</td>
</tr>
<tr>
<td>Passengers per revenue hour</td>
<td>Up 200 percent on some routes where MTS reallocated resources from low-productive to high-productive areas</td>
</tr>
<tr>
<td>On-time performance</td>
<td>Up 6 percent</td>
</tr>
<tr>
<td>Fare revenue</td>
<td>Up 12 percent</td>
</tr>
<tr>
<td>Subsidy per passenger</td>
<td>Down 14.1 percent</td>
</tr>
<tr>
<td>Fleet replacement</td>
<td>MTS has replaced 224 of its vehicles over the last three years, 88 of which are with environmentally-friendly engines, which are either compressed natural gas or gasoline-electric hybrids.</td>
</tr>
</tbody>
</table>

MTS’ performance on these measures was then compared to the 44 other major North American cities in both the U.S. and Canada, and MTS received a perfect score of 14 out of 14 to earn this major award.

- **Continued Investment in Security**

  Since 2005, the MTS Transit Enforcement Department has been awarded a total of $6.4 million under the Department of Homeland Security’s Transportation Security Grant Program (TSGP). In addition, California Proposition 1B funds in the amount of $2.7 million have been awarded to MTS for the purpose of security improvements to the system. This funding has been used to enhance the security at all MTS facilities, and install closed circuit television (CCTV) cameras in the fleet and at transit stations. By the end of 2010, 26 stations will be canvassed by over 250 CCTV cameras. All of this has helped MTS realize a 29% reduction in Part I incidents and 4% reduction in Part II arrests in calendar year 2009 versus 2008.

- **Super Loop Service**

  Super Loop, the new rapid bus circulator route in the University City area, was included in the voter-approved TransNet II Ordinance list of transit projects. Full construction of the project is not scheduled for completion until 2011; however, MTS and SANDAG began a pilot service in the area in June of 2009. The pilot includes running service in both directions every 10 minutes in the peak on a loop route, serving nine stops between University of California San Diego’s campuses, University Towne Centre, and La Jolla Village Square. The service will carry a projected 840,000 riders during fiscal year 2010.

- **Trolley Blue and Orange Line Rehabilitation Project**

  Progress continues to be made on the Trolley Blue and Orange Line Rehabilitation and Low Floor Vehicle Project. Both the Blue and Orange Lines will be retrofitted to accept low floor light rail vehicles (LRVs) as part of the overall project, and MTS will procure 57 vehicles to ensure at least one new vehicle per train. In addition, this project will rehabilitate track, track switches, overhead
catenary wire, stations, grade crossings, crossing signal equipment, signal cases and substation enclosures and activation switches. MTS anticipates the replacement of catenary in the summer of 2010 and, in conjunction with SANDAG, are in the process of designing stations and shelters along the Blue Line. MTS joined with the Utah Transit Authority to contract with Siemens for an ultra short low floor vehicle that better suits the shorter blocks in downtown San Diego. This procurement remains on schedule with the first new LRVs arriving in September 2011.

- **ADA Paratransit Services**

MTS provides Access and Suburban paratransit services for individuals not able to use our fixed route bus system. These services are provided in full compliance with Americans with Disabilities Act and MTS provides nearly 350,000 passenger trips annually. This service is provided by 120 MTS owned paratransit vehicles operated by a contracted provider. In March 2010, MTS completed a negotiated procurement for a new contract with First Transit for a base period of five years with two, two-year option periods. With the property that MTS is expected to acquire, MTS fiscal year 2011 cost will decrease by 5% from $59.52 to $56.40 per revenue hour.

- **Compass Card**

The Compass Card is a multiyear project that will create a fare collection system for the San Diego region’s fixed-route bus and rail operations. The Compass Card is being designed by Cubic to provide a better fare product for transit customers and to allow the area’s transit operators to collect enhanced ridership and revenue data. The plastic cards will be reusable and reloadable and have replaced almost all paper fare media for MTS and North County Transit District (NCTD) operations in May 2010.

- **Energy Costs**

MTS spends over 12% of its annual operating budget on energy costs, over $26 million per year on average. With the fiscal year 2011 budget, MTS expects to drop that to 9.8% of the operating budget, a savings of $4.0 million. In 2009, MTS began purchasing compressed natural gas (CNG) directly from the suppliers at market rates. In 2010, MTS expects to do the same with electricity by participating in California’s Direct Access program. In addition, MTS recently completed a negotiated procurement for CNG facility upgrades and maintenance, which will produce a substantial operating expense savings.

**Historical Budgetary Recap**

The long-term ongoing goal of the MTS operating budget is to fund operations solely utilizing recurring revenues. Changes in the economic environment have created significant budget challenges in the past several years. Late in the 2007 fiscal year, MTS learned that sales tax receipts would be lower than anticipated, starting the decline of sales tax receipts that has continued through fiscal year 2010. The decline in sales tax revenue impacts MTS’s TransNet, Transportation Development Act (TDA) and State Transit Assistance (STA) revenues. For comparison sake, in fiscal year 2007, TDA, TransNet 1 and STA made up 72% of the $150 million subsidy revenue budget. By the end of fiscal year 2010, TransNet 1, TDA and the now eliminated STA made up 57% of
the $122 million subsidy revenue budget, an annual impact of over $38 million compared
to fiscal year 2007.

The significant loss of subsidy revenues experienced by MTS in the past several years
has forced a number of initiatives to reduce costs and generate revenue. These
included service and fare adjustments, management personnel reductions, management
benefit reductions, increased advertising and real property revenues, and belt-tightening
initiatives. The most recent service adjustments took place in February 2010 and
included a substantial reduction to Sunday service.

In order to offset these declining subsidy revenues and to balance the fiscal year 2010
budget, the MTS Board of Directors approved the use of one time funding totaling $13.6
million. This included $5.9 million of American Recovery and Reinvestment Act (ARRA)
preventative maintenance, $6.7 million shifted from the Capital Improvement Program
(CIP) and another $1.0 million from contingencies reserves.

Review of MTS Financial Status

Staff began the fiscal year 2011 budgetary process in November 2009. Despite belt-
tightening measures, reduced debt service costs and lower than anticipated fuel costs,
staff presented a budget shortfall of $10.8 million to the MTS Board of Directors in March
2010. This was primarily due to the use of one time funds to balance the fiscal year
2010 budget in the wake of the continued reductions of TDA and TransNet revenues.
The MTS Board of Directors reiterated its desire to use one time funding to help bridge
the shortfall, and $8.2 million was shifted from the Capital Improvement Program (CIP).

In May 2010, MTS staff refined revenue and expense budgetary assumptions and the
MTS Board of Directors was presented a balanced draft budget, utilizing the $8.2 million
shifted from CIP, but without any additional service reductions, fare increases or utilizing
any contingency reserves.

FY 2011 Overview

As indicated within Attachment 3B, the fiscal year 2011 total budgeted revenues are
projected at $219,326,000, and total projected expenses are budgeted at $219,326,000,
resulting in a balanced budget for fiscal year 2011.

• FY 2011 Revenue

Please refer to Attachment 3A for a summary of fiscal year 2011 budgeted
revenues.

• FY 2011 Operating Revenues

Combined passenger revenue for fiscal year 2011 is projected to increase
$2,841,000 (3.3%) compared to midyear-adjusted Fiscal Year 2010 levels and is
primarily due to anticipated ridership increases.

• FY 2011 Other Revenues

Total other revenue is budgeted to decrease by $236,000 (-3.8%). This is
primarily due to reduced advertising revenues projected within the fiscal year, as
well as a decrease in the projected interest income.
• FY 2011 Subsidy Revenues

Subsidy revenues are currently budgeted to decrease by $4,445,000 or -3.7 percent. As indicated within Attachment 3A, this fiscal year utilizes no carry-forward nor reserve revenue, except the reserve revenues for San Diego and Arizona Eastern Railway Company and Taxicab Administration, as they are self-funded operations.

• FY 2011 Expenses

Please refer to Attachment 3B for functional related fiscal year 2011 budgeted expenses.

• FY 2011 Combined Expenses

Fiscal year 2011 combined expenses total $219,326,000, which is a decrease from midyear-amended Fiscal Year 2010 of $11,526,000 (-5.0%). This decrease includes reductions in pension expense, debt service costs and energy costs as indicated above.

Five-Year Forecast

Attachment 3C provides a look at MTS operations through FY 15. Passenger revenues are projected to increase by approximately 2% over the next four years. Early sales tax projections for FY 12 show a slight increase of approximately 1%, which impacts MTS’s TDA and TransNet subsidy revenue. Expenses are projected to increase by approximately 2.5% over the following four fiscal years primarily due to expected inflationary adjustments of operating expenses and energy costs.

The MTS FY 11 operating budget closing strategy includes the utilization of one-time funds, including $5 million in TDA capital funds and $3.2 million in CNG credits that previously have been used in the capital budget. Since these one-time funds are removed beginning in FY 12, our projected deficits range from $11 million in FY 12 to $15.6 million in FY 15.

Summary

Despite the significant challenge of a continuing funding shortfall in TDA and TransNet over the past three fiscal years, MTS has balanced the operating budget for fiscal year 2011.

Attachments: 3A. MTS Operating Budget – Revenue Summary
            3B. MTS Operating Budget – Consolidated Income Statement
            3C. MTS Operating Budget – Five-Year Financial Projection
## SAN DIEGO METROPOLITAN TRANSIT SYSTEM
### OPERATING BUDGET
#### REVENUE SUMMARY
#### FISCAL YEAR 2011

<table>
<thead>
<tr>
<th></th>
<th>BUDGET FY10</th>
<th>PROJECTED FY10</th>
<th>BUDGET FY11</th>
<th>DOLLAR CHANGE BUDGET/PROJECTED</th>
<th>% CHANGE BUDGET/PROJECTED</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OPERATING REVENUE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passenger Revenue</td>
<td>93,680,214</td>
<td>85,910,826</td>
<td>88,752,066</td>
<td>2,841,240</td>
<td>3.3%</td>
</tr>
<tr>
<td>Advertising Revenue</td>
<td>1,274,432</td>
<td>729,744</td>
<td>1,359,800</td>
<td>630,056</td>
<td>86.3%</td>
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<td>Contract Service Revenue</td>
<td>29,400</td>
<td>30,000</td>
<td>30,000</td>
<td>0</td>
<td>-</td>
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<tr>
<td>Other Income</td>
<td>5,719,548</td>
<td>5,125,387</td>
<td>4,269,247</td>
<td>(856,140)</td>
<td>-16.7%</td>
</tr>
<tr>
<td><strong>Total Operating Revenue</strong></td>
<td>100,703,594</td>
<td>91,795,957</td>
<td>94,411,114</td>
<td>2,615,157</td>
<td>2.8%</td>
</tr>
<tr>
<td><strong>SUBSIDY REVENUE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Revenue</td>
<td>38,224,175</td>
<td>44,533,668</td>
<td>38,624,305</td>
<td>(5,909,362)</td>
<td>-13.3%</td>
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<tr>
<td>Transportation Development Act (TDA)</td>
<td>51,299,413</td>
<td>53,246,444</td>
<td>53,551,399</td>
<td>304,955</td>
<td>0.6%</td>
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<tr>
<td>State Transit Assistance (STA)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-</td>
</tr>
<tr>
<td>State Revenue - Other</td>
<td>1,000,000</td>
<td>1,000,000</td>
<td>1,600,000</td>
<td>600,000</td>
<td>60.0%</td>
</tr>
<tr>
<td>TransNet</td>
<td>22,768,984</td>
<td>18,551,047</td>
<td>19,014,315</td>
<td>463,268</td>
<td>2.5%</td>
</tr>
<tr>
<td>Other Local Subsidies</td>
<td>1,633,578</td>
<td>4,356,491</td>
<td>4,452,306</td>
<td>95,816</td>
<td>2.2%</td>
</tr>
<tr>
<td><strong>Total Subsidy Revenue</strong></td>
<td>114,926,150</td>
<td>121,687,650</td>
<td>117,242,326</td>
<td>(4,445,324)</td>
<td>-3.7%</td>
</tr>
<tr>
<td><strong>OTHER REVENUE</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Funds</td>
<td>7,584,715</td>
<td>7,584,715</td>
<td>7,580,764</td>
<td>(3,951)</td>
<td>-0.1%</td>
</tr>
<tr>
<td>Reserves Revenue</td>
<td>1,891,928</td>
<td>9,783,867</td>
<td>92,217</td>
<td>(9,691,650)</td>
<td>-99.1%</td>
</tr>
<tr>
<td><strong>Total Other Revenues</strong></td>
<td>9,476,643</td>
<td>17,368,582</td>
<td>7,672,981</td>
<td>(9,695,601)</td>
<td>-55.8%</td>
</tr>
<tr>
<td><strong>GRAND TOTAL REVENUES</strong></td>
<td>225,106,386</td>
<td>230,852,189</td>
<td>219,326,421</td>
<td>(11,525,768)</td>
<td>-5.0%</td>
</tr>
</tbody>
</table>
## SAN DIEGO METROPOLITAN TRANSIT SYSTEM

**OPERATING BUDGET - CONSOLIDATED**

**FISCAL YEAR 2011**

<table>
<thead>
<tr>
<th></th>
<th>ORIGINAL BUDGET FY10</th>
<th>AMENDED BUDGET FY10</th>
<th>ORIGINAL BUDGET FY11</th>
<th>$ VARIANCE FY11 BUDGET TO FY10 AMENDED</th>
<th>% VARIANCE FY11 BUDGET TO FY10 AMENDED</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PASSENGER REVENUE</strong></td>
<td>93,680</td>
<td>85,911</td>
<td>88,752</td>
<td>2,841</td>
<td>3.3%</td>
</tr>
<tr>
<td><strong>OTHER REVENUE</strong></td>
<td>7,023</td>
<td>5,885</td>
<td>5,659</td>
<td>(226)</td>
<td>-3.8%</td>
</tr>
<tr>
<td><strong>TOTAL OPERATING REVENUES</strong></td>
<td>100,704</td>
<td>91,796</td>
<td>94,411</td>
<td>2,615</td>
<td>2.8%</td>
</tr>
<tr>
<td><strong>TOTAL NON-OPERATING REVENUE</strong></td>
<td>124,403</td>
<td>139,056</td>
<td>124,915</td>
<td>(14,141)</td>
<td>-10.2%</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td>225,106</td>
<td>230,852</td>
<td>219,326</td>
<td>(11,526)</td>
<td>-5.0%</td>
</tr>
<tr>
<td><strong>PERSONNEL EXPENSES</strong></td>
<td>101,263</td>
<td>107,479</td>
<td>104,608</td>
<td>(2,871)</td>
<td>-2.7%</td>
</tr>
<tr>
<td><strong>OUTSIDE SERVICES</strong></td>
<td>15,777</td>
<td>16,484</td>
<td>16,332</td>
<td>(151)</td>
<td>-0.9%</td>
</tr>
<tr>
<td><strong>PURCHASED TRANSPORTATION</strong></td>
<td>56,076</td>
<td>53,112</td>
<td>52,522</td>
<td>(590)</td>
<td>-1.1%</td>
</tr>
<tr>
<td><strong>MATERIALS AND SUPPLIES</strong></td>
<td>6,990</td>
<td>6,980</td>
<td>7,002</td>
<td>22</td>
<td>0.3%</td>
</tr>
<tr>
<td><strong>ENERGY</strong></td>
<td>26,971</td>
<td>25,303</td>
<td>21,616</td>
<td>(3,687)</td>
<td>-14.6%</td>
</tr>
<tr>
<td><strong>RISK MANAGEMENT</strong></td>
<td>4,033</td>
<td>4,236</td>
<td>4,142</td>
<td>(94)</td>
<td>-2.2%</td>
</tr>
<tr>
<td><strong>GENERAL AND ADMINISTRATIVE</strong></td>
<td>1,241</td>
<td>1,328</td>
<td>1,308</td>
<td>(21)</td>
<td>-1.5%</td>
</tr>
<tr>
<td><strong>VEHICLE / FACILITY LEASE</strong></td>
<td>624</td>
<td>613</td>
<td>634</td>
<td>21</td>
<td>3.4%</td>
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<tr>
<td><strong>DEBT SERVICE</strong></td>
<td>12,131</td>
<td>15,318</td>
<td>11,161</td>
<td>(4,156)</td>
<td>-27.1%</td>
</tr>
<tr>
<td><strong>TOTAL OPERATING EXPENSES</strong></td>
<td>225,106</td>
<td>230,852</td>
<td>219,326</td>
<td>(11,526)</td>
<td>-5.0%</td>
</tr>
<tr>
<td><strong>OVERHEAD ALLOCATION</strong></td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>TOTAL REVENUES LESS TOTAL EXPENSE</strong></td>
<td>0</td>
<td>(0)</td>
<td>(0)</td>
<td>(0)</td>
<td>-</td>
</tr>
<tr>
<td><strong>NET OPERATING SUBSIDY</strong></td>
<td>(124,403)</td>
<td>(139,056)</td>
<td>(124,915)</td>
<td>14,141</td>
<td>10.2%</td>
</tr>
<tr>
<td></td>
<td>APPROVED BUDGET FY10</td>
<td>AMENDED BUDGET FY10</td>
<td>PROPOSED BUDGET FY11</td>
<td>PROJECTED FY12</td>
<td>PROJECTED FY13</td>
</tr>
<tr>
<td>-------------------------</td>
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<td>----------------------</td>
<td>----------------</td>
<td>----------------</td>
</tr>
<tr>
<td>TOTAL OPERATING REVENUES</td>
<td>100,703,594</td>
<td>91,795,957</td>
<td>94,411,114</td>
<td>96,111,000</td>
<td>97,972,000</td>
</tr>
<tr>
<td>RECURRING SUBSIDY FUNDING</td>
<td>114,926,150</td>
<td>121,687,650</td>
<td>117,242,326</td>
<td>109,776,300</td>
<td>111,152,300</td>
</tr>
<tr>
<td>TOTAL RECURRING REVENUES</td>
<td>215,629,743</td>
<td>213,483,607</td>
<td>211,653,440</td>
<td>205,887,300</td>
<td>209,124,300</td>
</tr>
<tr>
<td>BASE COMBINED OPERATOR TRANSP. SERVICES</td>
<td>191,450,125</td>
<td>197,397,278</td>
<td>185,574,088</td>
<td>190,213,000</td>
<td>194,968,000</td>
</tr>
<tr>
<td>ADMINISTRATIVE EXPENSES</td>
<td>25,132,618</td>
<td>24,769,474</td>
<td>25,186,472</td>
<td>25,816,000</td>
<td>26,461,000</td>
</tr>
<tr>
<td>OTHER ACTIVITIES</td>
<td>938,928</td>
<td>1,100,723</td>
<td>985,098</td>
<td>1,010,000</td>
<td>1,035,000</td>
</tr>
<tr>
<td>TOTAL RECURRING OPERATING EXPENSES</td>
<td>217,521,671</td>
<td>223,267,474</td>
<td>211,745,657</td>
<td>217,039,000</td>
<td>222,464,000</td>
</tr>
<tr>
<td>ANNUAL RECURRING EXCESS (DEFICIT) OF REVENUE OVER EXPENSES</td>
<td>(1,891,928)</td>
<td>(9,783,867)</td>
<td>(92,218)</td>
<td>(11,151,700)</td>
<td>(13,339,700)</td>
</tr>
<tr>
<td>NON RECURRING REVENUES</td>
<td>1,891,928</td>
<td>9,783,867</td>
<td>92,217</td>
<td>160,000</td>
<td>160,000</td>
</tr>
<tr>
<td>NET DEBT SERVICE/LEASE REVENUE/(EXPENSE)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>ANNUAL EXCESS (DEFICIT) OF REVENUES OVER EXPENSES</td>
<td>(0)</td>
<td>0</td>
<td>(0)</td>
<td>(10,991,700)</td>
<td>(13,179,700)</td>
</tr>
</tbody>
</table>
SANDAG TRANSPORTATION COMMITTEE MEETING

June 18, 2010

Subject:

NCTD OPERATING BUDGET

RECOMMENDATION:

That the SANDAG Transportation Committee receives a copy of the NCTD FY 2011 Operating Budget.

Budget Impact

None.

DISCUSSION:

NCTD BUDGET REVIEW

This budget has been developed by NCTD’s Board at its March and April meetings and was reviewed in detail at the May 20, 2010 Board meeting. The budget information included in this agenda item should be considered preliminary; however, we do not anticipate any material changes. A public hearing and final budget approval by the NCTD Board of Directors is scheduled for June 17, 2010.

FY 2010 Operational Highlights

California’s economy continues to lag behind the rest of the country, exerting a deleterious impact on NCTD’s funding sources. The April unemployment rate for the state was 12.6% compared to the national average of 9.9%. San Diego County’s unemployment rate dipped in April but remained at the historically high level of 10.4%. Job losses continue to impact local sales tax receipts as consumers curtail spending. NCTD’s funding from TDA and TransNet for the current FY 2010 is $17 million less than had been projected in February 2007, a reduction of 33%.

STA funding diverted from NCTD to California’s general fund over the past 6 years has accumulated to over $30 million, with no funding received in FY 2010.

Ridership has also suffered due to local job losses. Passenger fare revenues for the current year are projected to be 5.7% less than last year.

Despite the economic slowdown caused by the Great Recession, NCTD has made significant strides to improve the transit experience for its customers. NCTD launched Google Transit™, a trip planning service which links NCTD service schedules with Google Maps. The Sorrento...
Valley Coaster Connection fare was suspended, reducing commute costs for COASTER customers. NCTD also hosted a series of focus groups and held several Mobility Plan Workshops to obtain feedback from customers, and to help identify the system’s strengths, challenges and opportunities.

New marketing initiatives to promote ridership were introduced during the year. A “Free Rides to College” campaign at the beginning of the semester introduced new students, faculty and staff to the SPRINTER and BREEZE service. The 15th anniversary of COASTER service was celebrated with special two-for-one fares and a progressive event which included entertainment and merchant discounts along the COASTER line. Other special two-for-one fare promotions for BREEZE, SPRINTER and COASTER were offered throughout the spring.

NCTD applied for and received $2 million in additional federal stimulus funding to support its sustainability plan to assist in reducing energy consumption and greenhouse gas emissions. Cost cutting initiatives were identified and implemented during FY 2010. Smaller 28 foot cutaway buses were purchased to provide more cost efficient and flexible service in less dense areas.

**Budget Highlights**

**FY 2010 Financial Recap**

TDA revenues comprise over 30% of NCTD’s operating revenues. Estimates for TDA funding were revised downward twice during FY 2010. The original FY 2010 estimate of county TDA revenues of $112.7 million was revised to $100.9 million in November 2009. A second revision occurred in January 2010 to $97.1 million, a total reduction of 14% for the region. NCTD’s share of the TDA reduction was about $4.2 million.

*TransNet* revenues comprise over 12% of NCTD’s operating revenues. These estimates were also revised downward twice during FY 2010. The total amount available to the region for transit purposes, originally estimated at $37.5 million, was reduced to $33.2 million in November 2009 and $31.9 million in January 2010, a decrease of 15%. The impact to NCTD was over $1.5 million. To partially offset this decrease in *TransNet* revenues, NCTD executed a funds swap with SANDAG, exchanging $1.3 million in Federal 5307 funding for more flexible *TransNet* funding.

Non-recurring revenue sources were very important for the current fiscal year. During FY 2010, NCTD received $4.5 million in CMAQ (Congestion Mitigation & Air Quality) funding. This was the final payment of a three year funding program to provide operating support for the new SPRINTER service. NCTD also received $4.7 million in economic stimulus funding for preventive maintenance.

NCTD implemented a number of cost-cutting initiatives during FY 2010, resulting in most cost categories coming in below budget. Further, fuel costs dropped significantly during the year, with actual fuel costs over $3 million below budget. To prepare for future economic challenges, the NCTD Board adopted a reserve policy which establishes a Board Reserve fund to deal with emergency or high-priority situations, and in future years develop a Service Enhancement reserve fund to build up operating funds in anticipation of future service enhancements.
FY 2011 Overview

The local economy is not projected to recover quickly. Projections from SANDAG and the County of San Diego are that FY 2011 TDA receipts for the county will be $97.2 million, the same level as for FY 2010. SANDAG’s projection for FY 2011 TransNet revenues for the region is $32.5 million, an increase of 1.8% from the actual level for FY 2010.

The decrease in sales tax revenue-based funding has been significant for NCTD. Just two years ago, NCTD’s TDA and TransNet revenues for the FY 2009 budget were projected at $43 million, comprising 47% of NCTD’s total operating budget of $92 million. For FY 2011 the total is $34.7 million, a reduction of 19% and now representing just 42% of NCTD’s total operating budget of $81 million.

STA funding of $5.9 million is included in the operating budget. However, due to the uncertainty of this funding source, the budget also includes a full offset of the $5.9 million under the revenue category “Revenue at Risk.” If the STA funding is received, the NCTD Board will determine the appropriate allocation of funds.

Passenger fare revenue for FY 2011 is budgeted at $17.2 million, remaining essentially flat with current projections for FY 2010. No fare increases are projected for FY 2011.

Due to declining sales tax revenue and reductions in state funding, NCTD faced overwhelming budget deficits projected for the upcoming 5 years. NCTD’s Board directed staff to reshape NCTD’s business model. NCTD had to be restructured to live within existing public funding streams, while giving first priority to maintaining transit services for the public.

Numerous cost cutting initiatives have been incorporated in the FY 2011 budget. They include:

- Contracted out bus operations, resulting in a savings of $2.3 million for FY 2011. Fleet and facilities maintenance will be added to the contract in July 2011. NCTD’s projected savings will increase with each year of the contract, from $6 million to $8 million annually.
- Reduced staffing in almost all parts of the organization, reducing costs an additional $1.3 million.
- Renegotiated COASTER, SPRINTER and LIFT operating contracts for an annual savings of $1.3 million.
- Reduced other contracted services for an annual savings of $2.5 million.

At this time, NCTD’s budget does not include any net reductions in service, for FY 2011 or for future years. NCTD is currently coordinating a Mobility Plan which will recommend appropriate reallocations of resources from under-utilized to higher-performing options.

NCTD’s Board of Directors has also developed a Business Plan to serve as a companion to the FY 2011 Budget. The Business Plan is built upon several studies undertaken by the District during calendar years 2009 and 2010, in response to the economic environment and the Board’s direction to reshape the business model. Studies included reviews of service delivery, paratransit services, security, marketing, and rail capital projects. The Business Plan incorporates insights from these studies, and provides a work plan for the District to achieve its goals for the upcoming fiscal year.
A recent national survey indicated that 80% of transit agencies nationwide are planning for service reductions, fare increases, or both. It is a significant achievement that NCTD projects a balanced budget for FY 2011 that does not include either service reductions or fare increases.

FY 2011 Revenue Summary – Attachment 5A

Operating Revenue

1. **Passenger fares** - Total fare revenue is projected to remain essentially flat at the actual level for FY 2010 of $17.2 million. Overall ridership is also projected to remain essentially flat for the upcoming year. NCTD's Business Plan includes an initiative to increase ridership by 5% over the next 18 months. However, to be conservative, the budget for FY 2011 does not assume an increase in ridership.

2. **Auxiliary Revenue** – This category includes advertising, shared use, dispatch, and concession revenue. The FY 2011 budget shows a projected decrease of $392K less than the FY 2010 budget, primarily due to lower advertising revenues.

3. **Non-transportation Revenue** – This category includes lease revenue, permit and administrative fee revenues and other miscellaneous revenues. The category in total is projected to decrease $216K due to uncertainty over the extension of CNG fuel tax rebates.

Grant Revenue

4. **Federal Formula Funds** – The amount for FY 2011 is based on revenue estimates provided by SANDAG and published in the Federal Register. The May Federal Register included revised amounts for both 5307 and 5309 funding, and NCTD has included those revisions in its budget. The FY 2011 apportionment are $16.5 million for 5307 funds and $5.9 million for 5309 funds, for a total of $22.4 million, slightly higher than the FY 2010 apportionment of $22 million. NCTD also has carryover of $2.2 million, resulting in total formula funding available of $24.7 million. This revenue is used to support both capital projects and operations. NCTD is maximizing the amount available to support operations, resulting in an allocation of $18.2 million for FY 2011.

5. **Other Federal Funding** – Two federal grants provide support for NCTD’s LIFT paratransit service. The MAA (Medi-Cal Administrative Activities) reimbursement program is projected to provide $460K, and New Freedom Mobility grants are budgeted to provide $75K for mobility travel training. Other funding sources in this category include JARC (Job Access Reverse Commute) projected at $105K for FY 2011, and 5311(f) funding for rural bus routes at $339K.

6. **Transportation Development Act (TDA) 4.0 revenue** – For FY 2011, TDA 4.0 allocated to NCTD is $25.4 million, less $426K allocated to SANDAG for transferred functions, leaving $25 million for use by NCTD. For FY 2011, NCTD plans to use $828K as the local match for capital projects, leaving $24.2 million as revenue for the FY 2011 operating budget. The $24.2 million included in the FY 2011 operating budget significantly lower than the amount budgeted for FY 2010.
7. **Transportation Development Act (TDA) 4.5 revenue** – TDA 4.5 is used to support services for seniors and the disabled. NCTD's total projected funding for FY 2011 is $1.3 million, used entirely in the operating budget.

8. **State Transit Assistance (STA)** – As noted above, STA funding is included in the operating budget for $5.9 million. However, the full amount is offset in a revenue category called "Revenue at Risk" due to the unpredictable nature of the funding source.

9. **TransNet** – NCTD's allocation of TransNet for FY 2011 is $8.9 million for operations and $236K for ADA services. NCTD was also awarded a TransNet senior mini grant for $39K for mobility services. Total Transnet funding for FY 2011 is $9.2 million.

**Other Revenue**

10. Other revenue includes investment income and gains/losses on the disposal of fixed assets, both projected to be slightly higher than the amount budgeted for FY 2010.

**Non-Recurring Revenue**

11. In FY 2010, NCTD received $4.5 million in CMAQ (Congestion Mitigation & Air Quality) funding. This is the final payment of a three year funding program to support operations of the new SPRINTER service. (During FY 2010, NCTD also received one-time funds of $4.7 million in economic stimulus funding to support operations.) For FY 2011, we project only $250K from economic stimulus funding for operations.

**FY 2011 Total Operating Budget and Expense Summary – Attachment 5B**

1. **Salaries and Wages** - Salaries and wages for FY 2011 are projected to be $13.4 million or 58% below the FY 2010 budget. This dramatic decrease is due to contracting out bus operations, and reducing staffing in almost all parts of the organization.

2. **Employee Benefits** – Benefits are projected to be $7.3 million or 56% lower than the budgeted levels for FY 2010, in line with the dramatic decrease in Salaries and Wages noted above.

3. **Professional Services/Reimbursements** – These costs are expected to be about $1.2 million less than the amount budgeted for FY 2010.

4. **Fuel and Taxes** – This category includes gasoline, diesel fuel, CNG, lubricants, and related fuel taxes. This category is projected to decrease about $893K from the budgeted level for FY 2010. The FY 2011 budget for diesel and gasoline is currently set at $3.00/gallon before taxes (the last three-month average is $2.25/gallon). NCTD’s total projected diesel consumption for FY 2011 is 1.6 million gallons; total projected annual CNG consumption is 1.5 million therms.

5. **Materials and Supplies** – This category includes office supplies, advertising, and printed media for NCTD. It is projected to decrease $2.1 million compared to the budgeted levels for FY 2010. This reduction is because the category included bus spare
parts and supplies in FY 2010; in FY 2011, these costs are part of the bus operations contract in Purchased Transportation.

6. **Utilities** – Utilities are projected to about the same as for the FY 2010 budget.

7. **Casualty and Liability** – This category is projected to be about $819K lower than for the FY 2010 budget.

8. **Purchased Transportation** – This category shows an increase of $18 million due to the bus operations contract effective for FY 2011. The FY 2011 budgeted amount for BREEZE purchased transportation is about $19.6 million. COASTER, SPRINTER and LIFT purchased transportation costs are lower for FY 2011 due to cost cutting initiatives and contract renegotiations.

9. **Advertising and Misc.** – This category shows an increase for FY 2011 of $60 K over the budgeted level for FY 2010. NCTD plans to continue to increase its marketing efforts in FY 2011.

10. **Leases and rentals** – This category shows a small decrease of $26K from budgeted FY 2010 levels.

11. **Workers’ Compensation** – This category shows no increase from budgeted levels for FY 2010.

12. **Debt Service** – This category is $257K lower than the budgeted levels for FY 2010.

13. **Contingency** – This new expense category for FY 2011 was included due to the overall uncertainty of the economic environment.

**Expense Summary by Transportation Mode—Attachment 5C**

Attachment 5C shows NCTD’s projected FY 2011 expenses by its four transit service modes (BREEZE, LIFT, COASTER, and SPRINTER) and its two railroad maintenance modes (Coastal and Inland).

BREEZE – Contracting for bus operations in FY 2011 and other cost cutting initiatives result in a $4.9 million cost savings for BREEZE bus service compared to the budget for FY 2010.

LIFT – LIFT is NCTD’s ADA/Paratransit service. Budgeted costs are projected to decrease $286K for FY 2011 due to a renegotiated contract with the service contractor.

COASTER – A renegotiated contract with the service contractor and other cost cutting initiatives are projected to reduce budgeted COASTER service costs by $606K for FY 2011.

Coastal Railroad – This mode represents the costs required to maintain the 41 miles of coastal railway. Budgeted costs are projected to increase by $561K for FY 2011 due in part to budgeted costs related to real estate consulting services and compliance costs related to bridge management regulations issued by the Federal Railroad Administration (FRA).
SPRINTER – Similar to the COASTER above, budgeted SPRINTER service costs are projected to decrease over $2 million for FY 2011 due to a renegotiated contract with the service contractor and other cost cutting initiatives.

Inland Railroad – This mode represents the costs required to maintain the 22 miles of track on the east-west line between Oceanside and Escondido. Costs are projected to increase $240K, due in part to budgeted costs related to real estate consulting services.

Five Year Projections – Attachment 5D and 5E

Attachment 5D and Attachment 5E show projections for NCTD’s operating budget through fiscal year 2015. Attachment 5D uses SANDAG’s estimates for projected increases in TDA and TransNet funding. Attachment 5E is used by the NCTD Board as a “stress test” of the five-year projections, using a more conservative estimate of TDA and TransNet funding for illustrative purposes.

Based on SANDAG’s estimates for growth in TDA and TransNet funding, NCTD’s operating budget is balanced for FY 2011, and shows increasing surpluses to be added to reserves for FY 2012 through FY 2015.

To “stress-test” these projections, the NCTD Board also reviewed a scenario using more conservative estimates for TDA and TransNet funding. Based on these projections, NCTD would show deficits of over $1 million in FY 2014 and FY 2015. However, deficits of this magnitude would be much easier to deal with compared to the devastating level of projected deficits of a year ago, in which NCTD faced the prospect of annual deficits exceeding $20 million in the out years.

Both sets of five-year projections include STA funding of $3.5 million annually for FY 2012 through FY 2015. Should state funding fail to appear, NCTD will change its plans accordingly.
NORTH COUNTY TRANSIT DISTRICT
OPERATING BUDGET
REVENUE SUMMARY
FY 2011 BUDGET

<table>
<thead>
<tr>
<th></th>
<th>BUDGET FY 2010</th>
<th>BUDGET FY 2011</th>
<th>FY11 Budget to FY10 Budget</th>
<th>% Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPERATING REVENUE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passenger Fares</td>
<td>$18,972,669</td>
<td>$17,170,328</td>
<td>$(1,802,341)</td>
<td>(9.5%)</td>
</tr>
<tr>
<td>Auxiliary Revenue</td>
<td>8,307,000</td>
<td>7,915,020</td>
<td>$(391,980)</td>
<td>(4.7%)</td>
</tr>
<tr>
<td>Non-transportation Revenue</td>
<td>1,701,633</td>
<td>1,485,984</td>
<td>$(215,649)</td>
<td>(12.7%)</td>
</tr>
<tr>
<td><strong>Total Operating Revenues</strong></td>
<td><strong>$28,981,302</strong></td>
<td><strong>$26,571,332</strong></td>
<td><strong>$(2,409,970)</strong></td>
<td><strong>(8.3%)</strong></td>
</tr>
</tbody>
</table>

| GRANT REVENUE        |                |                |                            |            |
| Federal Formula Funds - 5307/5309 | $13,645,000 | $18,211,044 | $4,566,044 | 33.5% |
| Other Federal Funding | 1,216,016 | 978,597       | $(237,419)               | (19.5%)    |
| Transportation Development Act - 4.0 | 26,836,318 | 24,169,764 | $(2,666,554) | (9.9%)    |
| Transportation Development Act - 4.5 | 1,512,034 | 1,311,994 | $(200,040) | (13.2%)   |
| State Transit Assistance - STA | - | 5,900,000 | $5,900,000 | N/A |
| Less: Revenue at Risk | - | (5,900,000) | $(5,900,000) | N/A |
| Other State Grants    | 27,000         | -              | $(27,000)                 | N/A        |
| TransNet              | 10,639,242     | 9,191,604      | $(1,447,638)              | (13.6%)    |
| **Total Grant Revenues** | **$53,875,810** | **$53,863,003** | **$(12,807)**          | **(0.0%)** |

| OTHER REVENUE        | $50,000        | $117,000       | $67,000                    | 134.0%     |

| NON-RECURRING REVENUE| $4,963,000     | $250,000       | $(4,713,000)               | (95.0%)    |

**TOTAL REVENUES**  $87,869,912  $80,801,335  $(7,068,577)  (8.0%)
## NORTH COUNTY TRANSIT DISTRICT
### TOTAL OPERATING BUDGET AND EXPENSE SUMMARY
#### FY 2011 BUDGET

<table>
<thead>
<tr>
<th></th>
<th>BUDGET FY 2010</th>
<th>BUDGET FY 2011</th>
<th>$ Variance FY11 Budget to FY10 Budget</th>
<th>% Variance FY11 Budget to FY10 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Passenger Fare Revenue</td>
<td>$18,972,669</td>
<td>$17,170,328</td>
<td>$(1,802,341)</td>
<td>(9.5%)</td>
</tr>
<tr>
<td>Other Revenue</td>
<td>10,008,633</td>
<td>9,401,004</td>
<td>$(607,629)</td>
<td>(6.1%)</td>
</tr>
<tr>
<td><strong>TOTAL OPERATING REVENUES</strong></td>
<td><strong>$28,981,302</strong></td>
<td><strong>$26,571,332</strong></td>
<td><strong>$(2,409,970)</strong></td>
<td><strong>(8.3%)</strong></td>
</tr>
<tr>
<td><strong>TOTAL NON-OPERATING REVENUE</strong></td>
<td><strong>58,888,610</strong></td>
<td><strong>54,230,003</strong></td>
<td><strong>(4,658,607)</strong></td>
<td><strong>(7.9%)</strong></td>
</tr>
<tr>
<td><strong>TOTAL REVENUES</strong></td>
<td><strong>$87,869,912</strong></td>
<td><strong>$80,801,335</strong></td>
<td><strong>$(7,068,577)</strong></td>
<td><strong>(8.0%)</strong></td>
</tr>
</tbody>
</table>

### EXPENSES

<table>
<thead>
<tr>
<th>Expense Description</th>
<th>BUDGET FY 2010</th>
<th>BUDGET FY 2011</th>
<th>$ Variance FY11 Budget to FY10 Budget</th>
<th>% Variance FY11 Budget to FY10 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries and Wages</td>
<td>$23,034,509</td>
<td>9,645,911</td>
<td>$13,388,598</td>
<td>58.1%</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>13,233,047</td>
<td>5,887,241</td>
<td>7,345,806</td>
<td>55.5%</td>
</tr>
<tr>
<td>Professional Services/Reimbursements</td>
<td>15,029,960</td>
<td>13,825,217</td>
<td>1,204,743</td>
<td>8.0%</td>
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<tr>
<td>Fuel and Taxes</td>
<td>8,974,739</td>
<td>8,082,080</td>
<td>892,659</td>
<td>9.9%</td>
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<tr>
<td>Materials and Supplies</td>
<td>2,942,622</td>
<td>843,429</td>
<td>2,099,193</td>
<td>71.3%</td>
</tr>
<tr>
<td>Utilities</td>
<td>1,911,451</td>
<td>1,904,397</td>
<td>7,054</td>
<td>0.4%</td>
</tr>
<tr>
<td>Casualty and Liability</td>
<td>3,784,806</td>
<td>2,965,421</td>
<td>819,385</td>
<td>21.6%</td>
</tr>
<tr>
<td>Purchased Transportation*</td>
<td>15,131,760</td>
<td>33,156,029</td>
<td>$(18,024,269)</td>
<td>(119.1%)</td>
</tr>
<tr>
<td>Advertising and Misc.</td>
<td>555,938</td>
<td>616,185</td>
<td>(60,247)</td>
<td>(10.8%)</td>
</tr>
<tr>
<td>Leases and Rentals</td>
<td>526,080</td>
<td>499,900</td>
<td>26,180</td>
<td>5.0%</td>
</tr>
<tr>
<td>Workers' Compensation</td>
<td>1,100,000</td>
<td>1,100,000</td>
<td>0</td>
<td>0.0%</td>
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<tr>
<td>Debt Service</td>
<td>1,645,000</td>
<td>1,387,600</td>
<td>257,400</td>
<td>15.6%</td>
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<tr>
<td>Contingency</td>
<td>-</td>
<td>887,925</td>
<td>887,925</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>TOTAL OPERATING EXPENSES</strong></td>
<td><strong>$87,869,912</strong></td>
<td><strong>$80,801,335</strong></td>
<td><strong>$7,068,577</strong></td>
<td><strong>8.0%</strong></td>
</tr>
</tbody>
</table>

### NET ADDITION (REDUCTION) TO RESERVES

|                      | $0             | $0             |

* Reflects impact of First Transit contract
## NORTH COUNTY TRANSIT DISTRICT
### EXPENSE SUMMARY BY TRANSPORTATION MODE
#### FY 2011 BUDGET

( ) indicates unfavorable variance

<table>
<thead>
<tr>
<th></th>
<th>BUDGET FY 2010</th>
<th>BUDGET FY 2011</th>
<th>$ Variance FY11 Budget to FY10 Budget</th>
<th>% Variance FY11 Budget to FY10 Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EXPENSES</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BREEZE</td>
<td>$ 44,114,737</td>
<td>$ 39,198,362</td>
<td>$ 4,916,375</td>
<td>11.1%</td>
</tr>
<tr>
<td>LIFT</td>
<td>4,404,819</td>
<td>4,118,303</td>
<td>286,516</td>
<td>6.5%</td>
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<tr>
<td>COASTER</td>
<td>17,792,503</td>
<td>17,186,695</td>
<td>605,808</td>
<td>3.4%</td>
</tr>
<tr>
<td>Coastal Railroad</td>
<td>2,703,433</td>
<td>3,264,670</td>
<td>(561,237)</td>
<td>(20.3%)</td>
</tr>
<tr>
<td>SPRINTED</td>
<td>17,850,542</td>
<td>15,788,437</td>
<td>2,062,105</td>
<td>11.6%</td>
</tr>
<tr>
<td>Inland Railroad</td>
<td>1,003,878</td>
<td>1,244,868</td>
<td>(240,990)</td>
<td>(24.0%)</td>
</tr>
<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td><strong>$ 87,869,912</strong></td>
<td><strong>$ 80,801,335</strong></td>
<td><strong>$ 7,068,577</strong></td>
<td><strong>8.0%</strong></td>
</tr>
</tbody>
</table>
### NORTH COUNTY TRANSIT DISTRICT
### OPERATING BUDGET
### FIVE YEAR PROJECTIONS based on SANDAG estimates*
### FY 2011 BUDGET

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Passenger fares</td>
<td>17,170,328</td>
<td>17,421,334</td>
<td>17,876,372</td>
<td>18,344,165</td>
<td>18,825,095</td>
</tr>
<tr>
<td>Auxiliary revenues</td>
<td>7,915,020</td>
<td>8,112,896</td>
<td>8,315,718</td>
<td>8,523,611</td>
<td>8,736,701</td>
</tr>
<tr>
<td>Non-transportation revenues</td>
<td>1,485,984</td>
<td>1,585,044</td>
<td>1,617,745</td>
<td>1,651,099</td>
<td>1,685,121</td>
</tr>
<tr>
<td>Operating Revenue</td>
<td>26,571,332</td>
<td>27,119,274</td>
<td>27,809,835</td>
<td>28,518,875</td>
<td>29,246,917</td>
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<tr>
<td>Recurring Non-Operating Revenue</td>
<td>117,000</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
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<tr>
<td>Recurring Grant Revenue</td>
<td>53,863,003</td>
<td>54,724,527</td>
<td>57,218,303</td>
<td>60,808,968</td>
<td>64,301,567</td>
</tr>
<tr>
<td><strong>TOTAL RECURRING REVENUES</strong></td>
<td>80,551,335</td>
<td>81,893,801</td>
<td>85,078,138</td>
<td>89,377,843</td>
<td>93,598,484</td>
</tr>
<tr>
<td><strong>TOTAL RECURRING OPERATING EXPENSES</strong></td>
<td>80,801,335</td>
<td>79,927,028</td>
<td>81,561,689</td>
<td>84,282,452</td>
<td>86,371,330</td>
</tr>
</tbody>
</table>

**ANNUAL RECURRING EXCESS (DEFICIT) OF REVENUE OVER EXPENSES**

| (250,000) | 1,966,773 | 3,516,449 | 5,095,391 | 7,227,154 |

**NON RECURRING REVENUES**

| 250,000 | - | - | - | - |

**ANNUAL OPERATING SURPLUS (DEFICIT)**

| - | 1,966,773 | 3,516,449 | 5,095,391 | 7,227,154 |

Debt Service - Principal payments

| - | 1,100,000 | 1,125,000 | 1,200,000 | 1,225,000 |

**NET ADDITION (REDUCTION) TO RESERVES**

| - | 866,773 | 2,391,449 | 3,895,391 | 6,002,154 |

*Based on the following projected increases in TDA and TransNet funding:

- 4.9%
- 5.3%
- 8.1%
- 6.7%
## NORTH COUNTY TRANSIT DISTRICT
### OPERATING BUDGET
#### FIVE YEAR PROJECTIONS based on more conservative estimates*

<table>
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</thead>
<tbody>
<tr>
<td><strong>REVENUE:</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Passenger fares</td>
<td>17,170,328</td>
<td>17,421,334</td>
<td>17,876,372</td>
<td>18,344,165</td>
<td>18,825,095</td>
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<td>Auxiliary revenues</td>
<td>7,915,020</td>
<td>8,112,896</td>
<td>8,315,718</td>
<td>8,523,611</td>
<td>8,736,701</td>
</tr>
<tr>
<td>Non-transportation revenues</td>
<td>1,485,984</td>
<td>1,585,044</td>
<td>1,617,745</td>
<td>1,651,099</td>
<td>1,685,121</td>
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<td><strong>Operating Revenue</strong></td>
<td><strong>26,571,332</strong></td>
<td><strong>27,119,274</strong></td>
<td><strong>27,809,835</strong></td>
<td><strong>28,518,875</strong></td>
<td><strong>29,246,917</strong></td>
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<td>Recurring Non-Operating Revenue</td>
<td>117,000</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
<td>50,000</td>
</tr>
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<td>Recurring Grant Revenue</td>
<td>53,863,003</td>
<td>53,329,120</td>
<td>54,208,462</td>
<td>55,341,430</td>
<td>57,096,212</td>
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<td><strong>TOTAL RECURRING REVENUES</strong></td>
<td>80,551,335</td>
<td>80,498,394</td>
<td>82,068,297</td>
<td>83,910,305</td>
<td>86,395,129</td>
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<td><strong>TOTAL RECURRING OPERATING EXPENSES</strong></td>
<td>80,801,335</td>
<td>79,927,028</td>
<td>81,561,689</td>
<td>84,282,452</td>
<td>86,371,330</td>
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<tr>
<td><strong>ANNUAL RECURRING EXCESS (DEFICIT) OF REVENUE OVER EXPENSES</strong></td>
<td>250,000</td>
<td>571,366</td>
<td>506,608</td>
<td>(372,147)</td>
<td>23,799</td>
</tr>
<tr>
<td><strong>NON RECURRING REVENUES</strong></td>
<td>250,000</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>ANNUAL OPERATING SURPLUS (DEFICIT)</strong></td>
<td>250,000</td>
<td>571,366</td>
<td>506,608</td>
<td>(372,147)</td>
<td>23,799</td>
</tr>
<tr>
<td>Debt Service - Principal payments</td>
<td>-</td>
<td>1,100,000</td>
<td>1,125,000</td>
<td>1,200,000</td>
<td>1,225,000</td>
</tr>
<tr>
<td><strong>NET ADDITION (REDUCTION) TO RESERVES</strong></td>
<td>-</td>
<td>(528,634)</td>
<td>(618,392)</td>
<td>(1,572,147)</td>
<td>(1,201,201)</td>
</tr>
</tbody>
</table>

*Based on the following projected increases in TDA and TransNet funding: 1% 1% 2% 3%*
Introduction

As part of the development of the 2050 Regional Transportation Plan (RTP), the Executive Director and Chair of the Board of Directors established the Transportation Project Evaluation Criteria Ad Hoc Working Group (TPEC). The TPEC is composed of representatives from a number of standing SANDAG working groups including the Bicycle-Pedestrian Working Group (BPWG), Cities/Counties Transportation Advisory Committee (CTAC), Regional Planning Stakeholders Working Group (SWG), Regional Planning Technical Working Group (TWG), and Tribal Transportation Technical Working Group. Partner agency representatives include Caltrans, Metropolitan Transit System (MTS), North County Transit District (NCTD), Port of San Diego, and San Diego County Regional Airport Authority (SDCRAA). The TPEC’s responsibilities are to provide input on transportation project evaluation criteria and plan performance measures, which will support the goals and objectives for the 2050 RTP.

The Board of Directors is scheduled to approve the transportation project evaluation criteria at its June 11, 2010, meeting. The evaluation criteria will be used to evaluate individual highway corridors, transit services, connector and freight projects, and to develop lists of ranked projects for each category. These ranked project lists, in turn, will be used to develop revenue-constrained multimodal transportation network scenarios. The network scenarios will be evaluated using plan performance measures.

Discussion

The TPEC met twice in March and April to provide input on the draft plan performance measures. In addition, SANDAG staff has made presentations to SANDAG working groups including the BPWG, CTAC, San Diego Regional Traffic Engineers Council (SANTEC), Southern California Tribal Chairmen’s Association, SWG, and TWG, as well as the TransNet Independent Taxpayer Oversight Committee (ITOC).

Staff presented the 2050 RTP draft plan performance measures to the Transportation Committee for discussion at its May 21, 2010, meeting. Staff has incorporated two additional transit reliability performance measures to address comments provided by the Committee at that meeting (percent of total transit travel in congested conditions for peak periods and all day).

Recommendation

The Transportation Committee is asked to recommend that the Board of Directors approve the 2050 Regional Transportation Plan performance measures in substantially the same form as attached to this report.
Plan Performance Measures - Process

The Board of Directors established six policy goals for the 2050 RTP. These goals are structured into two overarching themes: Quality of Travel & Livability, and Sustainability. Quality of Travel & Livability relates to how the transportation system functions from the individual customer perspective (System Preservation & Safety, Mobility, and Reliability). Sustainability relates to making progress simultaneously in each of the Three “Es” (Prosperous Economy, Healthy Environment, and Social Equity) from a regional perspective. The draft plan performance measures are grouped within each of the six policy goals for the 2050 RTP.

At the September 11, 2009, Board of Directors Policy meeting, the Board participated in an interactive polling process to provide input for the 2050 RTP: Vision and Goals. During this process, the Board was asked to rank the draft goals. The three top-ranked goals were System Preservation & Safety, Mobility, and Prosperous Economy.

Upon the review of the ranked goals, the Board discussed the outcomes highlighting the interconnectedness of the issues related to achieving the goals. On December 4, 2009, the Board of Directors held another Policy meeting to discuss the revised 2050 RTP goals and policy objectives. At this meeting the Board reiterated that all six goals were important. The Board also discussed policy objectives to help reach these goals. At its June 11, 2010, Policy Meeting the Board will have another opportunity to discuss the 2050 RTP goals. Staff will report on any input received from the Board verbally at the Transportation Committee meeting.

The application of the RTP performance measures is two-fold. First, the plan performance measures will serve as an aid for decision makers to select a preferred transportation network alternative for the 2050 RTP revenue constrained funding scenario, among options that will be presented to the Transportation Committee and the Board of Directors. Second, plan performance measures will be used to compare the performance of the preferred transportation network alternative to other transportation network scenarios such as a current, future no build, and land use alternative and to measure how well the 2050 RTP is projected to perform.

Plan Performance Measures - Existing and New Measures

The draft plan performance measures are included in Attachment 1 and the draft methodology to estimate performance measures is included in Attachment 2. Revisions have been made to the current 2030 RTP performance measures to incorporate new data sources, technical tools, and analysis, and to coordinate and maintain consistency with other SANDAG plans and/or programs, and partner agencies.

Several new plan performance measures are proposed to address policy objectives discussed by the Board of Directors and input from stakeholders. These include:

- Annual projected number of bicycle/pedestrian injury/fatal collisions per capita
- Percent of transportation investments towards maintenance and rehabilitation, and towards operational improvements
- Number of interregional transit routes by service type
• Network enhancements by freight mode
• Net benefits, return on investment, and economic impacts (note that the methodology to estimate these performance measures is still to be developed)
• Percent of Vehicle Miles Traveled (VMT) by travel speed (by mode)
• Percent of total transit travel in congested conditions (peak period and all day)
• Non work trip mode share (peak period and all day) including bike/walk
• Total bike and walk trips
• CO2 emissions per capita
• Comparison of Outcomes for Environmental Justice (EJ) and Non-EJ Communities for access to schools and the San Diego International Airport (within 30 minutes), and to healthcare, and parks and beaches (within 15 minutes).
• Distribution of RTP expenditures per capita (EJ and non-EJ populations)

The draft plan performance measures have incorporated indicators from the Urban Area Transit Strategy (UATS), and initial economic analysis work efforts.

The draft plan performance measures also have incorporated additional environmental justice indicators in response to the Joint Certification Review of the Metropolitan San Diego Area Transportation Planning Process Report prepared by the Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) in 2008. The report recommended that “the next RTP update by SANDAG include appropriate measures and analysis of the burdens of regional transportation system investments and strategies for different socio-economic groups.” These new proposed performance measures were developed in the environmental justice work effort underway through the Regional Planning SWG.

Next Steps

Pending the recommendation from the Transportation Committee, the 2050 RTP plan performance measures will be presented to the Board of Directors for discussion at its June 25, 2010, meeting.

CHARLES “MUGGS” STOLL
Director of Land Use and Transportation Planning

Attachments: 1. Draft 2050 Regional Transportation Plan (RTP) Plan Performance Measures
               2. Draft Methodology to Estimate Performance Measures

Key Staff Contact: Scott Strelecki, (619) 699-6954, sstr@sandag.org
<table>
<thead>
<tr>
<th>QUALITY OF TRAVEL &amp; LIVABILITY</th>
<th>Goal</th>
<th>Policy Objectives</th>
<th>Potential Plan Performance Measure(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>System Preservation &amp; Safety</strong> - The public’s investment in transportation should be protected by maintaining the transportation system. It is critical to preserve and ensure a safe regional transportation system.</td>
<td>Keep the region’s transportation system in a good state of repair</td>
<td>Annual projected number of vehicle injury/fatal collisions per capita</td>
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<td></td>
<td>Reduce bottlenecks and increase safety by improving operations</td>
<td>Annual projected number of bicycle/pedestrian injury/fatal collisions per capita</td>
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<tr>
<td></td>
<td>Improve emergency preparedness within the regional transportation system</td>
<td>Percent of transportation investments towards maintenance and rehabilitation</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Percent of transportation investments towards operational improvements</td>
<td></td>
</tr>
<tr>
<td><strong>Mobility</strong> - The transportation system should provide for convenient travel options for people and goods and maximize its productivity. The system should reduce both the time it takes to travel as well as the total costs of travel.</td>
<td>Tailor transportation improvements to better connect people with jobs and other activities</td>
<td>Average work trip travel time (in minutes)</td>
<td></td>
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<tr>
<td></td>
<td>Provide convenient travel choices including transit, intercity and high-speed trains, driving, ridesharing, walking, and biking</td>
<td>Average work trip travel speed by mode (in m.p.h.)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Preserve and expand options for regional freight movement</td>
<td>Percent of work and higher education trips accessible in 30 minutes in peak periods by mode</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Increase the use of transit, ridesharing, walking and biking in major corridors and communities</td>
<td>Percent of non work-related trips accessible in 15 minutes by mode</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provide transportation choices to better connect the San Diego region with Mexico, neighboring counties, and tribal nations</td>
<td>Travel time (by mode) in key travel corridors/communities</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>Peak-period mode share in key travel corridors/communities</td>
<td></td>
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<td></td>
<td></td>
<td>Out-of-pocket user costs per trip</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Number of interregional transit routes by service type</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Network enhancements by freight mode</td>
<td></td>
</tr>
<tr>
<td><strong>Prosperous Economy</strong> - The transportation system should play a significant role in raising the region's standard of living.</td>
<td>Maximize the economic benefits of transportation investments</td>
<td>Net benefits (such as congestion management and enhanced mobility)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enhance the goods movement system to support economic prosperity</td>
<td>Return on investment</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Economic impacts (such as jobs, wages, value of goods and services produced in the region)</td>
<td></td>
</tr>
</tbody>
</table>

Note: Bold performance measures were used in the 2030 RTP and nonbold performance measures represent potential new measures. Performance measures that compare metrics of different modes include the following: auto, transit, carpool, unless otherwise noted.
<table>
<thead>
<tr>
<th>SUSTAINABILITY</th>
<th>Policy Objectives</th>
<th>Potential Plan Performance Measure(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reliability</strong> - The transportation system should be reliable so that travelers can expect relatively consistent travel times from day-to-day for the same trip by mode(s).</td>
<td>Employ new technologies to make travel more reliable and convenient  Manage the efficiency of the transportation system to improve traffic flow</td>
<td>Percent of total auto travel in congested conditions (peak periods)  Percent of total auto travel in congested conditions (all day)  Daily vehicle delay per capita  Daily truck hours of delay  Percent of VMT by travel speed (by mode)  Percent of total transit travel in congested conditions (peak periods)  Percent of total transit travel in congested conditions (all day)</td>
</tr>
<tr>
<td><strong>Healthy Environment</strong> - The transportation system should lead to environmental sustainability and foster efficient development patterns that optimize travel, housing, and employment choices and encourage future growth away from rural areas and closer to existing and planned development.</td>
<td>Develop transportation improvements that respect and enhance the environment  Reduce greenhouse gas emissions from vehicles and continue to improve air quality in the region  Make transportation investments that result in healthy and sustainable communities</td>
<td>Gross acres of constrained lands consumed for transit and highway infrastructure  On-road fuel consumption (all day) per capita  Smog forming pollutants (pounds/year) per capita  Systemwide VMT (all day) per capita  Transit passenger miles (all day) per capita  Percent of peak period trips within ½ mile of a transit stop  Percent of daily trips within ½ mile of a transit stop  Work trip mode share (peak periods including bike/walk)  Work trip mode share (all day including bike/walk)  Non work trip mode share (peak period including bike/walk)  Non work trip mode share (all day including bike/walk)  Total bike and walk trips  CO2 emissions per capita</td>
</tr>
<tr>
<td><strong>Social Equity</strong> - The transportation system should be designed to provide an equitable level of transportation services for all populations.</td>
<td>Create equitable transportation opportunities for all populations regardless of age, ability, race, ethnicity or income  Ensure access to jobs, services, and recreation for populations with fewer transportation choices</td>
<td>Comparison of Outcomes for Environmental Justice (EJ) and Non-EJ Communities  Average travel time per person trip (in minutes)  Percent of work trips accessible in 30 minutes by mode  Percent of homes within 1/2 mile of a transit stop  Percent of population within 30 minutes:  - schools (higher education - including vocational)  - San Diego International Airport  Percent of population within 15 minutes:  - healthcare (hospitals, community clinics)  - parks and beaches  Distribution of RTP expenditures per capita</td>
</tr>
</tbody>
</table>

Note: Bold performance measures were used in the 2030 RTP and nonbold performance measures represent potential new measures. Performance measures that compare metrics of different modes include the following: auto, transit, carpool, unless otherwise noted.
POTENTIAL METHODOLOGY TO ESTIMATE PERFORMANCE MEASURES

System Preservation & Safety-

(1) Annual projected number of vehicle injury/fatal collisions per capita = VMT by facility type (freeway, prime arterial, other) multiplied by basic average collision rate by facility type divided by total population

(2) Annual projected number of bicycle/pedestrian injury/fatal collisions per capita = bicycle/pedestrian trips multiplied by basic average collision rate divided by total population

(3) Percent of transportation investments towards maintenance and rehabilitation = sum of maintenance and rehabilitation transportation investments divided by all transportation investments

(4) Percent of transportation investments towards operational improvements = sum of operational improvement transportation investments divided by all transportation investments

Mobility-

(1) Average work trip travel time (all day) = work trip person hours of travel divided by work trips (all day by mode: auto, transit, and carpool)

(2) Average work trip travel speed by mode (in m.p.h.) = work trip vehicles miles traveled (VMT) divided by work trip person hours of travel (peak period by mode: auto, transit, and carpool)

(3) Percent of work and higher education trips accessible in 30 minutes in peak periods by mode = work and college trips within 30 minutes divided by total work and college trips (by mode: auto, transit, and carpool)

(4) Percent of non work-related trips accessible in 15 minutes by mode = non work-related trips within 15 minutes divided by total non work trips (all day) (by mode: auto, transit, and carpool)

(5) Travel time (by mode) in key travel corridors/communities = work trip person hours of travel divided by work trips (peak period by mode: auto, transit, and carpool) as applied to corridors/communities

(6) Peak period mode share in key travel corridors/communities = peak mode share (auto, transit, and carpool) as applied to corridors/communities

(7) Out-of-pocket user costs per trip = total auto and transit costs divided by total auto and transit person trips respectively

(8) Number of interregional transit routes by service type = total number of interregional transit routes multiplied by weighting factor (Rail/BRT=5, arterial rapid=3, high frequency local =2)

(9) Network enhancements by freight mode = part A: total sum of freight capacity acreage (for rail yards, port terminals, and ports of entry) and part B: total sum of freight capacity mileage (for rail mainline, highway connectors to terminals, and highway truck routes)
Prosperous Economy-

(1) Net benefits (such as congestion management and enhanced mobility) = TBD

(2) Return on investment = TBD

(3) Economic impacts (such as jobs, wages, value of goods and services produced in the region) = using economic input/output model

Reliability-

(1) Percent of total auto travel in congested conditions (peak periods) = VMT at Level of Service (LOS) E and LOS F (volume/capacity > 0.85) divided by total VMT (peak periods)

(2) Percent of total auto travel in congested conditions (all day) = VMT at Level of Service (LOS) E and LOS F (volume/capacity > 0.85) divided by total VMT (all day)

(3) Daily vehicle delay per capita = congested vehicle hours traveled (VHT) at Level of Service (LOS) E and LOS F minus free flow VHT (Volume/Capacity > 0.85) divided by population

(4) Daily truck hours of delay = modeled roadway delay time multiplied by modeled truck volume (all day)

(5) Percent of VMT by travel speed (by mode) = speed bin (by mode: auto, carpool, truck) divided by total VMT (by mode: auto, carpool, truck)

(6) Percent of total transit travel in congested conditions (peak periods) = transit VMT on facilities at Level of Service (LOS) E and LOS F (volume/capacity > 0.85) divided by total transit VMT (peak periods)

(7) Percent of total transit travel in congested conditions (all day) = transit VMT on facilities at Level of Service (LOS) E and LOS F (volume/capacity > 0.85) divided by total transit VMT (all day)

Healthy Environment-

(1) Gross acres of constrained lands consumed for transit and highway infrastructure

(2) Total fuel consumption (all day) per capita = VMT divided by on-road fleet fuel economy divided by total population

(3) Smog forming pollutants (pounds/year) per capita = daily pounds of reactive organic gases plus daily pounds of nitrogen oxides divided by total population

(4) Systemwide VMT (all day) per capita = total sum of vehicles on roadway segment (all day) multiplied by length of roadway segment divided by total population

(5) Transit passenger miles (all day) per capita = total sum of transit passengers on transit segment (all day) multiplied by length of transit segment divided by total population
(6) Percent of peak-period trips within ½ mile of a transit stop = number of peak period trip origins and destinations within ½ mile of a transit stop divided by total peak period trips

(7) Percent of daily trips within ½ mile of a transit stop = number of daily trip origins and destinations within ½ mile of a transit stop divided by total daily trips

(8) Work trip mode share (peak periods including bike/walk) = percent of work trips by mode (peak periods)

(9) Work trip mode share (all day including bike/walk) = percent of work trips by mode (all day)

(10) Non work trip mode share (peak periods including bike/walk) = percent of non work trips by mode (peak periods)

(11) Non work trip mode share (all day including bike/walk) = percent of non work trips by mode (all day)

(12) Total bike and walk trips = total number of bike and walk trips

(13) CO2 emissions per capita = daily pounds of CO2 divided by total population

**Social Equity—**

Comparison of Outcomes for Environmental Justice (EJ) and Non-EJ Communities

These measures will be estimated for the following community types: “low-income and minority” (low-income households, minority population, severe overcrowding, and poverty-100 percent), “mobility” (zero-car households, disabled, and 75+), and “community engagement” (linguistic isolation and low educational attainment).

(1) Average travel time per person trip (in minutes, EJ and non-EJ) = person hours of travel divided by person trips (by mode: auto, transit, and carpool)

(2) Percent of work trips (EJ and non-EJ) accessible in 30 minutes in peak periods by mode = work trips within 30 minutes divided by total work trips (by mode: auto, transit, and carpool)

(3) Percent of homes within ½ mile of a transit stop (EJ and non-EJ) = number of homes within ½ mile of a transit stop divided by total homes in the community

(4) Percent of population (EJ and non-EJ) that can access schools (higher education – including vocational) within 30 minutes = EJ population within 30 minutes of schools divided by total EJ population (three community types): non-EJ population within 30 minutes of schools divided by non-EJ community population (by mode: auto, transit)

(5) Percent of population (EJ and non-EJ) that can access San Diego International Airport within 30 minutes = EJ population within 30 minutes of the Airport divided by total EJ population (three community types); non-EJ population within 30 minutes of the Airport divided by non-EJ community population (by mode: auto, transit)
(6) Percent of population (EJ and non-EJ) that can access healthcare (hospitals, community clinics) within 15 minutes = EJ population within 15 minutes of healthcare divided by total EJ population (three community types); non-EJ population within 15 minutes of healthcare divided by non-EJ community population (by mode: auto, transit)

(7) Percent of population (EJ and non-EJ) that can access parks and beaches within 15 minutes = EJ population within 15 minutes of parks and beaches divided by total EJ population (three community types); non-EJ population within 15 minutes of parks and beaches divided by non-EJ community population (by mode: auto, transit)

(8) Distribution of RTP Expenditures (EJ and non-EJ) per capita = dollar value of RTP expenditures serving EJ communities divided by population in EJ communities; dollar value of RTP expenditures serving non-EJ communities divided by population in non-EJ communities. Serving the community is defined as a 1-mile buffer for transit projects and a 5-mile buffer for freeway projects
San Diego Association of Governments

TRANSPORTATION COMMITTEE

June 18, 2010

AGENDA ITEM NO.: 6

Action Requested: RECOMMEND

PROPOSED FY 2011 BUDGET AMENDMENT: LOSSAN BRIDGE REPLACEMENTS File Number 8000100

Introduction

The Naval Facilities Engineering Command (NAVFAC) would like to fund the reconstruction of two bridges along the Los Angeles-San Diego-San Luis Obispo (LOSSAN) corridor in Camp Pendleton and has asked SANDAG to take the lead in the project development and construction. Agreements for the project development and construction are currently being drafted between NAVFAC and SANDAG staff. In order to ensure the start of design work as soon as possible, this action recommends the Executive Director be authorized to enter into agreements to do this work and to take all necessary steps to amend the SANDAG budget after the agreements are signed.

Discussion

In order to facilitate ship-to-shore training by the U.S. Marines, two bridges along the LOSSAN corridor in Camp Pendleton need to be reconstructed to provide additional clearance. The first is Green Beach bridge located on San Onofre Creek at rail mile post (MP) 208.6. The second is Red Beach bridge located on Las Flores Creek at MP 218. NAVFAC has committed to fully fund the reconstruction of both these bridges.

Bridge 208.6 is a wood trestle built in 1926 that is obsolete. It is proposed to be replaced with a steel span bridge on the same alignment as the existing. NAVFAC has a budget of $12.7 million for their Green Beach Access Project, which includes road improvements that NAVFAC will construct. NAVFAC believes the bridge reconstruction would cost $7 million; SANDAG and North County Transit District staffs concur with this estimate.

Bridge 218, built in 1913, is a double barrel unreinforced concrete arch that also is obsolete. It would be replaced with a new concrete bridge adjacent to the existing bridge. NAVFAC has a budget of $12 million for its Red Beach Access project, which includes road improvements that NAVFAC will construct. NAVFAC has estimated that construction of the bridge replacement will cost $6 million. However, the SANDAG estimate is approximately $21 million; the higher costs are due to the track and signal work necessary to tie into the new bridge alignment. Hence, there is a funding shortfall of approximately $15 million for Red Beach bridge for which NAVFAC is seeking additional funds. Although design work may proceed, no construction work will commence until NAVFAC has identified additional funding to complete the project.

Recommendation

The Transportation Committee is asked to recommend that the Board of Directors authorize the Executive Director to enter into agreements with the Naval Facilities Engineering Command to fully fund the project development and reconstruction of LOSSAN bridges 208.6 at Green Beach and 218 at Red Beach and amend the fiscal year 2011 budget accordingly.
In order to develop each of these projects, the Executive Director will need to enter into agreements with NAVFAC for full funding and the fiscal year 2011 budget will have to be amended accordingly.

JIM LINTHICUM
Director of Mobility Management and Project Implementation

Key Staff Contact: Bruce Smith, (619) 699-1907, bsm@sandag.org
San Diego Association of Governments

TRANSPORTATION COMMITTEE

June 18, 2010

AGENDA ITEM NO.: 7

Action Requested: INFORMATION

BLUE AND ORANGE TROLLEY LINE CORRIDOR UPDATE File Number 1210010

Introduction

The SANDAG FY 2010 Program Budget includes San Diego Trolley Blue and Orange Line TransNet Early Action Program (EAP) projects that increase light rail capacity and improve reliability and operations on the Metropolitan Transit System (MTS) rail system. The EAP projects include procuring new low-floor light rail vehicles and retrofitting existing station platforms to be compatible with the low-floor vehicles. The FY 2010 Budget also includes closely related projects for freight improvements and catenary wire replacement. Staff is managing these projects as a single comprehensive corridor to ensure coordination of the budgets, funding, design, construction, and operations. This report provides an update on the status of the program.

Discussion

Program Description

For FY 2011, the SANDAG Budget will include $619.8 million of improvements to the light rail and freight systems operated over MTS right-of-way. These projects are being managed as a single corridor to coordinate the design and construction with the goal of minimizing impacts on rail operations and to schedule construction to match with the delivery of the new low-floor vehicles. Attachment 1, Budget Summary, lists the projects included in the program with budget amounts.

Of the total, $454.2 million of the improvements are for EAP TransNet-funded projects that specifically implement low-floor service on the Trolley Blue and Orange Line. These projects include the procurement of low-floor vehicles and reconstruction of station platforms to provide 8-inch platforms to match the low-floor vehicle accessible boarding ramps. The Blue and Orange Line projects also provides for rail and signaling infrastructure improvements needed to increase system capacity by providing for reduced headways and improved reliability.

Another $147.5 million of the program budget is in two projects that expand freight capacity between downtown San Diego and San Ysidro. The majority of the freight project funding was awarded to SANDAG by the California Transportation Commission (CTC) from the Proposition 1B (Prop. 1B), Trade Corridors Improvement Fund (TCIF) program. The freight projects double the capacity for freight movement between downtown San Diego and San Ysidro.

An additional $17.6 million is budgeted for contact wire replacement on the Blue Line, south of the 12th and Imperial Transfer Station.
Status

Low-Floor Light Rail Vehicles

MTS has executed a contract with Siemens Transportation System, Inc. for 57 new light rail vehicles (LRVs). These vehicles were procured off an MTS option on a Utah Transit Authority contract with Siemens for low-floor LRVs. The new LRVs are 82 feet long and can operate in the existing downtown city blocks and can be coupled to the Siemens SD100 and S70 vehicles in the MTS fleet. The price for each vehicle is $3.7 million, excluding taxes.

Siemens is in the process of creating final design documents and a conformed contract detailing the specific requirements negotiated by MTS. The completion of the design phase and the start of vehicle production are on schedule to take place in November 2010. Siemens has ordered components and subsystems from its suppliers. Delivery of the first vehicle is scheduled for September 2011 and the 57th vehicle in May 2013.

Stations

Thirty five stations on the Blue and Orange Lines will be retrofitted with platforms that are 8 inches above the top of rail to accommodate the low-floor vehicle bridge plates. This will be accomplished by adding a 2-inch overlay on top of existing 6-inch high platforms and rebuilding platforms that are currently level with the top of rail. Construction will be accomplished in phases and coordinated with the delivery of low-floor vehicles. The SANDAG program team is coordinating closely with MTS including frequent contact with its management and Executive Committee. We also are meeting with other agencies and private entities to explain the program and impacts.

The first phase will retrofit eight stations along the bayfront from Washington Street Station to the 12th and Imperial Transfer Station. When these stations are complete, the Green Line service will be extended from Old Town to 12th and Imperial, creating a one seat ride from Santee to downtown, eliminating the transfer at Old Town. This initial station retrofit is referred to as the Green Line Extension. The Green Line Extension design is approximately 70 percent complete. Green Line Extension platforms will receive a 2-inch overlay, except at Santa Fe Depot where brick pavers will be replaced. Shelters will be replaced at all the stations, except at Santa Fe Depot where the existing shelters will be preserved. New shelter designs have been reviewed by MTS. The design has a single row of columns, generally at the back of the platform, with a roof that extends over the platform. The new shelters reduce obstructions of the platform and create an open feel with more cover.

The second phase of the station retrofit will be nine stations from La Mesa Boulevard to 25th and Commercial, referred to as the Orange Line Stations, and six stations downtown from 12th and Imperial to America Plaza, referred to as the Downtown Stations. Design work on the Orange Line Stations is about 50 percent complete except for the station shelters which are being developed. A feasibility study has been completed for the Downtown Stations to evaluate the issues and alternatives for raising platforms at America Plaza, Civic Center and Fifth Avenue by 2 inches. City College and Park and Market Stations were recently reconstructed and designed to accommodate a 2-inch platform overlay. Design of the Downtown stations is about 10 percent complete.

The final phase of station retrofit will be twelve stations on the Blue Line from 12th & Imperial to San Ysidro, referred to as the Blue Line Stations. The platforms at Blue Line Stations, except for San Ysidro, are level with the top of rail. Therefore, the platforms will be reconstructed to 8 inches.
Because of the generally worn state of the existing shelters and the cost of preserving and rehabilitating these shelters, the shelters will be replaced, except at San Ysidro. Work on the Blue Line Stations also includes replacing the track within the station and at adjacent grade crossings. Conceptual design for the station shelters and general layout is nearing completion. The design team is starting final design. The shelter concepts approved by MTS follow the same principal as the Green Line Extension shelters with columns placed at the back of the platforms and roofs extending to the edge of the platform to create cover while maintaining an open feel. Currently, most of the stations have larger shelters on the northbound track and small bus type shelters on the southbound track. The new shelters will be more evenly distributed on the platforms to match the current ridership split. At transit center stations, shelters would be larger to provide cover for the bus platform as well as the trolley platform.

**Track, Signal, and Other Infrastructure Upgrades**

The program includes improvements to the rail infrastructure to facilitate the station reconstruction, and improve operations, capacity and reliability. The infrastructure improvements are on the Blue Line south of 12th and Imperial Avenue. This work will be completed in two phases. The first phase is work needed prior to the construction of the Blue Line stations to provide single track working windows for station contractors. The second phase provides for reliability improvements that will be implemented around or after station work is complete.

The first phase includes three construction projects on the line from 12th and Imperial to San Ysidro: Blue Line Contact Wire, Fiber Optic Cable and Blue Line Crossover and Signaling.

The Blue Line Contact Wire project will replace 15 double track miles of 30-year-old contact wire from 12th and Imperial south. The contractor is procuring material and will start wire replacement in August. Replacing the wire will require rolling weekend closures over short sections of the trolley line for 15 months. MTS will provide bus bridges around the closure areas for its patrons. SANDAG construction engineering, MTS, and the contractor are closely coordinating this work including public notification. The construction contract amount for the wire replacement is $8.9 million, 19 percent below the engineer’s estimate. We also found catenary poles that need to be evaluated for repair or replacement as part of the Blue Line Contact Wire project.

The Fiber Optic Cable project is required to align and clear freight train movements between the San Diego and San Ysidro yards to increase capacity. The Fiber Optic Cable project also provides fiber optic and copper cable needed to support re-signaling of the Blue Line for freight and trolley. Fiber optic installation will start this summer. The contract amount is $4.4 million, 39 percent below the engineer’s estimate.

The Blue Line Crossover and Signaling improvements will reconstruct the signaling system and install rail crossovers to improve Trolley operations and flexibility, allow for reduced headways and allow for single tracking which will greatly increases the construction windows for station reconstruction, reducing cost and time to complete the station work. The design is complete on the Blue Line Crossover and Signaling project. A construction contract will be executed in September.

The second phase of the rail infrastructure improvements includes replacing worn and substandard rail and ties. The design and construction of this replacement work is scheduled for later in the program.
Freight Capacity Projects

The California Transportation Commission awarded SANDAG $123.9 million of Prop. 1B Trade Corridors Improvement Funds for two projects. One project, the Mainline Capacity project, will add freight crossovers, interlockings, siding tracks, train separation technology, and other mainline infrastructure improvements to move additional freight trains on the Blue Line at night after trolley operations cease. The second project, the Yard Expansion project, doubles the storage capacity at the San Ysidro freight yard and improves intermodal freight transfers. Both projects are completing preliminary design and will be starting final design. The Mainline Capacity project will complete construction in 2015, and the yard expansion project is scheduled to be completed in late 2012, assuming state Prop. 1B funding is available at the time of construction.

The Yard Expansion will need environmental clearance with a Mitigated Negative Declaration (MND) including approval of documents under both the California Environmental Quality Act and the National Environmental Policy Act. The MND requires a 30-day public review and comment period, which is anticipated to begin in late June or early July 2010. SANDAG will prepare responses to any comments received during the public review period and is anticipating presenting a final document for Transportation Committee consideration in August or September 2010.

JIM LINTHICUM
Director of Mobility Management and Project Implementation

Attachment: 1. Budget Summary

Key Staff Contact: John Haggerty, (619) 699-6937, jhag@sandag.org
Budget Summary

The Blue and Orange Line Corridor is currently funded in the FY 2011 Budget totaling $619.8 million. Table 1 below shows the current program budget.

Table 1. Blue and Orange Line Corridor FY 2011 Budget Summary

<table>
<thead>
<tr>
<th>CIP #</th>
<th>Name</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>1210000</td>
<td>Low Floor System Improvement Program</td>
<td></td>
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<tr>
<td></td>
<td>EAP Program Management</td>
<td>$500</td>
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<tr>
<td>1210010</td>
<td>Program &amp; Construction Management</td>
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<td>1210020</td>
<td>Blue Line Crossover &amp; Signaling</td>
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<td>1210030</td>
<td>Blue Line Stations</td>
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<td>Rail Infrastructure</td>
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<td>1210050</td>
<td>Blue Line Slope Repair</td>
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<td>1210060</td>
<td>Blue Line Substation Roof</td>
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<td>1210070</td>
<td>System Station Platforms</td>
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<td>1210080</td>
<td>Low Floor Vehicles</td>
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EAP Project Subtotal: $454,694

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<th>Budget</th>
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<td>1300601</td>
<td>San Ysidro Freight Facility</td>
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<td>1300602</td>
<td>South Line Rail Freight Capacity</td>
<td>$107,030</td>
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Other Major CIP Project Subtotal: $165,133

TOTAL $619,827
INTERSTATE 5 NORTH COAST CORRIDOR PROJECT UPDATE

Introduction

Caltrans is finalizing the draft environmental document for the Interstate 5 (I-5) North Coast Corridor Project. The document is scheduled to be released to the public in June 2010. The project limits extend 27 miles from La Jolla Village Drive to Vandegrift Boulevard. The document summarizes four build alternatives that include the addition of two general purpose lanes, no new general purpose lanes, a concrete barrier separating Managed Lanes from the general purpose lanes, and a four-foot painted buffer separating Managed Lanes from the general purpose lanes. All alternatives include the construction of a four-Managed Lane facility in the median of I-5 between the I-5/I-805 merge and State Route (SR) 76 in the City of Oceanside. The project cost estimate ranges between $3.3 billion and $4.4 billion, depending on the alternative selected.

Construction would be completed in phases. The initial phase would construct two high-occupancy vehicle (HOV) lanes in the median from Manchester Avenue to SR 78 at a cost of $300 million. With funding and permits, it is estimated the initial two HOV lane construction phase could be opened to the public by 2014.

The preparation of the I-5 North Coast Corridor Project environmental document is included in the TransNet Early Action Program and the 2008 Regional Transportation Improvement Program. Staff will provide an update on the environmental process, coordination efforts with the California Coastal Commission, and a summary of the planned improvements for the corridor.

The I-5 corridor is frequently referred to as the "gateway to San Diego." The route not only allows for local and commuter trips in the region, but is a life-line for the Southern California/Baja California region, providing a critical link for commercial vehicles traveling between the U.S./Mexico Border and the greater Los Angeles basin. As such, the corridor is a key transportation facility for not only the region, but also the State of California and the nation. In addition, the facility is situated in an environmentally sensitive corridor that includes important natural, visual, and community resources. Consequently, any improvements need to balance the transportation needs with the needs of the environment and neighboring communities.

Over the next 20 years the average daily traffic volume is expected to increase 30 percent along the corridor. Traffic volumes will range between 250,000 and 410,000. If no additional capacity is added to the corridor, congestion will increase. Under free-flow conditions, a trip between La Jolla Village Drive and Vandegrift Boulevard, near SR 76, takes 25 minutes. In 2006, a peak-period trip took between 39 and 44 minutes. If no improvements are made, this same trip is projected to take between 55 and 70 minutes in 2030.

1 Travel time measured Tuesday through Thursday, excluding holidays, northbound and southbound from 6:30 a.m. to 11:30 a.m. and 2 p.m. to 7 p.m. using the Caltrans Performance Monitoring System (PeMS).
The proposed transportation improvements will address the growing traffic demand from a corridorwide perspective and seek to provide a flexible freeway system that provides enhanced opportunities for premium transit services, carpools, and paying solo commuters. The system is planned to complement rather than compete with transit, with facilities designed to promote shared use and to provide priority treatment for high-occupancy vehicles. As part of the managed lanes, the project will feature multiple access points to and from the Managed Lanes, including direct access ramps (DARs). The DARs will provide a direct connection between local arterials and the managed lanes for buses, carpools, vanpools, and paying solo commuters. Locations being studied for the DARs include Voigt Drive, Manchester Avenue, Cannon Road and Oceanside Boulevard. Value pricing technology will be used to adjust toll rates and “manage” the facility similar to the technology currently being used on I-15.

In addition to the draft environmental document, there also will be two companion documents referred to as the Transportation and Resource Enhancement Program and Highway Public Works Plan (TREP/PWP) and the Corridor System Management Plan (CSMP). The TREP/PWP has been developed to provide the California Coastal Commission with a comprehensive plan that addresses coastal resources impacted by proposed transportation improvements within the corridor. The CSMP is a multimodal vision for the corridor’s transportation system that summarizes and provides performance measures for I-5, regional arterials, bicycle/pedestrian routes, bus service, vanpools, and rail service in the corridor. These documents also are scheduled to be available for public review in June 2010.

JIM LINTHICUM
Director of Mobility Management and Project Implementation

Key Staff Contact: Allan Kosup, (619) 688-3611, allan_kosup@dot.ca.gov.
Metropolitan Transit System
FY 2011 Operations Budget

SANDAG Transportation Committee
June 18, 2010

North America’s Outstanding Public Transit System
• Competed in category w/largest transportation systems
• Award based on 14 quantitative categories
• First time in APTA history that one agency’s scores topped all 14 categories
North America’s Outstanding Public Transit System

- Ridership up 12.3%
- Preventable accidents down 14%
- Driver-related complaints down 26.8%
- Costs per revenue hour down 7%
- On-time performance up 6%
- Fleet replacement

$4.8 million received in FY10
- $16.5 million received since 2005
- Continued camera installation
- 30 stations completed by year end
- 29% reduction in Part I crimes on trolley
- Lowest rate among similarly-sized agencies in west
Negotiated Procurement for ADA Services

- Service provides more than 350,000 trips annually
- Contracted service operates 120 MTS-owned vehicles
- Negotiated procurement results in 5% savings, dropping costs to $56.40 per revenue hour

Trolley Renewal Project and Low Floor Procurement

- Reinvestment in transportation infrastructure
  - $239 million in Trolley rehabilitation
  - $233 million in new low-floor cars
  - $148 million in goods movement improvements
- Total transformation of Blue Line
  - Overhead electrical wire
  - Rebuilt station platforms accepting Low-floor cars
  - New shelters
  - New track, switching, signals
- Realignment of Trolley System
  - Green Line extension to Bayside
Compass Card Launch

- Launch began in July 2009
- More than 80% of pass riders have been converted to Compass Cards
- Added convenience for customers
  - Reloadable card
  - Secure value
- New data collection capabilities

Ridership

- Ridership drops; fare revenues remain high
- Unemployment, fare hikes, service changes contribute to drop
- Average fare per rider climbs 14% to $1.04
Performance Measures

- System wide on-time performance: 89.7%
- Revenue hours and passengers per revenue hour
  - Revenue hours reduced by 13.5% since FY 2008

San Diego Metropolitan Transit System
Operating Statistics Trends

*Excludes Para Transit Services
San Diego Metropolitan Transit System
Operating Statistics Comparative

<table>
<thead>
<tr>
<th></th>
<th>Farebox Recovery</th>
<th>Cost per Rev Hour</th>
<th>Subsidy per Passenger</th>
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<tr>
<td>MTS Bus</td>
<td>39%</td>
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<tr>
<td>MTS Rail</td>
<td>53%</td>
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<td>MTS Combined</td>
<td>43%</td>
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<td>KING COUNTY (Wash.)</td>
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<td>UTA (Utah)</td>
<td>18%</td>
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<td>SRTD (Sacramento)</td>
<td>32%</td>
<td>$152.72</td>
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<td>VTA (Santa Clara)</td>
<td>11%</td>
<td>$221.43</td>
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<td>TRI-MET (Portland)</td>
<td>24%</td>
<td>$222.59</td>
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<tr>
<td>RTD (Denver)</td>
<td>22%</td>
<td>$236.97</td>
<td>$3.52</td>
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</table>

Source: 2010 Operating Budget Documents

FY11 Operating Budget Issues/Constraints
Sales Tax generated revenue continues to drop
- TDA/TransNet/STA generated $128M in revenue in FY 2007
- TDA/TransNet* will generate $77M in FY 2011

*TransNet Revenue excludes SuperLoop
FY11 Budget

- Balanced budget
  - Using one-time funds from Capital Program $8.2M
- No fare increases
- No major service adjustments
  - Planning modest increases to service in summer and fall
- Energy savings
  - Total costs drop 15% to $22 million
- No State revenues assumed

### FY 2011 Combined Budget - Revenue/Expense Schedule in (000’s)

<table>
<thead>
<tr>
<th></th>
<th>Amended FY 2010</th>
<th>Budget FY 2011</th>
<th>Variance</th>
<th>Variance Percentage</th>
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<tr>
<td><strong>TOTAL REVENUES</strong></td>
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<tr>
<td>Operating Revenues</td>
<td>91,796</td>
<td>94,411</td>
<td>2,615</td>
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<td>Non Operating Revenues</td>
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<td>124,823</td>
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<td>Reserves</td>
<td>9,784</td>
<td>92</td>
<td>(9,692)</td>
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<tr>
<td>Combined Revenues</td>
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<td>219,326</td>
<td>(11,526)</td>
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<tr>
<td><strong>TOTAL EXPENSES</strong></td>
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<td></td>
<td></td>
<td></td>
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<tr>
<td>Personnel Expenses</td>
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<td>104,608</td>
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<td>Purchased Transportation</td>
<td>53,112</td>
<td>52,522</td>
<td>(590)</td>
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<td>Outside Services</td>
<td>16,484</td>
<td>16,332</td>
<td>(151)</td>
<td>-0.9%</td>
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<tr>
<td>Energy</td>
<td>25,303</td>
<td>21,616</td>
<td>(3,687)</td>
<td>-14.6%</td>
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<td>All Other Expenses</td>
<td>28,475</td>
<td>24,248</td>
<td>(4,227)</td>
<td>-14.8%</td>
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<tr>
<td>Combined Expenses</td>
<td>230,852</td>
<td>219,326</td>
<td>(11,526)</td>
<td>-5.0%</td>
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<tr>
<td><strong>Total Revs Less Exps</strong></td>
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<td>0</td>
<td>(0)</td>
<td>(0)</td>
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</table>
# San Diego Metropolitan Transit System
## Five Year Projections - Summary in (000’s)

<table>
<thead>
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<th></th>
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<tbody>
<tr>
<td>Total Recurring Revenues</td>
<td>211,653</td>
<td>205,887</td>
<td>209,124</td>
<td>213,135</td>
<td>217,966</td>
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<td>Total Recurring Expenses</td>
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<td>217,039</td>
<td>222,464</td>
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<td>Non Recurring Revenues *</td>
<td>92</td>
<td>160</td>
<td>160</td>
<td>160</td>
<td>160</td>
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<tr>
<td>Net Operating Subsidy</td>
<td>(0)</td>
<td>(10,992)</td>
<td>(13,180)</td>
<td>(14,731)</td>
<td>(15,601)</td>
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* Taxicab Administration and SD&E self-funded reserve usage

- FY 2011 includes $8.2M in one-time funding
- Sales tax revenue growth: from 1% in FY 2012 to 4% in FY 2015

---

# Metropolitan Transit System
## FY 2011 Operations Budget

**SANDAG Transportation Committee**

**June 18, 2010**
FY 2011 Budget
SANDAG
Transportation Committee
June 18, 2010

Economic Conditions - unemployment

The New York Times

California Joblessness Reaches 70-Year High

by JENNIFER STERNHAUSER
Published: September 18, 2009

LOS ANGELES — California's unemployment rate in August hit its highest point in nearly 70 years, starkly underscoring how the nation’s incipient economic recovery continues to elude millions of Americans looking for work.

While job losses continue to fall, the state’s new unemployment rate — 12.2 percent, according to the Bureau of Labor Statistics — is far above the national average of 9.7 percent and places California, the nation’s most populous state, fourth behind Michigan, Nevada and Rhode Island. Statistics kept by the state show California’s unemployment rate was 4.7 percent in 1940, said Kevin Calleri, a spokesman for the California Employment Development Department.

While California has recovered under the same blows as the rest of the country over the last two years, its exposure to both the foreclosure crisis and the slowdown in construction — an industry that has fueled growth in much of the state over the last decade — has been outsized.

Total building levels in California have fallen to $23 billion this year from $65 billion in 2005; home building this year is less than a quarter of what it was in 2005, according to the Center for Continuing Study of the California Economy.
State Funding – Diversions in Past Years

FY 2010 Sales Tax-related Revenue Estimates

$17 million less than Feb 2007 projections
February 2009 projections

For perspective, the entire FY 2011 operating budget is about $80 million.

FY 2010 initiatives – NCTD focused on saving costs

- **Contracted out bus operations effective July 2010**
  - Fleet and facilities maintenance to be contracted out in July 2011

- **Reduced staffing in almost all areas of the organization**

- **Renegotiated COASTER, SPRINTER and LIFT contracts**

- **Reduced other contracted services**
FY 2010 initiatives

• Received $2 million in competitive stimulus funding for solar project

The panels shown are already installed, reducing energy consumption

• Completed one of the first Green Data Centers in the transit industry; stimulus funding used to improve infrastructure while reducing energy consumption and costs

• New CNG Facility at West Division begins operations in July; will help reduce maintenance costs
FY 2010 initiatives

• Twenty-four smaller 28-foot buses purchased, to provide more flexible and cost-efficient service

FY 2010 initiatives

• **Google Transit™ Launched**
  
  – Links NCTD service schedules with Google Maps
  – Service schedules now easily accessible from mobile phones
  – Cost effective way to provide trip information to customers
FY 2010 initiatives

- **Marketing initiatives to promote ridership and revenue**
  - College Rides campaign
  - Two-for-one promotions to weekend special events

Results from cost savings initiatives

- **FY 2011 operating budget (projected in February 2009 to be in deficit over $15 million) is balanced**
- **Fares remain the same in FY 2011; no fare increases**
- **Service levels remain the same in FY 2011; no reductions in service**
Five Year Projections – Attachment 5D and 5E

- **Sales Tax Related Revenues**
  - 2 scenarios for TDA and TransNet funding
  - One scenario based on SANDAG/County of San Diego estimates
  - Alternative scenario shows impact of more conservative sales tax projections. Used by NCTD Board as a "stress test" of the five-year projections, for illustrative purposes.

### Budget Outlook FY 2011 through FY 2015 with SANDAG Sales Tax Estimates

<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>TOTAL REVENUE FOR OPERATIONS</strong></td>
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<td>81,893,800</td>
<td>85,078,138</td>
<td>89,377,843</td>
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<td><strong>TOTAL OPERATING EXPENSES</strong></td>
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<td>81,561,689</td>
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<td>3,516,449</td>
<td>5,095,391</td>
<td>7,227,154</td>
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<td>Debt Service - Principal Payments</td>
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<td>1,125,000</td>
<td>1,200,000</td>
<td>1,225,000</td>
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<td><strong>NET ADDITION (REDUCTION) TO RESERVES</strong></td>
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<td>2,391,449</td>
<td>3,895,391</td>
<td>6,002,154</td>
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*Sales Tax Increase Assumptions*

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<thead>
<tr>
<th></th>
<th>FY 2012</th>
<th>FY 2013</th>
<th>FY 2014</th>
<th>FY 2015</th>
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</thead>
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<tr>
<td>4.9%</td>
<td>5.3%</td>
<td>8.1%</td>
<td>6.7%</td>
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### Budget Outlook FY 2011 through FY 2015 with Conservative Estimates

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<tbody>
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<td><strong>Total Revenue</strong></td>
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<td>86,395,130</td>
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<td>84,282,452</td>
<td>86,371,330</td>
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<td><strong>Operating Surplus (Deficit)</strong></td>
<td>0</td>
<td>571,365</td>
<td>506,608</td>
<td>(372,147)</td>
<td>23,800</td>
</tr>
<tr>
<td>Debt Service - Principal Payments</td>
<td>1,100,000</td>
<td>1,125,000</td>
<td>1,200,000</td>
<td>1,225,000</td>
<td></td>
</tr>
<tr>
<td><strong>Net Addition (Reduction) to Reserves</strong></td>
<td>0</td>
<td>(528,635)</td>
<td>(618,392)</td>
<td>(1,572,147)</td>
<td>(1,201,200)</td>
</tr>
</tbody>
</table>

*Sales Tax Increase Assumptions: 1.0% 1.0% 2.0% 3.0%*

### Comparison to Projections from February 2009

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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<tbody>
<tr>
<td>February 2009</td>
<td>-15.5</td>
<td>-19.0</td>
<td>-20.6</td>
<td>-22.5</td>
<td></td>
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<tr>
<td>May 2010 More</td>
<td></td>
<td></td>
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<tr>
<td>Conservative Projections</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>May 2010 SANDAG</td>
<td></td>
<td></td>
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<tr>
<td>Projections</td>
<td></td>
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</table>
June 18, 2010

SANDAG Transportation Committee
401 B Street
San Diego, CA 92101

Re: Item 5 – 2050 Regional Transportation Plan: Draft Performance Plan Measures.

The report before you today clearly demonstrates how much time and effort SANDAG staff dedicated themselves to crafting efficient performance measures and reaching out to stakeholders on the 2050 RTP. Successful performance measures are a valuable tool in encouraging and rewarding projects that provide fast, efficient, and reliable transportation options in our region. We sincerely appreciate the public outreach SANDAG has accomplished with several working groups and agencies involved with the production of these metrics. We ask you to please consider the following:

**Non motorized**: Integrating more non-vehicular performance metrics (such as measuring the percent of population within a half mile of a transit stop under the Social Equity Goal) can be an important tool in rewarding transportation plans and projects that increase cleaner and more sustainable transportation networks in the region.

**Energy consumption.** In Caltrans’ recently released Smart Mobility 2010 Framework, Climate and Energy Conservation performance measure quantifies how much energy is consumed through VMT. This performance tool measures “the effect of transportation and related land use decisions on the management of VMT and compares resulting emissions to State mandated regional targets. GHG emissions and energy consumption are also measures of the successf ulness of location-efficiency and transportation management measures within a regional sustainable community strategy.”

Caltrans’ Climate and Energy Conservation performance measure is an important and effective tool for evaluating the need for future transportation network expansion. The energy conservation measures is a clear indicator that highway expansion can no longer support our energy needs when transit is a much better choice for reducing emissions and conserving energy. We encourage SANDAG to compare this draft performance plan before you today with the components of Caltrans Smart Mobility 2010 Framework. Comparing our performance measures with Caltrans will help us share valuable ideas and suggestions on keeping our region mobile and sustainable.
The performance measures before you should clearly demonstrate a commitment to sustaining a healthy and viable region that supports a world class transit network with high frequency transit projects taking priority. Rewarding sustainable transportation and land use projects today will put our region on the right path towards sustainability and smart planning practices for the next 40 years.

Sincerely,

Elyse Lowe
Executive Director, Move San Diego

EL:nb
Our Region. Our Future.

2050 Regional Transportation Plan

2050 RTP: Draft Plan Performance Measures

June 18, 2010
2050 RTP Process and Timeline

<table>
<thead>
<tr>
<th>Fall 2009</th>
<th>Spring 2010</th>
<th>Summer 2010</th>
<th>Fall 2010</th>
<th>Early 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goals and Objectives</td>
<td>Project Evaluation Criteria</td>
<td>Ranked Projects by Category</td>
<td>Revenue Projections</td>
<td>Revenue Constrained SCS Network Scenarios</td>
</tr>
</tbody>
</table>

2050 RTP Goals, Policy Objectives, & Performance Measures

- System Preservation & Safety
- Mobility
- Prosperous Economy
2050 RTP Goals, Policy Objectives, & Performance Measures (cont’d)

- Reliability
- Healthy Environment
- Social Equity

Example of 2050 RTP Performance Measures

<table>
<thead>
<tr>
<th>Goals</th>
<th>Selected Performance Measures</th>
<th>Revenue Constrained Network Option A</th>
<th>Revenue Constrained Network Option B</th>
<th>Revenue Constrained Network Option C</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Preservation &amp; Safety</td>
<td>Annual projected number of vehicle injury/fatal collisions per capita</td>
<td>●</td>
<td>●</td>
<td>○</td>
</tr>
<tr>
<td>System Preservation &amp; Safety</td>
<td>Percent of transportation investments towards maintenance and rehabilitation</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Mobility</td>
<td>Average work trip travel time</td>
<td>○</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Mobility</td>
<td>Out-of-pocket user costs per trip</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Prosperous Economy</td>
<td>Net benefits</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Prosperous Economy</td>
<td>Return on investment</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Reliability</td>
<td>Percent of total auto travel in congested conditions (peak periods)</td>
<td>○</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Reliability</td>
<td>Percent of total transit travel in congested conditions (peak periods)</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Healthy Environment</td>
<td>Transit passenger miles (all day) per capita</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Healthy Environment</td>
<td>CO2 emissions per capita</td>
<td>●</td>
<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Social Equity</td>
<td>Environmental justice population average travel time per person trip</td>
<td>●</td>
<td>●</td>
<td>○</td>
</tr>
<tr>
<td>Social Equity</td>
<td>Non-environmental justice population average travel time per person trip</td>
<td>●</td>
<td>●</td>
<td>○</td>
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</tbody>
</table>
Recommendation

The Transportation Committee is asked to recommend that the Board of Directors approve the 2050 Regional Transportation Plan (RTP) performance measures in substantially the same form as attached to this report.
San Onofre Creek / Navy Green Beach Bridge

Existing Green Beach Bridge
Marines Training - May 2010

Las Flores Creek / Navy Red Beach Bridge

Existing Red Beach Bridge
Red Beach Bridge Location
PROPOSED FY 2011 BUDGET AMENDMENT: LOSSAN BRIDGE REPLACEMENTS

Recommendation

The Transportation Committee is asked to recommend that the Board of Directors authorize the Executive Director to enter into agreements with the Naval Facilities Engineering Command to fully fund the project development and reconstruction of LOSSAN bridges 208.6 at Green Beach and 218 at Red Beach and amend the fiscal year 2011 budget accordingly.
Blue and Orange Trolley Line Corridor Program

Blue Line
- Contact wire
- Fiber Optic
- Crossover
- Signals/Reverse running
- 8" Platform Re-construction
- Transit Center improvements
- Grade crossings
- Rail replacement
- Retaining walls
- Freight Capacity & Yard

Orange Line
- 8" Platform lift
- Grade Crossings

Green Line
- 8" Platform lift
- Crossover America Plaza

Downtown Stations
- 8" Platform lift
- Crossover America Plaza

57 New Low Floor Vehicles

TROLLEY REHABILITATION PROGRAM
START LOW FLOOR OPERATIONS

<table>
<thead>
<tr>
<th>Line Segment</th>
<th>Start Low Floor Operation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Green Line Extension</td>
<td>January 2012</td>
</tr>
<tr>
<td>8 Stations</td>
<td></td>
</tr>
<tr>
<td>10th Vehicle</td>
<td>Oct 2011</td>
</tr>
<tr>
<td></td>
<td>Jan 2012</td>
</tr>
<tr>
<td>Orange Line/Downtown</td>
<td>July 2012</td>
</tr>
<tr>
<td>15 Stations</td>
<td></td>
</tr>
<tr>
<td>25th Vehicle</td>
<td>Jul 2012</td>
</tr>
<tr>
<td></td>
<td>Jul 2012</td>
</tr>
<tr>
<td>Blue Line</td>
<td>June 2013</td>
</tr>
<tr>
<td>12 Stations</td>
<td></td>
</tr>
<tr>
<td>57th Vehicle</td>
<td>Jun 2013</td>
</tr>
<tr>
<td></td>
<td>May 2013</td>
</tr>
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</table>

PROGRAM BUDGET

<table>
<thead>
<tr>
<th>Project Description</th>
<th>FY 11 Amount</th>
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<tbody>
<tr>
<td>Low Floor Vehicles</td>
<td>$233 Million</td>
</tr>
<tr>
<td>Green Line - Orange Line Stations</td>
<td>$44 Million</td>
</tr>
<tr>
<td>Blue Line Stations</td>
<td>$65 Million</td>
</tr>
<tr>
<td>Blue Line Improvements</td>
<td>$107 Million</td>
</tr>
<tr>
<td>Program &amp; Construction Management</td>
<td>$23 Million</td>
</tr>
<tr>
<td>Freight</td>
<td>$148 Million</td>
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<tr>
<td>Total Costs</td>
<td>$620 Million</td>
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</table>
### DESIGN STATUS

<table>
<thead>
<tr>
<th>Project</th>
<th>Finish Date</th>
<th>% Complete</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Line XO Signals</td>
<td>May 2010</td>
<td>99%</td>
<td></td>
</tr>
<tr>
<td>Green Line Stations</td>
<td>Oct 2010</td>
<td>70%</td>
<td></td>
</tr>
<tr>
<td>Orange Line Stations</td>
<td>Feb 2011</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Downtown Stations</td>
<td>Jan 2011</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Blue Line Stations</td>
<td>Apr 2011</td>
<td>15%</td>
<td></td>
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<tr>
<td>Blue Line Rail Rehab Infrastructure</td>
<td>Dec 2011</td>
<td>0%</td>
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### CONSTRUCTION STATUS

<table>
<thead>
<tr>
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<th>Start Date</th>
<th>Finish Date</th>
<th>% Complete</th>
<th>Status</th>
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<tbody>
<tr>
<td>Contact Wire &amp; Fiber Optic</td>
<td>March 2010</td>
<td>May 2011</td>
<td>10%</td>
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<tr>
<td>Blue Line XO Signals</td>
<td>Nov 2010</td>
<td>Dec 2012</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Green Line Stations</td>
<td>March 2011</td>
<td>Oct 2011</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Orange Line Stations</td>
<td>May 2011</td>
<td>July 2012</td>
<td>0%</td>
<td></td>
</tr>
<tr>
<td>Downtown Stations</td>
<td>Nov 2011</td>
<td>July 2012</td>
<td>0%</td>
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<tr>
<td>Blue Line Stations</td>
<td>March 2012</td>
<td>June 2013</td>
<td>0%</td>
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</table>
### VEHICLE STATUS

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<tr>
<th>Milestone</th>
<th>Start Date</th>
<th>Finish Date</th>
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<tr>
<td>Contract</td>
<td>N/A</td>
<td>Oct 2009</td>
<td>100%</td>
<td>![Green Circle]</td>
</tr>
<tr>
<td>Detail Specifications &amp; Engineering</td>
<td>Dec 2009</td>
<td>Nov 2010</td>
<td>50%</td>
<td>![Green Circle]</td>
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<tr>
<td>Production</td>
<td>Nov 2010</td>
<td>May 2013</td>
<td>0%</td>
<td>![Red Circle]</td>
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</table>

### PROGRAM COORDINATION

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Activity</th>
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<tbody>
<tr>
<td>MTS</td>
<td>Weekly Management Briefings</td>
</tr>
<tr>
<td></td>
<td>Board &amp; Exec Comm. Updates</td>
</tr>
<tr>
<td>Program Executive Team</td>
<td>Alternating Friday Briefings</td>
</tr>
<tr>
<td>Program Team</td>
<td>Alternating Wednesday Meetings</td>
</tr>
<tr>
<td></td>
<td>Issue Meetings, As Needed</td>
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<tr>
<td>Project Teams</td>
<td>Weekly Meetings</td>
</tr>
<tr>
<td></td>
<td>Constant Contact with Program Office</td>
</tr>
<tr>
<td>Other Agencies &amp; Parties</td>
<td>Initial Contacts &amp; Meetings</td>
</tr>
<tr>
<td></td>
<td>Follow Up through Construction</td>
</tr>
<tr>
<td>Construction</td>
<td>Weekly with Project Team Meetings</td>
</tr>
<tr>
<td></td>
<td>Weekly with Contractors Meetings</td>
</tr>
<tr>
<td></td>
<td>Daily Safety Briefings</td>
</tr>
</tbody>
</table>
Low Floor Station Concepts:
• Green Line Extension
• Blue Line Stations

GREEN LINE EXTENSION STATIONS: Shelters
**ORANGE LINE STATIONS**

**Line Elements**
- Urban & Suburban Stations
- Varied Platform Sizes & Heights
- Varied Shelter Types & Condition
- Primary Direction for Peak Hours
- More Sun Exposure
BLUE LINE STATION DESIGN APPROACH

**Line Elements**
- Suburban Stations
- Balanced Travel Pattern
- Consistent Identity
- Large Platforms
- Bus Connections

**Standard Station Elements**
- Site Furnishings
- Lighting
- Wayfinding
- Landscape Palette
- Shelters
- Platform Pavement

**Existing Conditions:**
- Platform level with top of rail
- Large Shelters provide shade, but need major Repair or Replacement
- Small ‘Bus-type’ Shelters provide little shade
- Site elements lack organization
STANDARD SHELTER DESIGN: Treatment Options
Small: 11’ x 25’ and Large: 11’ x 50’

Inspiration: Santa Fe Depot Pavement

TRANSIT CENTER SHELTER DESIGN(S):
22’ x 50’ Shelter
Double Barrel: View One

Double Barrel: View Two
QUESTIONS
I-5 North Coast Corridor
Project Objectives

✔ Quality of Travel
  • Mobility
    • Provide competitive options
    • Reduce/maintain travel times
    • Accommodate regional growth

✔ Livability
  • Enhance communities
    • Improve pedestrian/bicycle access
    • Reduce noise levels
    • Support community character
  • Coastal Access

✔ Sustainability
  • Provide a healthy environment
    • Improve water quality
    • Reduce green house gases
    • Enhance/maintain natural resources
  • Support a prosperous economy
    • Improve tourism
    • Support goods movement

Demand on Corridor Increases 600%

Traffic Volume

Year

1970

2000

2030
Add Time to be On Time

Northbound PM  Southbound AM

Existing Travel Time (min)

20
35
Free Flow 25 Mins

40
25

Buffer
Avg Travel Time

Not Just a Commute Corridor

2006 AADT (000s)

Carmel Valley Rd to Del Mar Hts Rd
Encinitas to Leucadia
Oceanside to Mission

Weekday
Weekend
Congestion Increases, Distance and Duration

Project Alternative Development

Range of Alternatives

- Cost
- Long-term Flexibility
- System Performance
- Natural Resources
- Community
- Location
- Enforcement
I-5 North Coast Corridor
Project Alternatives

No-Build

Buffer Alternatives
- 8 + 4 Buffer
  Cost: $3.3 Billion
- 10 + 4 Buffer
  Cost: $3.8 Billion

Barrier Alternatives
- 8 + 4 Barrier
  Cost: $4.1 Billion
- 10 + 4 Barrier
  Cost: $4.4 Billion

I-5 North Coast Corridor
Direct Access Ramps (DAR)
I-5 North Coast Corridor

Travel Times

Average Peak Corridor Travel Times

<table>
<thead>
<tr>
<th>Minutes</th>
<th>Northbound PM</th>
<th>Southbound AM</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>2006</td>
<td>2006</td>
</tr>
<tr>
<td>10</td>
<td>2006</td>
<td>2006</td>
</tr>
<tr>
<td>20</td>
<td>2006</td>
<td>2006</td>
</tr>
<tr>
<td>30</td>
<td>2006</td>
<td>2006</td>
</tr>
<tr>
<td>40</td>
<td>2006</td>
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<tr>
<td>50</td>
<td>2006</td>
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<tr>
<td>60</td>
<td>2006</td>
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<td>70</td>
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<td>2006</td>
</tr>
<tr>
<td>80</td>
<td>2006</td>
<td>2006</td>
</tr>
<tr>
<td>90</td>
<td>2006</td>
<td>2006</td>
</tr>
</tbody>
</table>

Coaster ML

I-5 North Coast Corridor

Travel Times:
NB p.m. Peak
I-5 North Coast Corridor

Right-of-Way

### Corridor Right-of-way

<table>
<thead>
<tr>
<th></th>
<th>8 + 4 Buffer</th>
<th>10 + 4 Buffer</th>
<th>8 + 4 Barrier</th>
<th>10 + 4 Barrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Full Business Acquisitions</td>
<td>5</td>
<td>6</td>
<td>5</td>
<td>8</td>
</tr>
<tr>
<td>Number of Full Single Family House Acquisitions</td>
<td>19</td>
<td>25</td>
<td>27</td>
<td>29</td>
</tr>
<tr>
<td>Number of Full Multi-Family House Acquisitions</td>
<td>29 Residents</td>
<td>29 Residents</td>
<td>35 Residents</td>
<td>136 Residents</td>
</tr>
<tr>
<td>Number of Partial Acquisitions/Feeding Llamas</td>
<td>171</td>
<td>302</td>
<td>284</td>
<td>298</td>
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</tbody>
</table>

I-5 North Coast Corridor

Natural Resources

### Natural Resources

<table>
<thead>
<tr>
<th></th>
<th>8 + 4 Buffer</th>
<th>10 + 4 Buffer</th>
<th>8 + 4 Barrier</th>
<th>10 + 4 Barrier</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coastal Wetlands (in acreage)</td>
<td>24</td>
<td>27</td>
<td>29</td>
<td>32</td>
</tr>
<tr>
<td>Coastal Dune Scrub (in acreage)</td>
<td>70</td>
<td>73</td>
<td>73</td>
<td>74</td>
</tr>
</tbody>
</table>
Project Reduces Noise Level for 82% of Residences

<table>
<thead>
<tr>
<th>Corridor Noise Impacts (Number of Residences Studied - 2,156)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Residences Impacted by Noise</td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Existing</strong></td>
</tr>
<tr>
<td>1585</td>
</tr>
<tr>
<td>167</td>
</tr>
<tr>
<td>0</td>
</tr>
<tr>
<td><strong>2030 No-Build</strong></td>
</tr>
<tr>
<td>1688</td>
</tr>
<tr>
<td>195</td>
</tr>
<tr>
<td>0</td>
</tr>
<tr>
<td><strong>2030 Build</strong> (of those that would be impacted)</td>
</tr>
<tr>
<td>1933</td>
</tr>
<tr>
<td>549</td>
</tr>
<tr>
<td>1582 / 82%*</td>
</tr>
</tbody>
</table>

* 201 Residences of 2,156 are determined to not be reasonably/faithfully to receive noise abatement.

I-5 North Coast Corridor
Community and Coastal Resource Opportunities

Legend:
- [Legend details]

[Map of I-5 North Coast Corridor with community and coastal resource opportunities marked]
I-5 North Coast Corridor

Progress

✓ Transportation Phasing
  • Completion of Lomas Santa Fe I/C
  • Region funds 7 LOSSAN projects
  • Extension of HOV to SR 78
  • Break ground Carroll Canyon project, July 2010

✓ Community and Natural Resources
  • On-going habitat preservation effort, Environmental Mitigation Program (EMP)
    • 171 Acres ($5.5 Mil)
  • San Elijo Lagoon restoration partnership

Proposed Phasing
I-5 North Coast Corridor

Next Steps

✓ Environmental Process
  • Release Draft Environmental Document, July 2010
  • Public Hearings (5 cities)
  • Integrated corridor vision
    • Public Works Plan (PWP)
    • Corridor System Management Plan (CSMP)
  • Select Preferred Alternative