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### **Agenda**

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc.

March 24, 2005

9:00 a.m.

James R. Mills Building Board Meeting Room, 10th Floor 1255 Imperial Avenue, San Diego

This information will be made available in alternative formats upon request. To request an agenda in an alternative format, please call the Clerk of the Board at least five working days prior to the meeting to ensure availability. Assistive Listening Devices (ADLs) are available from the Clerk of the Board/Assistant Clerk of the Board prior to the meeting and are to be returned at the end of the meeting.

- Roll Call
- 2. Approval of Minutes March 10, 2005

Approve

- 3. <u>Public Comments</u> Limited to five speakers with three minutes per speaker. Others will be heard after Board Discussion items. If you have a report to present, please furnish a copy of the Clerk of the Board.
- 4. Presentation of Employee Awards

Receive



5. <u>Closed Session Items</u> None. Possible Action

### Oral Report of Final Actions Taken in Closed Session

### CONSENT ITEMS - RECOMMENDED BY THE CHIEF EXECUTIVE OFFICER (indicated by \*)

\* 6. SDTI: Rail Lubricant Procurement: Contract Award
Action would authorize the President-General Manager to execute a
Standard Procurement Agreement with Neleco, Inc. to supply
"Synco Super Lube" rail lubricant for a three-year base period with an option for two single-year extensions.

Approve

\* 7. MTS: Property Insurance Renewal

Approve

Action would authorize the CEO to renew the property insurance coverage for MTS, San Diego Transit Corporation, and San Diego Trolley, Inc. with the California State Association of Counties Property Insurance Program, effective March 31, 2005, through March 31, 2006.

\* 8. MTS: Increased Authorization for Legal Services

Approve

Action would authorize the CEO to enter into contract amendments with Bing Bush of the Law Offices of Bing I. Bush, Jr. and Stephen Wismar of Wismar & Barber for general liability and workers' compensation legal services and ratify prior amendments entered into under the CEO's and/or previous General Manager's authorities.

\* 9. <u>Mission Valley East Light Rail Transit Project: Lease Amendment with</u> the San Diego State University Foundation

Approve

Action would ratify the CEO's execution of lease amendments for the second floor of 5814 Hardy Avenue and 5850 Hardy Avenue in the City of San Diego and execute a lease amendment to extend the term of the lease.

\* 10. MTS: Mission Valley East Light Rail Transit Project - Grantville Segment:
Contract Change Order

Approve

Action would authorize the CEO to execute Contract Change Order No. 132, Supplement No. 7, with Modern Continental Construction Company for changes in quantities of landscaping and irrigation in various areas along the Grantville Segment of the Mission Valley East (MVE) Project.

### NOTICED PUBLIC HEARINGS

25. None.

NOTE: A FIVE-MINUTE RECESS WILL BE TAKEN AT APPROXIMATELY 10:30 A.M.

### **DISCUSSION ITEMS**

62.

**Board Member Communications** 

30 MTS: Grievance and Hearing Procedure for Nonunion Employees Approve Action would approve the Grievance and Hearing Procedure for Nonunion Employees of the Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. Possible Action 31. MTS: Draft FY 2005-2009 Regional Short-Range Transit Plan Action would receive a report on the Draft FY 2005-2009 Regional Short Range Transit Plan and provide comments. 32. MTS: Authorization for Use of City of San Diego Billboard Reserve Approve **Funds** Action would approve the proposed concept plans for landscaping improvements at the Euclid Avenue, 47th Street, and Encanto/62nd Street Stations and authorize the release of up to \$220,000 from the City of San Diego Billboard Reserve Fund to the City of San Diego for a final design, construction, and landscape improvements at those stations in City of San Diego, Council District 4. 33. MTS: Green Line Opening Day - Tentative **Approve** Action would approve the tentative opening day for the Green Line and approve the Free Community Ride Day. REPORT ITEMS 45. MTS: 2004 Year-End Security Report Receive Action would receive this report for information. 46. MTS: Status Report on Intelligent Transportation Systems Receive Action would receive this report for information. 47. SDTC: Pension Update Receive Action would receive this report for information. 48. MTS: Operations Budget Status Report for January FY 05 Receive Action would receive the report for information. 49. MTS: January Monthly Performance Indicators Receive Action would receive this report for information. 50. MTS: Comprehensive Operational Analysis: Project Update Receive Action would receive this report for information. 60. Chairman's Report Possible Action 61. Chief Executive Officer's Report Information

### Possible Action

- 63. Additional Public Comments Not on the Agenda

  If the limit of 5 speakers is exceeded under No. 3 (Public Comments) on this agenda, additional speakers will be taken at this time. If you have a report to present, please furnish a copy to the Clerk of the Board.

  Subjects of previous hearings or agenda items may not again be addressed under Public Comments.
- 64. Next Meeting Date: April 14, 2005
- 65. Adjournment

**JGarde** 

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3/17/2005

# METROPOLITAN TRANSIT DEVELOPMENT BOARD ROLL CALL

MEETING OF (DATE):		3/24/05	5	CALL TO ORDER (	TIME):	9:00 a.m.
RECESS:			RECONVENE:			
CLOSED SESSION	:			RECONVENE:		
ORDINANCES ADO	PTED	:		ADJOURN:	1	2:10 p.m.
BOARD MEMBER		(Alternate)		PRESENT (TIME ARRIVED)		SENT LEFT)
ATKINS	Ø	(Vacant)				
CLABBY	Ø	(Greer)				
EMERY	図	(Cafagna)				
EWIN	Ø	(Jantz)			12:03 p.m. o	during Al 50
KALTENBORN	Ø	(N/A)				
LEWIS, Mark	図	(Hanson-Co	x)□		10:51 a.m. o	during Al 46
MAIENSCHEIN	Ø	(Vacant)				
MATHIS	Ø	(N/A)				
MONROE	図	(Tierney)				
MORRISON	Ø	(Zarate)		9:03 a.m. during Public Comments		
RINDONE	Ø	(Davis)		9:02 a.m. during Public Comments		
ROBERTS	Ø	(Cox)			11:30 a.m. ฮ of Al 49	at beginning
ROSE		(Janney)	Ø	9:08 a.m. during Public Comments		:
RYAN		(B. Jones)	Ø			
WILLIAMS	Ø	(Vacant)				
YOUNG		(Vacant)			M	
ZUCCHET	Ø	(Vacant)		9:25 a.m. during Al 31	10:14 a.m. c	luring AI 46
SIGNED BY THE OI	FFICE	OF THE CLER	K OF TH	E BOARD Sail	Millia	ins
CONFIRMED BY OF	FICE	OF THE GENE	RAL CO	unsel <u>Afgley h</u>	theny	m-

Gail.Williams/Roll Call Sheets 1/14/05

# JOINT MEETING OF THE BOARD OF DIRECTORS FOR THE METROPOLITAN TRANSIT DEVELOPMENT BOARD, SAN DIEGO TRANSIT CORPORATION, AND SAN DIEGO TROLLEY, INC.

March 10, 2005

### BOARD OF DIRECTORS MEETING ROOM, 10<sup>TH</sup> FLOOR 1255 IMPERIAL AVENUE, SAN DIEGO

### **MINUTES**

### 1. Roll Call

Chairman Williams called the meeting to order at 9:05 a.m. A roll call sheet listing Board member attendance is attached.

### 2. Approval of Minutes

Mr. Emery moved to approve the minutes of the February 24, 2005, Board of Directors meeting. Mr. Rindone seconded the motion and the vote was 13 to 0 in favor.

### 3. Public Comment

Chuck Lungerhausen: Mr. Lungerhausen welcomed everyone to observe the Water Walkers in Spring Valley on Saturday, April 2, at 10:30 a.m., and requested sponsorship donations. He also stated that he had heard recent complaints from downtown residents regarding the blowing of train whistles at night. He stated that people in earlier times viewed these as the sounds of progress.

Theresa Quiroz: Ms. Quiroz stated that she read the minutes from the February 24, 2005, Board meeting in which the Board was advised that Laidlaw, MTS's current provider of paratransit services, would need to update its equipment for collecting data before they would be able to provide customer service performance indicator data. She stated that, as a member of the City of San Diego Citizens Reviews Committee on Disability Issues, she is constantly getting comments from people about the problems with paratransit service. She stated that she has participated in many meetings in which transit is the topic of discussion, including the Comprehensive Operational Analysis (COA) meetings, and the one common thread is the inadequacy of the paratransit service. She expressed concern that SANDAG's unmet needs findings, which confirm the inadequacy of paratransit service, have not been provided to the Board. She stated that the service that Laidlaw provides is not good. She requested that the Board reverse its decision of February 24, 2005, giving MTS's CEO the authority to sign a contract extension with Laidlaw for the provision of paratransit service. She also suggested that MTS discuss this issue with disabled groups. She stated that these groups are willing to

help reformat the contract so it will be fiscally prudent and give the disabled a satisfactory level of service.

Mark Carlson, Access Center of San Diego Employee for Four Years: Mr. Carlson stated that paratransit does not meet his needs because of time or location of his destination and he must therefore make other arrangements. He complained that the Laidlaw paratransit service is unreliable and inefficient. He added that he has consumers on a weekly basis who are unable to keep appointments because they use paratransit. He also stated that the Laidlaw service needs to become more efficient, reliable, and Laidlaw must take complaints seriously before given a contract extension by MTS.

Annika Anderson, Access Center of San Diego: Ms. Anderson stated that she was speaking on behalf of herself and the consumers she represents through the Access Center who have been unable to get rides on the paratransit service provided by Laidlaw. She stated that she was informed that MTS was renewing its contract with Laidlaw on the understanding that they have provided quality service and have received minimal complaints. She stated that about 100 customer complaints have been collected and shared with MTS representatives. She added that renewing this contract implies that their complaints have not been heard. She urged the Board to stop the renewal of this contract, investigate customer satisfaction issues, and look at how the ADA is being violated.

Linda Flores, San Diego Center for the Blind: Ms. Flores stated that she was speaking on behalf of herself and other people who are disabled. She stated that the renewal of this contract is not acceptable because the service has many flaws. She stated that people are left in the elements for long periods of time and arrive late for important appointments. She added that the ADA states service is in violation of its provisions if there are practices and patterns of untimely scheduling. She felt that the disabled community has not been clearly heard.

Ruben Ceballos, Access Center of San Diego: Mr. Ceballos asked the Board to reconsider its decision regarding the Laidlaw paratransit contract. He stated that there have been many complaints about this service. He felt that Laidlaw was not making MTS aware of the number of complaints. He stated that because of the way the service is structured, it is difficult to people to get to their jobs on time and many times have to leave their jobs early. He stated that they cannot afford to lose their jobs as a result of these difficulties.

Donald Stillwell: Mr. Stillwell expressed concern regarding the location of fire alarms at the Grantville Trolley Station. He also stated that the current routing of Routes 13, 14, and 18 on Alvarado Canyon Road and Mission Gorge Road adds to an existing congestion problem. He added that a mosquito problem is developing as the result of standing water at the Mission San Diego stop.

Betty Bacon: Ms. Bacon stated that MTS's paratransit service is not working and that she has never seen the disabled community so united in its opinion about something. She recalled a couple of personal experiences with the paratransit service and Laidlaw's recall process. She stated that she was unhappy with the current structure for making reservations. She stated that the drivers of the service are wonderful but they feel they have an impossible task. She offered to work with MTS on this issue.

Clive Richard: Mr. Richard reported on his recent experience in which the modes of transportation he was using (bus and trolley) were all late. He stated that MTS needs to improve its on-time performance and stated that trips should occur in a reasonable amount of travel time. He stated that he felt that these aspects of MTS's service were getting worse.

Mr. Jablonski, MTS Chief Executive Officer (CEO), stated that the level of paratransit service is dictated by MTS's own policies. He stated that the service could be more extensive, but improvements would have to be matched by resources. He added that MTS's service is currently consistent with ADA requirements, and an audit conducted by the Federal Transit Administrative (FTA) last summer confirmed that. He stated that Laidlaw's performance, by any national comparison, has been good in terms of on-time performance, which is in excess of 90 percent or 200 passengers out of 2,000 per day. He pointed out to the Board that MTS is currently subsidizing this service at \$25 per person.

Mr. Elliot Hurwitz, Contract Services Administrator, advised the Board that someone has been hired to review paratransit-related complaints and problems related to scheduling of trips.

Linda Woodbury, City of San Diego, Disability Services Coordinator: Ms. Woodbury stated that she does not believe that a shortage of resources explains the inadequate level of paratransit service. She stated that she has repeatedly requested service information in alternate formats and has not received anything. She stated that the disabled community has offered assistance in this area. She advised the Board that paratransit operators are under a lot of pressure and morale is low. She added that they have offered to provide assistance in any way they can to review the contract related to the law and have offered to poll other cities and look at, with an objective eye, ways to make the service more efficient.

Ms. Atkins requested that this issue be referred to staff. She suggested that staff's report to the Board include information on customer satisfaction, complaints, and how complaints have been handled. She requested that staff meet with the disabled community, particularly those organizations that spoke, including Ms. Woodbury, in an effort to get a clear picture of this issue. She also offered the assistance of her staff.

### 4. Presentation of Employee Awards

There were no employee awards.

5. Closed Session Items (ADM 122)

There were no Closed Session Items.

### **CONSENT ITEMS**

6. <u>SDTI: Second and Final One-Year Extension of Nightly Cleaning Services – Contract Amendment</u> (OPS 970.6, PC 30102)

Recommend that the Board of Directors authorize the SDTI President-General Manager

to execute Contract Amendment No. 2 to SDTI Doc. No. C.O.001.0-01 (Attachment A of the agenda item) for a second and final one-year extension of light rail vehicle nightly cleaning services with Calderon Building Maintenance, Inc. (Calderon), for an amount not to exceed \$986,452.30.

7. <u>SDTI: Coupler Parts Procurement: Contract Award</u> (OPS 970.6, PC 30102)

Recommend that the Board of Directors authorize the President-General Manager to execute a Standard Procurement Agreement (Attachment A of the agenda item) with Siemens Transportation Systems, Inc. for supplying SD100 light rail vehicle coupler parts for a total cost, including delivery and taxes, not to exceed \$97,096.22.

8. <u>SDTC: New Flyer Bus Contract Amendment and Fund Transfer for 47 Low-Floor Compressed Natural Gas (CNG) Buses</u> (CIP 10486, 10487)

Recommend that the Board of Directors (1) execute Amendment No. 3 to New Flyer Document No. B0441.3-05 for the addition of manufacturer-supplied tires (shown in Attachment A of the agenda item), in an amount not to exceed \$120,820.55; and (2) transfer a total of \$275,000 into SDTC CNG Bus Purchase (Project Code 1048600). This amount consists of \$185,000 from Contract Services CNG Buses (Project 1048700), and \$90,000 from Chula Vista CNG Buses Project (1048800).

9. MTS: Election to Fill Vacant Position of San Diego and Arizona Eastern (SD&AE)
Railway Company Director (SDAE 710.1, PC 40099)

Recommend that the Board of Directors approve a recommendation from the SD&AE Railway Company Board of Directors to elect (1) Douglas Verity as director to replace the position vacated by Scott Treece; (2) Gene Shepard as the alternate for Douglas Verity; (3) Mike Ortega as the alternate for Thomas Schlosser; and (4) Peter Tereschuck as the alternate for Paul Jablonski.

### Recommended Consent Items

Mr. Rindone moved to approve Consent Agenda Item Nos. 6, 7, 8, and 9. Mr. Clabby seconded the motion, and the vote was 13 to 0 in favor.

### NOTICED PUBLIC HEARINGS

There were no Noticed Public Hearings.

### **DISCUSSION ITEMS**

30. MTS: Proposed Changes to MTS Enabling Legislation (LEG 410, PC 30100)

Ms. Tiffany Lorenzen, MTS General Counsel, reminded the Board that they asked staff to propose changes to MTS's enabling legislation consistent with the intent of Senate Bill 1703 (SB 1703). She reviewed each proposed change in detail. Highlights were as follows: (1) Permit the Board to elect ex officio directors; (2) language specifying that MTS subsidiaries are considered public agencies for purposes of the California Tort Claims Act; (3) changes to procurement procedures to allow for a more flexible, timely, and economic procurement process; (4) judicial review procedures for protests:

(5) clarification of MTS's focus on operational planning; (6) flexibility to legally merge SDTI and SDTC into MTS, and (7) clarification that MTS, SDTC, and/or SDTI may issue pension obligation bonds. Ms. Lorenzen stated that staff is working with outside counsel to determine how best to approach any merging of SDTI and SDTC into MTS.

Ms. Lorenzen reported that staff has reached an agreement with SANDAG on this matter, and state senator Christine Kehoe has agreed to sponsor this legislation. Ms. Lorenzen stated that staff is seeking authorization from the Board to discuss the first draft of this legislation with Senator Kehoe on Transit Lobby Day.

In response to a question from Mr. Monroe, Ms. Lorenzen responded that the recommended change regarding procurement procedures will give MTS flexibility to consider cost in a way that is defined when the Request for Proposal (RFP) is established. Mr. Jablonski stated that life-cycle costing can be used if that is set as criteria for evaluating proposals. Ms. Lorenzen pointed out that, under an RFP, price can be negotiated after a vendor is selected.

Mr. Rindone stated that MTS elected its current ex officio directors to provide input during the transition process and that process is now complete. He also stated that the MTS Board was made a joint board for MTS, SDTC, and SDTI in an effort to streamline. He felt that the ongoing presence of ex officio directors was not the best direction for the Board to go. Mr. Roberts stated that he had a similar recollection. Ms. Lorenzen pointed out that the current terms of Ms. Kaltenborn and Mr. Mathis were extended so they could serve until the completion of the Comprehensive Operations Analysis (COA) process. Ms. Lorenzen pointed out that the recommended language simply states that MTS may appointment ex officio directors and does not specifically identify Ms. Kaltenborn and Mr. Mathis as those directors. Mr. Emery stated that this amendment would give the Board flexibility to appoint ex officio directors if needed at some point in the future. Mr. Roberts pointed out that the Board can do that anyway.

### Action Taken

Mr. Rindone moved to accept the proposed changes to MTS's enabling legislation, excluding Section 120050.5(b) authorizing MTS to appoint ex officio directors. Mr. Emery seconded the motion, and the vote was 14 to 0 in favor.

31. MTS: Coca-Cola Partnership: 2005 Community Relations Events (MKPC 620.8, PC 30100)

Mr. Gonzalo Lopez, Director of Marketing and Community Relations, introduced Ms. Paulina Gilbert, MTS Community Relations Coordinator, and Mr. Charles Simpson, Coca-Cola. He then provided the Board with an overview of MTS's partnership with Coca-Cola. He reviewed the goals of the agreement, the criteria used to select events, and a list of the proposed events for 2005.

Mr. Monroe expressed appreciation for the establishment of criteria for selecting events. He stated that the criteria should also state that MTS will not sponsor events that deal with narrow social issues. He suggested that the Martin Luther King Festival and Parade as well as the Gay Pride Parade be removed from the proposed events list for 2005. He suggested events be added for Poway, Coronado, and the military bases. Mr. Jones agreed that MTS should not participate in events narrow in scope and/or controversial. He suggested events at Town Center Park at the beginning of the new trolley line be included and specifically mentioned a Fourth of July event.

Ms. Rose suggested that an application process be developed. She suggested that a timeframe be established for accepting applications, and that staff review all of the applications at one time. Ms. Rose also suggested that there be a limit to the amount of dollars spent on any given group.

Mr. Roberts agreed with Ms. Rose's comments. He also suggested that events not be automatically supported every year and even automatically excluded for the next one to two years after being sponsored. He added that he didn't object to the proposed list for this year. He also suggested that events more directly related to MTS's mission could be supported.

Mr. Clabby pointed out that the bulk of the money connected with this partnership is devoted to the scholarship program. He stated that the intent of the partnership was to provide the resources for the scholarship program, not sponsorship of community events. He supported the program with no changes.

Ms. Atkins supported the concept of an application process. She also stated that sponsorship of events should be alternated on a geographic basis, and she felt that special parades were acceptable. She also expressed her support of the Martin Luther King event and the Gay Pride Parade and pointed out that 100,000 people are involved in these events. She supported that application process as being fair and equitable and stated that it should not be based on other issues. Mr. Young expressed support of the Martin Luther King Festival and Parade.

Mr. Rindone congratulated Coca-Cola on its involvement in this partnership and felt all areas of the community should be represented. Mr. Emery supported the development of an application process.

Mr. Charles Simpson, Coca-Cola stated that the purpose of the partnership was to use Coca-Cola as a way to communicate with the public, and the funding was to create an educational program to inform students about the benefits of public transit. He added that Coca-Cola participates in many events in many parts of the community without regard to the purpose of the event. He stated that parades were added to the program at the direction of the Board. He stated that, prior to that, Coca-Cola and MTS were partnering for events mainly at trolley centers. He pointed out that the funding is not for grant purposes; it is to be used for marketing opportunities related to public transportation.

### **Action Taken**

Mr. Rindone moved to approve the Coca-Cola Community Relations Events for 2005. Mr. Young seconded the motion, and the vote was 13 to 0 in favor.

#### REPORT ITEMS

### 45. MTS: Ridership Trend Analysis (SRTP 825, PC 20271)

Mr. Conan Cheung, MTS Director of Planning, introduced Mr. Mark Thomsen, Sr. Planner, who did a substantial amount of the work on this report. Mr. Cheung reviewed the report, the purpose of which was to identify probable causes for the recent ridership

decline. He reported that MTS ridership has increased by 300 percent since 1967, but, since FY 2001, ridership has declined significantly despite increases in service hours. He presented staff's analysis of the impact of various unique events (military action, border crossings, fare changes, economy, parking-space availability, tourism, etc), the methodology used, segmentation analysis, national trends, changes in travel patterns in San Diego, mode attractiveness, and how recent service restructuring influenced ridership. Mr. Monroe felt that the decline in military ridership was the result of the location of the bus stop at North Island.

Mr. Cheung pointed out that unique events, including fare increases, do not appear to have had a significant impact on the continued decline in ridership. He stated that the decline appears to be systemic and the result of changes in market composition (demand/characteristics). He stated that the geographic shift in employment and residential locations appears to have contributed to ridership decline, that transit is less competitive than other modes, and there has been a shift from the easily served manufacturing industry (highly concentrated, centrally located, employees with similar work hours) to difficult-to-serve service sectors. Mr. Cheung added that, in at a couple of cases, recent service restructuring has also contributed to the decline. He stated that the results of this ridership analysis validate the need for the COA and reviewed the next steps in the COA process.

Mr. Maienschein stated that he was not surprised by the information in this report. He stated that all Board members have seen these types of reports while performing the duties of their respective roles outside of the MTS Board. He stated that MTS needs to make fundamental changes that allow it to respond to changes more quickly. He also stated that it is important for MTS to attract business people to transit. Mr. Roberts stated that he felt the ridership report was one of the best he had ever seen - that there is something different in this report than others that he has seen. He stated that the Board must redefine its mission and face the fact that, if highly subsidized service is implemented, service provided at lower subsidies will have to be reduced. He stated that job centers may be in different places, but the expense of providing transit to them is an element that must be considered. He stated that MTS must decide if it wants to serve the maximum number of people, reduce freeway congestion, provide more ADA services, increase frequencies where service is already provided, etc. He stated that the COA is needed to address some of these questions. He added that cost background on MTS's services would be helpful. He also stated that service changes that do not yield good results should be reexamined and adjusted quickly, and MTS needs to be more responsive to its markets. He suggested that policy decisions that need to be made be identified and presented to the Board. Mr. Rindone suggested that MTS consider a multiple-hub system.

Mr. Rindone made a motion to have a special meeting to discuss policy issues related to this matter. He felt that the Board's position on these matters would be useful during the COA process.

Mr. Jablonski stated that the policy issues will be addressed during Phase II, Regional Service Concept, of the project. Mr. Cheung reported that there is still much information to be presented as the COA progresses. Mr. Emery stated that this is the first time he has seen such a report and felt that the CEO was putting MTS "on the right track." He stated that MTS needs to identify those people who need transit and concentrate its service in those areas. Mr. Monroe agreed that MTS needs to redefine its mission. He

also stated that he thought the Blue Ribbon Committee would be making policy decisions such as those that have been discussed. He felt that MTS should identify the end product for each area and work back from that point. Mr. Cheung stated that the Blue Ribbon Committee will provide guidance to staff in the development of policy options, but the Board will make the policy decisions. He added that staff will be recommending efficiency measures that can be implemented prior to completion of the COA. He added that the major system overhaul will be part of Phase II.

Mr. Clabby reported that may people live significant distances from their jobs, and it is hard to provide reasonable travel times on transit under those circumstances. He suggested that the Board members on the Blue Ribbon Committee have a strategy meeting with Mr. Cheung.

### Action Taken

Mr. Emery moved to receive this report for information with the suggestion that a meeting be held to formulate the recommendations that are inherent in the COA process. Mr. Young seconded the motion asking that Mr. Maienschein's questions be addressed, and the vote was 11 to 0 in favor.

46. MTS: 2004 Year-End Security Report (OPS 970.11, PC 30102)

### **Action Taken**

Mr. Emery moved to continue this item. Mr. Maienschein seconded the motion, and the vote was 11 to 0 in favor.

47. MTS: Status Report on Intelligent Transportation Systems (ITS) (CIP 10940)

### Action Taken

Mr. Emery moved to continue this item. Mr. Maienschein seconded the motion, and the vote was 11 to 0 in favor.

60. <u>Chairman's Report</u> (ADM 121.7, PC 30100)

There was no Chairman's Report.

61. Chief Executive Officer's Report (ADM 121.7, PC 30100)

There was no discussion of this item.

### 62. Board Member Communications

Donna Garcia Incident: Ms. Sterling reported that Ms. Donna Garcia reported that construction debris from one of MTS's projects fell on her car. She told Ms. Sterling that she was thrilled with the way her claim was handled by MTS. Ms. Sterling thanked staff for their efforts in this matter.

### 63. Additional Public Comments on Items Not on the Agenda

There were no additional public comments.

### 64. Next Meeting Date

The next regularly scheduled Board meeting is Thursday, March 24, 2005, at 9:00 a.m. in the same location.

### 65. Adjournment

Chairman Williams adjourned the meeting at 11:58 a.m.

Chairman

San Diego Metropolitan Transit

Development Board

Filed by:

Approved as to form:

Office of the Clerk of the Board San Diego Metropolitan Transit Development Board Office of the General Counsel
San Diego Metropolitan Transit
Development Board

Attachment: A. Roll Call Sheet

gail.williams/minutes

## METROPOLITAN TRANSIT DEVELOPMENT BOARD ROLL CALL

MEETING OF (DATE)	):	3/10/05		CALL TO ORDER (1	TIME): 9:05 a.m.
RECESS:		· · · · · · · · · · · · · · · · · · ·		RECONVENE:	
CLOSED SESSION:		·		RECONVENE:	
ORDINANCES ADOP	TED:			ADJOURN:	11:58 a.m.
BOARD MEMBER		(Alternate)		PRESENT (TIME ARRIVED)	ABSENT (TIME LEFT)
ATKINS E	<b>Ø</b>	(Vacant)			10:42 a.m. during AI 30
CLABBY I	<b>A</b>	(J. Jones)			
EMERY I	<b>a</b>	(Cafagna)			
KALTENBORN [		(N/A)			Ø
LEWIS, Mark	Ø	(Hanson-Cox	:) <b>□</b>		
MAIENSCHEIN I	Ø	(Vacant)			
MATHIS [		(N/A)			团
MONROE I	<b>☑</b>	(Tierney)			
MORRISON (		(Zarate)			团
RINDONE I	<u> </u>	(Davis)			11:43 during AI 45
ROBERTS I	Ø	(Cox)			
ROSE I	<b>A</b>	(Janney)		9:51 a.m. during AI 30	
RYAN I		(B. Jones)	<b>I</b>		
STERLING I	<b>1</b>	(Ewin)			
WILLIAMS I	<b>1</b>	(Vacant)			
YOUNG I	Ø	(Vacant)			
ZUCCHET I	Ø	(Vacant)		9:06 a.m. after approval of minutes	10:40 a.m. during Al 30
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CONFIDMED BY OF		E THE CENE		LINGEL O A dol	lea a m

### SAN DIEGO METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

REQUEST TO SPEAK FORM

AGENDA ITEM NO.

2	
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ORDER REQUEST RECEIVED	1	
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\*\*PLEASE SUBMIT THIS COMPLETED FORM (AND YOUR WRITTEN STATEMENT) TO THE CLERK OF THE BOARD PRIOR TO DISCUSSION OF YOUR ITEM\*\*

### 1. INSTRUCTIONS

This Request to Speak form <u>must be filled out and submitted in advance of the discussion of your item</u> to the Clerk of the Board (please attach your written statement to this form). Communications on hearings and agenda items are generally limited to three (3) minutes per person unless the Board authorizes additional time. However, the Chairperson may limit comment to one or two minutes each if there are multiple requests to speak on a particular item. General public comments on items not on the agenda are limited to three (3) minutes. Please be brief and to the point. No yielding of time is allowed. Subjects of previous Hearings or agenda items may not again be addressed under General Public Comments.

Date3/24/05 Name (PLEASE PRINT) Chuck Lingshain	·-··
Address	
Telephone	
Organization Represented (if any)	
Subject of your remarks: Pen attached	•
Agenda Item Number on which you request to speak  Your comments are presenting a position of: SUPPORT OPPOSITION	

### 2. TESTIMONY AT NOTICED PUBLIC HEARINGS

At Public Hearings of the Board, persons wishing to speak shall be permitted to address the Board on any issue relevant to the subject of the Hearing.

### 3. DISCUSSION OF AGENDA ITEMS

The Chairman may permit any member of the public to address the Board on any issue relevant to a particular agenda item.

### 4. GENERAL PUBLIC COMMENTS ON MATTERS NOT ON THE AGENDA

Public comment on matters not on the agenda will be limited to five (5) speakers with three (3) minutes each, under the Public Comment Agenda Item. Additional speakers will be heard at the end of the Board's Agenda.

\*\*REMEMBER: Subjects of previous Hearings or agenda items may not again be addressed under General Public Comments.\*\*

DGunn/SStroh / FORMS REVREQFO.DGUNN — 10/15/03

# Mar. 24, 2005 MTS mtg. AGENDA ITEM #3 ( Public Comment)

Good morning Chair Williams, Board members, Staff, and other fellow citizens. Chuck Lungerhausen of 5308 Monroe Ave. #124 which is in the SDSU neighborhood of San Diego. 92115 Phone 619-546-5610

A week from this Saturday on April 2nd will be the 2005 MS Walk for team Water Walkers at "The Splash" Frogs Club One in Spring Valley at 10:30 am. To this date have received \$3,380 in sponsorship donations and without the matching funds from Harrah's Rincon Casino of \$2050 last year, there is no way this fund raiser can make up that amount. Have had some people increase the amount given, but not all of last years donors have come forward with their same amounts so it looks like the total amount collected by me will be a little less than last year's total of \$5905

Again I request your sponsoship donations of \$20, \$25 or larger amounts if you are able to be so generous. Actually any size amount is most welcome and thank you to all who have already donated.

Your checks should be made out to the National MS Society or a cash donation should be accompanied with a business card or note indicating your address so a thank you message can be sent.

Now on the subject of public transportation this Monday arrived at San Diego State Transit Center on the route 81 from Old Town a few minutes before 2:00 pm and then went to wait for the next 955 bus to my home. As I sat waiting a short distance from the 955 bus shelter a bus like the 955 with its Headliner saying not in service stopped by the shelter and talked with a couple persons in the shelter. Then this bus starts to leave with its door open and an individual jumps aboard I started to think this is a dangerous way to avoid picking up a wheelchair dependent passenger. Sorry I did not get the number of the bus and I don't want anyone fired but someone needs better training........

Thank you for listening and the opportunity to speak.

### SAN DIEGO METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

REQUEST/TO SPEAK FORM AGENDA ITEM NO.

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ORDER	REQU	<b>JEST</b>	REC	CEIVED
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\*\*PLEASE SUBMIT THIS COMPLETED FORM (AND YOUR WRITTEN STATEMENT) TO THE CLERK OF THE BOARD PRIOR TO DISCUSSION OF YOUR ITEM\*\* Q 8:52

### 1. INSTRUCTIONS

This Request to Speak form must be filled out and submitted in advance of the discussion of your item to the Clerk of the Board (please attach your written statement to this form). Communications on hearings and agenda items are generally limited to three (3) minutes per person unless the Board authorizes additional time. However, the Chairperson may limit comment to one or two minutes each if there are multiple requests to speak on a particular item. General public comments on items not on the agenda are limited to three (3) minutes. Please be brief and to the point. No yielding of time is allowed. Subjects of previous Hearings or agenda items may not again be addressed under General Public Comments.

Date $3/24/\sigma S$
Name (PLEASE PRINT) CRISTOBAL TORRES
Address 2142 NATIONAL AV.
SAN DIESO 92113
elephone 619 702 7004
Organization Represented (if any) MENTALLY HANDICAPPED
AND HOMELESS CITIZENS ADVOCATE
Subject of your remarks: SAFETY FOR PEDESTRIANS
ALONG C ST.
Agenda Item Number on which you request to speak

### 2. TESTIMONY AT NOTICED PUBLIC HEARINGS

At Public Hearings of the Board, persons wishing to speak shall be permitted to address the Board on any issue relevant to the subject of the Hearing.

### 3. DISCUSSION OF AGENDA ITEMS

The Chairman may permit any member of the public to address the Board on any issue relevant to a particular agenda item.

### 4. GENERAL PUBLIC COMMENTS ON MATTERS NOT ON THE AGENDA

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\*\*REMEMBER: Subjects of previous Hearings or agenda items may not again be addressed under General Public Comments.\*\*

DGunn/SStroh / FORMS REVREQFO.DGUNN — 10/15/03 C-STROCT DODWSO



1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466 FAX 619.234.3407

### **Agenda**

Item No. 6

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc.

March 24, 2005

OPS 970.6 (PC 30102)

Subject:

SDTI: RAIL LUBRICANT PROCUREMENT: CONTRACT AWARD

### RECOMMENDATION:

That the Board of Directors authorize the President-General Manager to execute a Standard Procurement Agreement (Attachment A) with Neleco, Inc. to supply "Synco Super Lube" rail lubricant for a three-year base period with an option for two single-year extensions. The total cost, including delivery but excluding California sales tax, for a three-year base period shall not exceed \$576,000.00.

### **Budget Impact**

The total cost of \$576,000.00 for the rail lubricant would come from the FY 05 – FY 08 San Diego Trolley, Inc. (SDTI) operating budget Track Maintenance line item.

### **DISCUSSION:**

The SDTI Track Department uses special-purpose rail lubricant in tight radius curves throughout the system to reduce excessive rail wear and noise. Based on the testing of various lubricants a few years ago, Synco Super Lube was the only product found to be effective in reducing rail noise as well as rail wear. In 2002, Neleco, Inc. was awarded the procurement contract to provide Synco Super Lube for SDTI's rail lubricant needs for a period of three years; that contract expires in March 2005. In January 2005, SDTI advertised a request for bids for supplying Synco Super Lube or approved equal rail



lubricant for a period of three years with an option for two 1-year extensions. In response, two bids were received. Dagmar Enterprises submitted the low bid, but its product did not meet the service-proven requirements of the specification. The specification required the product to be in use at a minimum of five rail transit properties for five years. The product proposed by Dagmar Enterprises has been in use only at one rail transit property for less than two years; therefore, Dagmar Enterprises' bid is considered nonresponsive. Neleco, Inc submitted the only other responsive bid. The unit price submitted by Neleco was same its original contract price three years ago for the same quantity. With an increase in quantity for the addition of the Mission Valley East tracks, our unit price will be actually lower than our original payment in the previous contract.

The Workforce Report for Neleco, Inc. (Attachment C) is attached for information.

Paul C. Jablonski

Chief Executive Officer

Key Staff Contact: Russ Desai, 619.595.4908, rdesai@sdti.sdmts.com

JGarde MAR24-05.6.RDESAI 3/4/05

Attachments: A. Standard Procurement Agreement

B. Bid Summary

C. Workforce Report for Neleco, Inc. (Board Only)

# San Diego Trolley, Inc. An Operator in the Metropolitan Transit System



1255 Imperial Avenue Suite 900 San Diego, CA 92101-7492 (619) 595-4949 Telefax: (619) 238-4182

### STANDARD PROCUREMENT AGREEMENT

C.O.018.0-05 CONTRACT NUMBER

## DRAFT

OPS 970.6 (PC 30102) FILE NUMBER(S) day of April 2005, in the state of California by and between

THIS AGREEMENT is entered into this San Diego Trolley, Inc. (Board), and the follo	day of April 200 wing contractor, h	ວ5, in the ereinafter	e state of California by a r referred to as "Contrac	nd between stor":
Name: Neleco, Inc.	Addr	ess: <u>6</u>	675 VFW Parkway	
Form of Business: <u>Corporation</u> (Corporation, partnership, sole proprietor, etc.)	 c.) Tele	-	Chestnut Hill, MA 02467 (781) 341-5050	
Authorized person to sign contracts: Pau	ıl E. R. Di Benedet Name	<u>ti</u>	<u>Presiden</u> Title	t
The attached Standard Conditions are pathe Board services and materials, as follows Supply "Synco Super-Lube" rail lubricant for per month, in accordance with the bid specific proposal.  The total amount of this contract including from period shall not exceed \$576,000.00.	ows: a three-year perio fications dated Jan	d, not to luary 31,	exceed 600 pails per ye 2005, and the attached	ear or 50 pails cost
SAN DIEGO TROLLEY, INC.		C	CONTRACTOR AUTHORIZ	ATION
By:General Manager		Firm: _		
Approved as to form:		Ву:	Signature	
By:General Counsel		Title: _		
AMOUNT ENCUMBERED	BUDGET I	ΓEM	F	ISCAL YEAR
\$576,000.00	San Diego Trolle	y (PC 30	)102) F	Y 05 – FY 08
By:  Director of Finance and Administrat  (Continued on sheets)	ion			Date ns\AI Attachments\ ttachments - 2005\ ATTA.RDESAI.doc



### **BID SUMMARY**

# RAIL LUBRICANT PROCUREMENT San Diego Trolley, Inc. (SDTI)

Bids Due to SDTI:	March 3, 20	05, at 2:00 p.m.
-------------------	-------------	------------------

	Bid Unit Price
Neleco, Inc. 675 VFW Parkway, Chestnut Hill, MA. 02467	\$320.00**
Dagmar Enterprises, LLC 10425 Marty Street, Suite 200, Overland Park, KS. 66212	\$215.88*
**Responsive low bid *Non-responsive – Did not meet "Service Proven Requirement" of the specifica	ation.
Russ Desai Project Manager	

1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX 619.234.3407

### **Agenda**

Item No. 7

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc.

March 24, 2005

LEG 491 (PC 30100)

Subject:

MTS: PROPERTY INSURANCE RENEWAL

### RECOMMENDATION:

That the Board of Directors authorize the Chief Executive Officer (CEO) to renew the property insurance coverage for MTS, San Diego Transit Corporation (SDTC), and San Diego Trolley, Inc. (SDTI) with the California State Association of Counties (CSAC) Property Insurance Program, effective March 31, 2005, through March 31, 2006, with basic coverage deductible of \$25,000, \$100,000 for collision on buses and light rail vehicles, and \$1,500,000 on roads, bridges, and tunnels.

### **Budget Impact**

The renewal premium is \$756,889, which is about 18% higher than last year's premium of \$642,353. This increase is attributed to the added coverage value (\$223,061,606) of the Mission Valley East Light Rail Transit Project. The premium is anticipated to be charged against the budgets of MTS (\$9,978), SDTC (\$120,747), and SDTI (\$626,165). No budget adjustment is proposed at this time. Fiscal year 2006 budgets are being developed, and funds will be designated and included within them.

PROPERTY PREMIUM ESTIMATED FISCAL YEAR SPLIT							
Policy Period: 03/31/05 - 03/31/06							
Agency	FY 05	FY 06	TOTAL PREMIUM				
MTS	\$2,494	\$7,483	\$9,978				
SDTC	\$30,187	\$90,560	\$120,747				
SDIII	\$156,541	\$469,624	\$626,165				
TOTAL	\$189,222	\$567,667	\$756,889				



### **DISCUSSION:**

MTS's property insurance policy expires on March 31, 2005, and covers the real and personal property of MTS, SDTC, and SDTI. The policy is obtained through CSAC, a joint purchase group of all but a handful of California counties created for the purpose of obtaining insurance at a reduced cost. SDTC has been insured through this group since 1993. Effective November 1, 1997, all MTS entities became insured with CSAC.

The CSAC Property Program is a complex layering of multiple insurance carriers, including both domestic and European insurers. Most of the CSAC members, including both the City and County of San Diego, purchase earthquake insurance. MTS and its entities have elected not to purchase this optional coverage.

The entire CSAC Program consists of 54 of the 58 California counties, which gives them tremendous purchasing power with premiums. At the inception of the three-year purchasing endorsement, CSAC listed premiums to be over \$35 million. This allows MTS to take advantage of significant leverage in the marketplace.

Coverage provided is on an "all-risk" basis, which means for a loss to be excluded from coverage, a loss must arise from a peril specifically excluded in the policy. Some perils excluded in our policy are earthquake, wear and tear, pollution, war risk, fraud (by an employee), nuclear radiation, and loss to trees, money, or watercraft. These exclusions do not include all of the perils or properties specifically excluded, but gives an idea of the kind of losses that would not be covered. As a legal contract, an insurance policy may require extensive effort to determine if disputed coverage exists.

Our current policy carries a blanket limit of \$590 million, which applies to perils for any one occurrence (some sub limits are applicable to specific type of losses). We have a \$25,000 self-insured retention per occurrence, \$100,000 for collision on buses and light rail vehicles, \$250,000 for comprehensive coverage on buses, and \$1,500,000 on roads, bridges, and tunnels. In general, loss valuation is on a replacement-cost basis.

The premium is increasing 18 percent over the previous year. The policy includes terrorism coverage for all CSAC members. In general, the premium rate charged per unit value remains very competitive within the insurance marketplace.

Paul Cablonski
Chief Executive Officer

Key Staff Contact: James Dow, 619.557.4562, jim.dow@sdmts.com

JGarde MAR24-05.7.JDOW 2/28/05



1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466 FAX 619.234.3407

### **Agenda**

Item No. 8

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. LEG 491 (PC 30100)

March 24, 2005

Subject:

MTS: INCREASED AUTHORIZATION FOR LEGAL SERVICES

### RECOMMENDATION:

That the Board of Directors authorize the Chief Executive Officer (CEO) to enter into contract amendments with Bing Bush of the Law Offices of Bing I. Bush Jr. (MTDB Doc. No. G0873.4-03, Attachment A), and Stephen Wismar of the law firm Wismar & Barber (MTDB Doc. No. G0730.3-02, Attachment B) for general liability and workers' compensation legal services, in substantially the same form as attached, and ratify prior amendments entered into under the CEO's and/or previous General Manager's authority(ies).

### **Budget Impact**

Unknown at this time. Not to exceed \$30,000 for Bing Bush, and not to exceed \$35,000 for Stephen Wismar.

### DISCUSSION:

On December 13, 2001, the MTD Board approved a list of qualified attorneys for general liability and workers' compensation for use by MTDB, San Diego Trolley, Inc. (SDTI), and San Diego Transit Corporation (SDTC) staff on an as-needed basis. MTDB thereafter contracted with 26 local attorneys at an average of \$25,000 per initial contract.

Pursuant to Board Policy No. 13 (Procurement of Services), the CEO may enter into contracts with service providers for up to \$100,000. The Board must approve all



agreements in excess of \$100,000. Some attorneys have multiple cases that are or have proceeded to trial, and the total cost of their legal services will exceed \$100,000.

Bing Bush is currently under contract with the agencies for \$100,000. Mr. Bush has successfully defended SDTC in a number of cases. Outstanding invoices currently total approximately \$29,928, and multiple cases are in process. We therefore request additional authority of \$30,000, for a total authorization of \$130,000.

Stephen Wismar is currently under contract with the agencies for \$100,000. Mr. Wismar has successfully defended SDTC in a number of workers' compensation cases. Invoicing for ongoing work is anticipated to exceed current contract amount limits in the near future. We therefore request additional authority of \$35,000, for a total authorization of \$135,000.

The CEO has approved prior amendments for both of these contracts totaling \$100,000. Board ratification of the prior contracts/amendments is also requested.

Paul C. Jablonski

Chief Executive Officer

Key Staff Contact: James Dow, 619.557.4562, jim.dow@sdmts.com

**JGarde** MAR24-05.8.JDOW 3/7/05

Attachments: A. Doc. No. G0873.4-03

B. Doc. No. G0730.3-02



1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 (619) 231-1466 • FAX (619) 234-3407 Att. A, Al 8, 3/24/05, LEG 491



March 24, 2005

MTDB Doc. No. G0873.4-03 LEG 491 (PC 30100)

Mr. Bing Bush Law Offices of Bing I. Bush Jr. 501 West Broadway, No. 1220 San Diego, CA 92101

Dear Mr. Bush:

Subject: AMENDMENT NO. 4 TO MTDB DOC. NO. G0873.0-03: LIABILITY LEGAL SERVICES

This letter will serve as Amendment No. 4 to MTDB Doc. No. G0873.0-03. This contract amendment authorizes additional costs not to exceed \$30,000 for professional services. The total value of this contract, including this amendment, is \$130,000. Additional authorization is contingent upon MTDB approval.

If you agree with the above, please sign below and return the document marked "original" to the Contracts Administrator at MTDB. The other copy is for your records.

Sincerely,	Accepted:		
Paul C. Jablonski Chief Executive Officer	Bing Bush Law Offices of Bing I. Bush Jr.		
JGarde	Date:		





1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 (619) 231-1466 • FAX (619) 234-3407 Att. B, AI 8, 3/24/05, LEG 491



March 24, 2005

MTDB Doc. No. G0730.3-02 LEG 491 (PC 30100)

Mr. Stephen Wismar Wismar & Barber 2727 Camino Del Rio South, Suite 220 San Diego, CA 92108-3740

Dear Mr. Wismar:

Subject: AMENDMENT NO. 3 TO MTDB DOC. NO. G0730.0-02: WORKERS' COMPENSATION

LEGAL SERVICES

This letter will serve as Amendment No. 3 to MTDB Doc. No. G0730.0-02. This contract amendment authorizes additional costs not to exceed \$35,000 for professional services. The total value of this contract, including this amendment, is \$135,000. Additional authorization is contingent upon MTDB approval.

If you agree with the above, please sign below and return the document marked "original" to the Contracts Administrator at MTDB. The other copy is for your records.

Sincerely,	Accepted:		
Paul C. Jablonski Chief Executive Officer	Stephen Wismar Wismar & Barber		
JGarde CL-G0730.3-02.JDOW	Date:		



1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX: 619.234.3407

### Agenda

Item No. 9

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc.

CIP 10426.6

March 24, 2005

Subject:

MTS: MISSION VALLEY EAST LIGHT RAIL TRANSIT PROJECT: LEASE AMENDMENT WITH THE SAN DIEGO STATE UNIVERSITY FOUNDATION

### RECOMMENDATION:

That the Board of Directors authorize the Chief Executive Officer's (CEO's) to execute lease amendments for the second floor of 5814 Hardy Avenue and 5850 Hardy Avenue in the City of San Diego and ratify a prior amendment entered into under the CEO's and/or previous General Manager's authority(ies) to extend the term of the lease in substantially the form attached (Attachment A).

### **Budget Impact**

The cost of the lease amendment is \$143,346.59 and will be funded from the Mission Valley East (MVE) Light Rail Transit (LRT) Project Right-of-Way line item (WBS #10426-0900) that has an available balance of \$187,472. Previous amendments totaling \$37,613.82 were executed under the CEO's contracting authority and previously encumbered.

### DISCUSSION:

MTS entered into a lease of the second floor of 5814 Hardy Avenue and the entirety of 5850 Hardy Avenue on June 22, 2001. The properties are owned by the San Diego State University (SDSU) Foundation. The lease was required as noise mitigation to the SDSU Foundation Grant Program offices. MTS used the second floor of 5814 Hardy Avenue as construction field offices and demolished the buildings on









Metropolitan Transit System (MTS) is a California public agency and is comprised of San Diego Transit Corporation and San Diego Trolley, Inc. nonprofit public benefit corporations, in cooperation with Chula Vista Transit and National City Transit. MTS is the taxicab administrator for eight cities and the owner of the San Diego and Arizona Eastern Railway Company. MTS member agencies include: City of Chula Vista, City of Coronado, City of El Cajon, City of Imperial Beach, City of La Mesa. City of Lemon Grove, City of National City, City of Poway, City of San Diego, City of Santee, and the County of San Diego.

5850 Hardy Avenue for use as a laydown yard. The properties were leased for three years for \$1,079,100, ending on May 31, 2004.

Terms of the lease required MTS to compensate the SDSU Foundation for tieback installations required for shoring construction of the underground station. The fee was \$100 per tieback. The SDSU Foundation charged MTS under the terms of the agreement for 280 tiebacks, totaling \$28,000. The lease also required MTS to pay taxes and utilities for the buildings, which totaled \$9,613.81. These additional costs were paid to the SDSU Foundation using the CEO's contracting authority.

Currently the lease needs to be extended on a month-to-month basis to accommodate the construction staff on site through the completion of MVE. The total cost of the lease amendment to accommodate the extended term beginning June 1, 2004, is \$143,346.59.

Paul C. Jablonski Chief Executive Officer

Key Staff Contact: Tim Allison, 619.699.6908, tal@sandag.org

JGarde MAR24-05.9.ALLISON 3/7/05

Attachment: A. Lease

June 25,	2004
Subject:	First Amendment to Lease - 5814 and 5850 Hardy Avenue MTDB Doc. No. L6381.T=01 .3-01
2004, by Corporati	Amendment to Lease is made and entered into this day of, and between San Diego State University Foundation, a California Non-profit ion, (hereinafter referred to as "Lessor") and San Diego Metropolitan Transit ment Board (hereinafter referred to as "Lessee").
Lessor ar	nd Lessee entered into a lease dated June 22, 2001, (the "Lease"), covering property d as 5814 and 5850 Hardy Avenue in the County of San Diego, California.
The term	s of the Lease are hereby amended as follows:
1. Th	ne Term of the Lease, as described in Paragraph 2, shall be extended on a month to both basis beginning June 1, 2004, with 30 day written of notice of termination.
Th	essee agrees to pay to Lessor the rent of \$18,793 per month during the Extension. the rent is broken down by address as follows: 5814 - 2 <sup>nd</sup> floor at \$4,633 per month; 50 at \$14,160 per month.
	s expressly modified herein, all of the terms and conditions of the Lease and First ent shall remain in full force and effect.
	ESS WHEREOF, Lessor and Lessee have duly executed this Amendment to Lease day and year first written above.
Lessor:	SAN DIEGO STATE UNIVERSITY FOUNDATION
Ass.	10/25/04
By Lo	vis Haberkern Date rector Facilities Management
Lessee:	SAN DIEGO METROPOLITAN TRANSIT DEVELOPMENT BOARD
•	ul C. Jablonski Date ief Executive Officer
Approved	as to form:

Date

By:

Tiffany Lorenzen, Interim General Counsel



1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX: 619.234.3407

### **Agenda**

Item No. 10

CIP 10426.7.3

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc.

March 24, 2005

Subject:

MTS: MISSION VALLEY EAST LIGHT RAIL TRANSIT PROJECT - GRANTVILLE SEGMENT: CONTRACT CHANGE ORDER

### RECOMMENDATION:

That the Board of Directors authorize the Chief Executive Officer (CEO) to execute Contract Change Order (CCO) No. 132, Supplement No. 7, with Modern Continental Construction Company (MCC), in substantially the same form as shown in Attachment A, for changes in quantities of landscaping and irrigation in various areas along the Grantville Segment of the Mission Valley East (MVE) Project (LRT-426.3), in an amount not to exceed \$137,166.60, including a net amount of \$72,422.60 approved by the previous General Manager and the CEO with the original CCO No. 132 and Supplement Nos. 1 through 6.

### **Budget Impact**

A total of \$64,774.00 for CCO No. 132, Supplement No. 7, for the Grantville Segment would be encumbered from the MVE LRT Extension Construction contingency (line item WBS 10426-109918GR), leaving a balance of \$43,357 in the Grantville Segment Construction Contingency line item. The funds for the original CCO No.132 and previous Supplement Nos. 1 through 6 have already been encumbered under this construction contingency.

### **DISCUSSION:**

MCC is the prime contractor for the construction of the Grantville Segment (LRT-426.3) and began work in December 2001. CCO No. 132, Supplement No. 7 is requested to pay MCC for increased quantities of work ordered by MTS on various landscape and irrigation systems throughout the alignment of the Grantville Segment.



During the last three years of construction, there have been many changes in the types and quantities of the landscape and irrigation areas on the Grantville Segment. Previous changes began with CCO No. 132 in April 2004 for a deduction (credit to MTS) of \$254,394. MTS requested changes to the landscape and irrigation plans and special provisions by eliminating or severely reducing seven bid items for work throughout the linear project, with a majority along Camino Del Rio North and Adobe Falls Road. With the extra widening of these city streets, areas of landscaping and irrigation were not necessary, and further changes would be necessary in the future when final improvements were determined and installed.

Subsequently Supplement No. 1 added back in \$45,000 worth of work for the removal of oversized, unsuitable landscape backfill material and importing suitable material within the California Department Transportation's (Caltrans') right-of-way in addition to revised connections to the existing Caltrans' irrigation systems. Similarly, Supplement No. 2 added back in \$33,156 worth of landscaping, irrigation, and roadway work when the final grades and widths of the above two city streets were completed.

Supplement Nos. 3 and 4 were again credited to MTS for eliminating landscaping and irrigation in the vicinity of the Waring Road (Supplement No. 3 - \$6,348) and eliminating landscaping and irrigation on the south side of the Interstate 8 (I-8) freeway right-of-way with Caltrans' consent (Supplement No. 4 - \$6,994).

Supplements Nos. 5 and 6 were for the removal of materials that were unsuitable for landscaping purposes, including oversized rocks, and importing suitable landscaping soils for many areas along the I-8 freeway corridor, for an additional \$262,000.

CCO No. 132, Supplement No. 7 is the latest supplement and raises the net total over the \$100,000 threshold of the CEO's authority. Supplement No. 7 is the adjustment in compensation of bid item Nos. 202 through No. 209, inclusive, that were over the original Engineer's Estimate. This figure was calculated to be \$64,774.00; therefore, \$137,166.60 represents the net cost for Supplement Nos. 1 through 7 after the contractor has given MTS credit for portions of the original landscape and irrigation elements deleted.

Staff has evaluated the contractor's cost and pricing proposal for this extra work and previous supplements, finds it reasonable, and recommends that this CCO be approved. The MCC Workforce Report (Attachment B) is attached for information.

Paul C. Jablopski Chier Executive Officer

Key Staff Contact: Dennis Wahl, 619.235.2635, dwa@sandag.org

LTorio/10-05MAR24.DWAHL - 3/7/05

Attachments: A. MCC Contract Change Order No. 132, Supplement No. 7

B. MCC Workforce Report – (Board Only)



### **CUNTRACT CHANGE ORDER (CCO)**

Contract No. LRT- 426.3

#### **MVE GRANTVILLE SEGMENT**

File: 104267

Report Date: 01/28/05

Page 1 of 1 pages

CCO NO.

132

SUPPLEMENT NO.

7

REVISION NO.

ó

TO:

Modern Continental

You are hereby directed to make the herein described changes from the plans and specifications or do the following described work not included in the plans and specifications on this contract.

NOTE: This change order is not effective until approved by The General Manager

Description of work to be done, estimate of quantities, and prices to be paid. Segregate between additional work at contract price, agreed price and force account. Unless otherwise stated, rates for rental of equipment cover only such time as equipment is actually used and no allowance will be made for idle time.

Change requested by Engineer

#### Estimate of Adjustment Compensation

Revise the Credit on the original CCO 132 to reflect the accurate quantities and unit prices for the new items reflected on the revised Drawing Sheets Nos. 573, 574, 577, 578, 581 to 586, 589 to 597, 607, 612 to 614, 620 to 623, and incorporated in the original change order (CCO 132 - Supplement 0).

Adjustment of Compensation to the Bid Items, are calculated per Section 6-3, Cost Breakdown, of the Special Provisions New item prices were negotiated in a meeting with the Contractor and the Engineer.

Total Estimate for Adjustment of Compensation is \$64,774.00

Adjustment Comp. Estimate \$64,744.00

Total Change This Supplement:

\$64,744.00 (Increase)

			· .		
By reason of this order the time	of completion will be adjusted as follows:	No Adjustment	-	:	
Submitted by:	Resident Ingileer	Amon Ruelas	Da:	te_ 1~28-07	
	Construction Engineer	William A. Prey		· .	
	Director of Engineering General Manager Pa	-	Jim Linthicu	tete	
			· · · · · · · · · · · · · · · · · · ·	tura will records all sourcest furnish	n n11
	, have given careful consideration to the charies be noted above, and perform all service				
Accepted, Date	Contractor	: Modern Continent	al		
Ву			Title	· · · · · · · · · · · · · · · · · · ·	
If the contractor does not sign a	acceptance of this order, his attention is dire	cted to the requirements of the speci	fications as to proceeding w	ith the ordered work and filling a writte	en protest



### **CONSTRUCTION MEMORANDUM**

Report Date: 01/28/05

#### Contract No. LRT- 426.3

#### **MVE GRANTVILLE SEGMENT**

File: 104267 Page 1 of 2 pages

CONTRACTOR:

Modern Continental

CCO NO. SUPPLEMENT NO. 132

TO: FROM: William A. Prey Ramon Ruelas

REVISION NO.

7 n

Amount of Change:

\$64,744.00 (INCREASE)

Description:

Revision of L & I Credit to Supp 0

#### THIS CHANGE ORDER PROVIDES FOR

Landscape and Irrigation credit revisions in the original CCO 132.

The original CCO 132 (Supplement 0) involves changes to the contract work for Landscape and Irrigation, for the entire project, as a cost reduction measure requested by MTDB.

The original quantities were propagated by the Landscape Architect (LA) and were used to draft the original CCO 132, using the approved schedule of values. Subsequent to the approval of the change order, the quantities were revised by the same LA and resulted in a lower amount of credit. There was also a delay in the agreement with the Contractor on a few unit prices for irrigation and landscape items that were added to the contract by the original revision. This supplement reflects the accurate quantities and new unit prices, arrived in a negotiation meeting between the Contractor and the Engineer.

The estimated cost for this credit revision is an add of \$64,774.00, as an Adjustment of Compensation to the following contract items:

	Original .	Revised	Difference
1. Bid Item No. 202	\$ -74,813.00	\$ -14,482.00	\$ 60,331.00
2. Bid Item No. 203	\$ - 3,994.00	\$ - 5,094.00	\$ - 1,100.00
3. Bid Item No. 204	\$ -63,487.00	\$ -63,515.00	. \$ - 28.00
4. Bid Itėm No. 205	0.00	\$ - 244.00	\$ - 244.00
5. Bid Item No. 206	\$ -64,474.00	\$ -63,378.00	\$ 1,096.00
6. Bid Item No. 207	\$ - 4,579.00	\$ - 8,773.00	\$ -4,194.00
7. Bid Item No. 208	\$ -40,819.00	\$ -34,316.00	\$ 6,503.00
8. Bid Item No. 209	\$ - 2,228.00	\$ 182.00	\$ 2,410.00

There is no time adjustment related to this change.

(continued next page)

WBS TOTALS:

MOD DOND

WBS 10426109918GR

Change \$64,744.00

WBS Balance (\$56,643.04)

REASONS FOR CHANGE ORDER: MTDB Concept: 100.00%

IALT I	J DUA	עט				
1)	AI#	0	/	/		\$0.00
2)	AI#	0	/	'/		\$0.00
3)	AI#	0	. /	/		\$0.00
TOT	ral .					\$0.00

Approved by:

Name

Name

Construction Engineer

Date Dir. of Eng. and Const.

PENDING CONTRACT CONTINGENCY BALANCE (including this change)

THIS

\$0.00

\$0.00 \$0.00

SUPPLEMENT

\$64,744.00

\$64,744.00

(\$56,643.04)

Items

Total

Ramon Ruelas Resident Engineer

ESTIMATE OF COST:

Force Account

Adjustment Comp.

Agreed Price

TOTAL TO DATE

THIS CCO \$3,180.60

\$0.00

\$330,000.00

\$137,166.60

(\$196,014.00)

Date

CM Project Manager



### **CONSTRUCTION MEMORANDUM**

Contract No. LRT- 426.3

### **MVE GRANTVILLE SEGMENT**

Report Date: 01/28/05

File: 104267
Page 2 of 2 pages

Request for transfer of funds, from construction to contingency, has been submitted to the Board for approval.

This change order was discussed with Matt Britten, SANDAG Project Manager, Hadii Samii, Consultant Design Engineer, and Constantine Kontaxis, Caltrans Oversight Engineer, and has their concurrence.

oval History			
Dir. Eng./Const.	(\$254,394.00) TTD	(\$254,394.00)	04/27/04
General Manager	\$45,000.00 TTD	(\$209,394.00)	03/11/04
General Manager	\$33,158.60 TTD	(\$176,235.40)	06/01/04
Const. Engineer	(\$6,348.00) TTD	(\$182,583.40)	04/06/04
Const. Engineer	(\$6,994.00) TTD	(\$189,577.40)	04/22/04
Dir. Eng./Const.	\$20,000.00 TTD	(\$169,577.40)	06/27/04
General Manager	\$242,000.00 TTD	\$72,422.60	(not approved)
General Manager	\$64,744.00 TTD	\$137,166.60	(not approved)
	Dir. Eng./Const. General Manager General Manager Const. Engineer Const. Engineer Dir. Eng./Const. General Manager	Dir. Eng./Const. (\$254,394.00) TTD General Manager \$45,000.00 TTD General Manager \$33,158.60 TTD Const. Engineer (\$6,348.00) TTD Const. Engineer (\$6,994.00) TTD Dir. Eng./Const. \$20,000.00 TTD General Manager \$242,000.00 TTD	Dir. Eng./Const. (\$254,394.00) TTD (\$254,394.00) General Manager \$45,000.00 TTD (\$209,394.00) General Manager \$33,158.60 TTD (\$176,235.40) Const. Engineer (\$6,348.00) TTD (\$182,583.40) Const. Engineer (\$6,994.00) TTD (\$189,577.40) Dir. Eng./Const. \$20,000.00 TTD (\$169,577.40) General Manager \$242,000.00 TTD \$72,422.60



1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX: 619.234.3407

# **Agenda**

Item No. <u>30</u>

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. ADM 150.2 (PC 30100)

March 24, 2005

Subject:

MTS: GRIEVANCE AND HEARING PROCEDURE FOR NONUNION EMPLOYEES

#### RECOMMENDATION:

That the Board of Directors approve the Grievance and Hearing Procedure for Nonunion Employees (Attachment A) of the Metropolitan Transit System (MTS), San Diego Transit Corporation (SDTC), and San Diego Trolley, Inc. (SDTI).

**Budget Impact** 

None.

#### **DISCUSSION:**

#### Summary

The attached Grievance and Hearing Procedure for Nonunion Employees will require management and other nonunion employees to resolve employment disputes internally, rather than resolving such disputes in expensive and time-consuming lawsuits in court.

At the Board of Directors meeting on January 13, 2005, the Board directed staff to distribute the proposed Grievance and Hearing Procedure to all nonunion employees so that they could provide feedback.

The proposed Grievance and Hearing Procedure was sent to all nonunion staff with a summary of the pros and cons of the policy. Staff was also notified that the item would



be before the Board again, and that if they had any questions or concerns, they could contact Jeff Stumbo, Director of Human Resources and Labor Relations.

A few employees met with Mr. Stumbo to have their questions answered, and to date, we have received no negative feedback.

What follows is the background information that was included in the January 13, 2005, agenda item.

#### Background

Prior to 2004, MTDB, SDTC, and SDTI (the Agencies) were essentially run as three separate entities with their own personnel policies. As part of the process of consolidating the Agencies, we believe it is in the best interest of the Agencies to have a single internal grievance and hearing procedure to resolve employment disputes for nonunion employees. As to the union employees of SDTC and SDTI, their collective bargaining agreements between the corporations and the unions provide a grievance and arbitration procedure to resolve employee disputes. However, there is nothing comparable for management and other nonunion employees.

The primary rationale for implementing a grievance and hearing procedure is to attempt to resolve employee disputes internally, rather than leaving employees with no choice but to file a lawsuit in court to resolve an employment dispute. The procedure will allow employees to file an internal grievance with the agency that made the decision in dispute. The agency will attempt to resolve the dispute informally. If that fails and the agency denies the grievance, the employee can proceed to an informal hearing before a three-person Grievance Committee. Both parties can present documents and witnesses to the Grievance Committee and argue their case. The Grievance Committee will make a final decision to sustain, deny, or sustain in part the grievance.

#### Pros and Cons of the Grievance and Hearing Procedure

The advantages of using the Grievance and Hearing Procedure are as follows:

- Employees have a fair internal procedure that they can utilize to resolve employment disputes informally without the need for court litigation.
- Resolution of disputes in this manner is much quicker and less expensive than resolving them in court.
- Except in limited circumstances, employees will be required to use this
  procedure rather than going to court, which will save legal expense for both
  parties.
- If the employee receives an adverse finding from the Grievance Committee, he
  or she will have to challenge that decision in court within 90 days, ensuring that
  the matter will not drag out indefinitely.
- If the decision of the Grievance Committee is challenged in court, in order to prevail, the employee will have to demonstrate that the Grievance Committee abused its discretion in making the decision.

 In the court proceedings to challenge the decision of the Grievance Committee, there is no formal discovery such as depositions, interrogatories, or requests for production of documents as the court proceedings are based on the administrative record developed before the Grievance Committee. Eliminating the formal discovery from the court process saves both parties significant time and legal expenses.

The primary disadvantage of utilizing the Grievance and Hearing Procedure is that management employees of the Agencies must spend the time and effort to conduct the hearing on each grievance. The internal hearing will require the three members of the Grievance Committee, the Director of Human Resources, and the manager who made the decision in dispute to spend considerable time in considering the merits of the grievance.

On balance, we believe the Grievance and Hearing Procedure should be adopted by the Board. Although the procedure will require more work by Agencies managers, it will save considerable legal expenses, as more employee disputes will be resolved internally without using legal counsel. Further, if an employee does challenge the decision of the Grievance Committee in court, the court action will be much quicker and less expensive than a normal employment lawsuit.

Paul C. Jablonski Chief Executive Officer

Key Staff Contact: Jeff Stumbo, 619.557.4509, jeff.stumbo@sdmts.com

JGarde MAR24-05.30.JSTUMBO 2/14/05

Attachment: A. Grievance and Hearing Procedure

#### **APRIL 1, 2005**

# GRIEVANCE AND HEARING PROCEDURE FOR NONUNION EMPLOYEES OF MTS AND ITS SUBSIDIARIES, SAN DIEGO TRANSIT CORPORATION AND SAN DIEGO TROLLEY, INC.

The Metropolitan Transit System (MTS) and its subsidiaries, San Diego Transit Corporation (SDTC) and San Diego Trolley, Inc. (SDTI) (hereinafter collectively referred to as "the Agencies") recognize and endorse the importance of considering and adjusting employee disputes and grievances properly. The Agencies encourage the informal and prompt settlement of grievances and have established the orderly process set forth below. All disputes, claims, or issues subject to this process must be resolved in accordance with these provisions, and this process shall be the sole internal method for the resolution of all grievances to the fullest extent permitted by applicable law. This grievance and hearing procedure applies to all nonunion employees of the Agencies.

#### A. Definition of Grievances Covered by This Procedure

A grievance covered by this procedure is broadly defined as any claim by an employee, or a group of employees, that there has been a breach, misinterpretation, or misapplication of a personnel policy by their employer, or a claim that the employer has taken any employment action in violation of applicable California or federal law. A grievance includes, but is not limited to, claims of breach of contract, invasion of privacy, defamation, infliction of emotional distress, claims of wrongful termination or wrongful demotion, denial of a promotion, any claim of discrimination recognized under state or federal law, including sex, pregnancy, race, national origin, age, religion, creed, marital status, sexual harassment, sexual orientation, mental or physical disability discrimination, retaliation, claims under any "whistleblower" law, and any claims for improper payment of salary or wages, or claims that the employer failed to comply with any state or federal wage and hour law, including the California Labor Code, the California Industrial Welfare Commission Orders, or the federal Fair Labor Standards Act.

This procedure does not cover claims for workers' compensation benefits, unemployment insurance benefits, or claims for benefits under a benefit plan if that plan provides an appeal procedure for resolution of disputes under the plan.

#### B. Submission and Initial Processing of Grievances

- 1. A grievance must be submitted in writing to the Human Resources Department of the agency for which the employee works within 30 calendar days, either after the grievant(s) received notice of the occurrence of the event(s) upon which the grievance is based, or after the grievant knew or through the exercise of reasonable diligence should have known of the occurrence of the event(s) upon which the grievance is based. The written grievance must clearly state the alleged wrong and against whom the grievance is directed, providing all pertinent information available to the grievant(s) at the time of the filing of the grievance, including any relevant documents in support of the grievance. The grievance may contain any other data the grievant(s) deems pertinent.
- 2. A manager of Human Resources for one of the Agencies will be responsible for administering each grievance filed under this procedure. If reasonably practical, a manager of Human Resources who was not directly involved in the personnel matter about which the grievance has been filed will be assigned to administer the grievance and hearing procedure.

- 3. Within 21 calendar days from receipt by the Human Resources Department of a written grievance, the assigned manager of Human Resources shall determine whether the allegations, as stated in the written grievance, if true, constitute a violation of a personnel policy or applicable law. The manager of Human Resources can attempt to adjust or resolve the grievance at any time during this process.
- 4. If the manager of Human Resources determines that the allegations as stated in the written grievance, even if true, do not constitute a violation of a personnel policy or applicable law, he or she shall deny the grievance in writing. If the grievance was not timely filed according to this procedure, the grievance shall be denied. If the grievance is denied, the manager of Human Resources shall advise the grievant in a written communication stating the reasons for the denial of the grievance.
- 5. If the manager of Human Resources determines that the allegations as stated in the written grievance, if true, constitute a violation of a personnel policy or applicable law, he or she shall attempt to resolve the grievance through negotiation and/or mediation where such process is acceptable to all concerned parties. With the consent of the parties to the grievance, the manager of Human Resources may assist in the selection of an appropriate mediator if the grievance goes to mediation. Other relevant parties may be invited to participate in the mediation. A negotiated or mediated resolution is permissible and appropriate at any stage of this grievance procedure.

#### C. <u>Grievance Hearing Procedure</u>

If the grievance is denied and is not resolved through negotiation or mediation, the grievant(s) shall be entitled to an evidentiary hearing before a Grievance Committee according to the following procedures:

- 1. Within 14 calendar days of receipt of the written notice from the manager of Human Resources denying the grievance, the grievant can request a hearing on the grievance by providing written notice to the manager of Human Resources of the grievant's desire for a hearing. Failure to request a hearing in writing within this time period shall be deemed a waiver by the grievant of his or her right to utilize the hearing procedure, and the grievance shall then be considered closed.
- 2. The manager of Human Resources will select a Grievance Committee composed of three members from among the management employees of the Agencies. The manager of Human Resources will notify the proposed members of the nature of the grievance.
- 3. Within seven calendar days from the date the manager of Human Resources formally notifies the grievant of the members of the Grievance Committee, the grievant may challenge any Committee member on the basis that the member harbors unfair bias. This challenge shall be made in writing and supported by any information the grievant wishes to submit. The manager of Human Resources shall make a final determination on this challenge within seven calendar days from the submission of the challenge.
- 4. Schedules permitting, the Grievance Committee should convene a prehearing meeting no later than 14 calendar days from the date of the final formation of the Grievance Committee at a date, time, and place agreeable to members of the Committee, the grievant and a representative of the agency that made the decision that is the subject of the grievance (herein referred to as "the parties").

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- 5. At the initial meeting of the Grievance Committee, in consultation with the parties, the Committee should attempt to:
  - (a) Determine the facts about which there is no dispute. These facts may be established by stipulation.
  - (b) Define the issues to be decided by the Grievance Committee.
  - (c) Set a time for both sides to exchange a list of witnesses and copies of exhibits to be presented at the hearing. The Grievance Committee has the discretion to limit each party to those witnesses whose names were disclosed to the other party prior to the hearing and to otherwise limit evidence to that which is relevant to the issues before the Grievance Committee.
  - (d) Specify whether prehearing or posthearing statements will be submitted by the parties as well as the deadlines for those briefs.
  - (e) Obtain agreement about whether any person other than a management representative, the parties, their advisors, if any, and witnesses who are before the committee may be present during all or part of the hearing. In order to preserve the confidentiality of the hearing, persons whose presence is not essential to a determination of the facts shall, as a general rule, be excluded from the hearing.
  - (f) Set a date for the evidentiary hearing. The hearing should be set as soon as possible in view of any necessary prehearing activities and the schedules of the participants. The hearing may include more than one session if necessary, and every effort should be made to conclude it within 60 days of the prehearing meeting.
- 6. There is no right to representation by counsel for either party in connection with the hearing. The director of Human Resources of MTS or his or her designee may act as the representative of the agency that made the decision that is the subject of the grievance. The Grievance Committee may exclude any person from the hearing upon a finding that the person is unduly disrupting the conduct of the hearing.
- 7. Each party should be afforded an opportunity to obtain necessary witnesses and documentary or other evidence. The Grievance Committee may, upon an appropriate showing of need by any party or on its own initiative, request relevant files and documents under the control of management or the grievant(s), or request management's assistance in securing the presence of material witnesses. Where confidential information is provided, the Grievance Committee shall preserve confidentiality to the fullest extent possible.
- 8. The parties shall be entitled to be present at all sessions of the Grievance Committee when evidence is being received. Each party shall have the right to present its case by oral and documentary evidence, to submit rebuttal evidence, and to conduct such cross-examination as may be required for a full and true disclosure of the facts.

-3- **A-3** 

- 9. The hearing need not be conducted according to technical legal rules relating to evidence and witnesses. The Grievance Committee may call witnesses or make evidentiary requests on its own volition. Where a witness is unavailable, written statements may be considered. The Grievance Committee should require that all witnesses affirm the truthfulness of their testimony.
- 10. No evidence other than that presented at the hearing shall be considered by the Grievance Committee or have weight in the proceedings, except that the Grievance Committee may receive into evidence any facts that are of public record, commonly known, or otherwise not reasonably subject to dispute. Parties present at the hearing shall be informed of matters thus received, and each party shall be given a reasonable opportunity to object to the Grievance Committee's consideration of such matters.
- 11. At the hearing, the grievant(s) shall bear the burden of proving the validity of the grievance by a preponderance of the evidence; i.e., more probable than not.
- 12. The hearing shall be recorded by audiotape. The parties and their representatives shall have the right to a copy of any recording of the proceedings. The cost of the copy shall be assumed by the requesting party. In addition, written minutes should be kept.
- 13. Questions of procedure arising during the hearing process shall be resolved by the Grievance Committee, which in its discretion, may consult with the General Counsel of MTS regarding such procedural matters.
- 14. Within 21 calendar days from the conclusion of the hearing process, or as soon thereafter as reasonably possible, the Grievance Committee shall provide a written decision containing findings of fact, conclusions supported by a statement of reasons based on the evidence, and a decision to sustain, sustain in part, or deny the grievance. The manager of Human Resources shall serve a copy of the Grievance Committee's decision by first class mail on the grievant, and shall provide a copy to the agency representative involved in the grievance. The copy of the decision sent to the grievant shall be accompanied by a notice stating that if the grievant wishes to seek judicial review of the decision, he or she must do so within 90 days of the date of the decision, and in accordance with the provisions of California Code of Civil Procedure Section 1094.6.
- 15. The decision of the Grievance Committee shall be final and binding and shall be considered the final decision of the Agencies.

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1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX 619.234.3407

# **Agenda**

Item No. <u>31</u>

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. SRTP 810.05 (PC 20223)

March 24, 2005

Subject:

MTS: DRAFT FY 2005-2009 REGIONAL SHORT-RANGE TRANSIT PLAN

#### RECOMMENDATION:

That the MTS Board of Directors receive this report on the Draft FY 2005-2009 Regional Short-Range Transit Plan (RSRTP) and provide comments.

**Budget Impact** 

None at this time.

#### **DISCUSSION:**

As a result of agency consolidation, the San Diego Association of Governments (SANDAG), in collaboration with MTS and North County Transit District (NCTD), is responsible for preparing a Regional Short-Range Transit Plan (RSRTP). The annual RSRTP sets short-range goals and objectives for the transit system to support the long-range vision for transit contained within the Regional Transportation Plan (RTP) and Regional Comprehensive Plan (RCP). The RSRTP provides the regionwide plan for transit system adjustments and improvements over the next five years to ensure a comprehensive, productive, and efficient transit system and to move the system toward the long-range vision.

There are several factors that will have an impact on this year's update of the RSRTP. The region continues to experience transit-operating resource constraints. In addition, the MTS Comprehensive Operational Analysis (COA) is expected to result in a major restructuring of MTS-area transit services. The COA results will feed into next year's



RSRTP update. Still, it is important to develop a short-range plan this year to identify transit system needs and potential services for the time when funding is more abundant. The RSRTP also supports federal grant application, the preparation of the annual operating budgets, and the consolidated Transportation Development Act (TDA) claim.

On March 4, 2005, the SANDAG Transportation Committee released the Draft RSRTP for a 45-day public review period. The complete Draft FY 2005-2009 RSRTP is included as Attachment A. This report summarizes the key elements of the FY 2005-2009 RSRTP and describes the process leading to its adoption.

#### Plan Purpose and Organization

The purpose of the RSRTP is to define the existing transit system; evaluate existing services and programs; identify transit system needs and deficiencies; establish goals, objectives, and parameters for new service development; evaluate and establish priorities for new and revised service proposals; and identify future areas of study.

#### The RSRTP is organized as follows:

- Chapter 1 provides an introduction to the plan and describes the role of the plan in the regional planning process.
- Chapter 2 presents the strategic vision for the future of transit in the San Diego region, as defined in the RTP and describes the process and guidelines governing transit service planning and development in the region.
- Chapter 3 describes the existing and potential travel demand over the next five years for transit in the San Diego region, including population and employment growth, major activity centers, travel patterns, and changing demographics.
- Chapter 4 provides a description of the existing transit services in the region and identifies challenges and opportunities facing transit provision in the region.
- Chapter 5 presents the goals and objectives to guide transit planning and development for the next five years, and evaluates the region's transit system in meeting those goals and objectives.
- Chapter 6 identifies the unmet transit needs in the region and the FY 2006 service proposals (and funding status) to address these needs.

#### Plan Development

In accordance with the roles and responsibilities resulting from agency consolidation, SANDAG establishes the goals and objectives for the RSRTP and transit system, sets parameters for new and revised transit services, and ensures consistency of transit service changes with regional policies, goals, and objectives. The goals and objectives for this year's RSRTP, developed in collaboration with the transit agencies, were

endorsed by the SANDAG Transportation Committee in December 2004 and are included in Attachment B. The goals and objectives address:

- Regional Transit System Development
- System Productivity
- Capital Investments
- Network Connectivity
- Travel Demand
- Customer Experience
- Smart Growth
- Financial Sustainability

These goals and objectives, along with the identified needs and deficiencies from the RSRTP (discussed on pages 54-56 of Attachment A), guide the development of the service proposals put forth by MTS, NCTD, and SANDAG for consideration. The service proposals comprise the "Regional Service Implementation Plan" in the RSRTP (Table 6.5 of Attachment A). Attachment C provides a table from the RSRTP that summarizes how well the FY 2006 service proposals address regional goals and objectives. Implementation of services from the Regional Service Implementation Plan would be accomplished in accordance with the roles, responsibilities, and processes defined in SANDAG Policy No. 18: Regional Transit Service Planning and Implementation.

#### FY 2006 Regional Service Implementation Plan

Unfortunately, as has been the case for the last several years, few additional funds are expected to be available for transit services in FY 2006. The transit agencies will receive regional operating funds in the same proportion as in the past. As a result, this year no regional priorities for the service proposals have been established since implementation is dependent on each transit agency's ability to implement the services within available funding levels. The MTS service proposals focus on fine-tuning the system and restructuring services for the opening of the Mission Valley East light rail extension this summer (which is projected to result in bus-operating subsidy savings). Service proposals for the MTS area identified in Table 6.3 of the Draft FY 2005-2009 RSRTP (Attachment A) include:

- Mission Valley East connectors
- Frequency improvements
- New service in San Ysidro/Otay Mesa

More substantial changes are anticipated for next year's RSRTP as the recommendations of the MTS Comprehensive Operations Analysis (COA) are programmed for implementation.

#### Review Process and Schedule

Over the next month, the draft plan will be available for public review. Comments provided by MTS staff have been incorporated (Attachment D) into the Draft RSRTP. A public hearing on the draft plan is scheduled at the SANDAG Transportation Committee meeting on April 15, 2005, with preparation of the Final FY 2005-2009 RSRTP completed by the end of April 2005.

Paul C. Jablonski Chief Executive Officer

Key Staff Contact: Toni Bates, 619.699.6950, tba@sandag.org

JGarde MAR24-05.31.TBATES 3/7/05

Attachments: A. Draft FY 2006 Regional Service Implementation Plan

B. Transit Service Goals and Objectives

C. Service Proposal Performance in Advancing the RSRTP Goals and Objectives

D. MTS Comments

# Regional Transit Service Goals and Objectives

GOAL	OBJECTIVES
Regional Transit System Development – Transit service should strive to address needs and deficiencies in the regional transit system.	Eliminate one or more transit deficiencies identified in the FY 2005-2009 RSRTP and/or individual transit agency performance goals.
System Productivity – Transit service should strive to improve system productivity.	<ul> <li>Reduce duplication of services; i.e., routes, schedules.</li> <li>For new and enhanced services, at least meet minimum productivity standards (to be defined through the RSRTP service evaluation process) for similar types of services.</li> <li>Optimize the amount of service provided within available funding.</li> <li>Improve operational efficiency though the Productivity Improvement Program and related efforts.</li> <li>Facilitate and promote strategies to provide priority for transit operation on streets and highways.</li> <li>When required by funding constraints, develop service reductions that minimize impacts to current passengers, maintain service throughout the region where demand is demonstrated, and maintain network connectivity to the extent possible.</li> </ul>
Capital Investments – Transit service should support major transit capital facilities and investments.	<ul> <li>Provide high levels of transit service to regional transit centers and regional transit services; i.e., rail and bus rapid transit services, in concert with local transit service needs.</li> </ul>
Network Connectivity – Transit service should maximize network connectivity.	<ul> <li>Maintain and enhance timed transfers at high-volume transfer locations as demand warrants, particularly to regional services and at transit centers.</li> <li>Support local and regional travel demand through provision of transit services unconstrained by jurisdictional boundaries.</li> </ul>
Travel Demand – Transit service should meet travel demands.	<ul> <li>Provide appropriate levels of transit service (frequency and span) to sufficiently accommodate demand.</li> <li>In general, provide higher frequencies during periods of greater demand.</li> <li>Plan transit service improvements and revisions with input from riders, the public, and the community.</li> </ul>
Customer Experience – Transit service should provide a positive customer experience.	<ul> <li>Provide transit service routing that is as direct as possible; i.e., avoid out-of-direction travel while balancing directness with access.</li> <li>Provide as fast and reliable a transit service as possible.</li> </ul>
Smart Growth – Transit service should support Smart Growth areas.	<ul> <li>Take advantage of opportunities presented by existing and planned Smart Growth developments when adding or revising transit services, as appropriate and feasible.</li> </ul>
Financially Sustainable Plan – Transit operating expenditures should be sustainable over time.	<ul> <li>The annual budget should be balanced and rely on available funding without dipping into reserves or depending on nonrecurring sources of revenue.</li> <li>Service levels and operating expenses should match available revenue.</li> <li>New ongoing operating revenue streams should be put in place.</li> </ul>

# SERVICE PROPOSAL PERFORMANCE IN ADVANCING RSRTP GOALS AND OBJECTIVES

Proposed Service Change	Regional Transit System Development	System Productivity	Capital Investments	Network Connectivity	Travel Demand	Customer Experience	Smart Growth	Financial Stability
MTS		, -	<del></del>					·
Mission Valley East Connectors	•	•	•	•	•	•	•	•
Frequency Improvements	•	•		•	•	•		
New Service in San Ysidro/ Otay Mesa	•	•	•	•	•			

1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 (619) 231-1466 • FAX (619) 234-3407

#### MEMORANDUM

DATE:

March 1, 2005

SRTP 810 (PC 20271)

TO:

Toni Bates, SANDAG

Dennis Wahl, IBI Group

FROM:

Conan Cheung, Director of Planning and Performance Monitoring

SUBJECT: COMMENTS ON DRAFT FISCAL YEAR 2005-2009 REGIONAL SHORT RANGE

TRANSIT PLAN

Thank you for the opportunity to review the draft fiscal year (FY) 2005-2009 Regional Short Range Transit Plan (RSRTP). Below are our comments as discussed this morning. If you have any questions or comments, please contact me at 619.515.0933 to discuss.

# Table 5.1 - Transit Service Goals and Objectives

- Under goal of System Productivity, suggest change to "For new and revised services, at least meet minimum productivity standards (to be defined through the RSRTP service evaluation process) for similar types of services."
- Under goal of Network Connectivity, suggest change to "Maintain and enhance timed transfers when and where appropriate at high-volume transfer locations, particularly to regional services and at transit centers."
- Under goal of Travel Demand, suggest change to "In general, provide higher frequencies during peak travel periods of greater demand.

# Page 54-55 - Section on MTS Area Service Gaps

- Move Carmel Valley Service to a new section titled "Regional Service Gaps."
- Change bullet titled "University Avenue Mobility Plan Restructuring" to "Current Service Planning Studies" and incorporate the University Avenue study along with the Comprehensive Operational Analysis (COA) and Mid-City Network Plan into the write-up on identification of service gaps.



#### Page 55-56 – Section on Service Deficiencies

Under Maintain and Improve Transfer Opportunities, suggest change of last sentence of last paragraph to "Since the RTV is developed around a concept of interconnected services, it is important that timed transfer opportunities are maintained and improved where transfer demand exceeds through riders, except in cases where frequencies are greater than 15 minutes. at major regional transfer locations, including transit centers in El Cajon, Escondido, Euclid, Fashion Valley, Grossmont Center, H Street, Oceanside, Old Town, and University Towne Centre.

#### Page 56-57 - Section on FY 2006 Regional Service Implementation Plan

 Move the last paragraph of the section to the new section titled "Regional Service Gaps" as suggested above, and suggest change to "A key service issue to be resolved is the provision of transit service in Carmel Valley. SANDAG, MTS, and NCTD The region will continue their joint efforts in FY 2006 to provide cost-effective service in this growing area."

#### Page 58 - Table 6.4 Service Change Consistency with RSRTP Goals and Objectives

- For Mission Valley East Connectors, add "Customer Experience" as a benefit.
- For **New Service in San Ysidro/Otay Mesa**, add "System Productivity" and Network Connectivity" as benefits.

#### Page 62 - Section on Outlook for FY 2006 - A Focus on Efficiency

• Under Service Reductions and Operational Efficiencies, take out sub-bullets detailing guidelines on how to develop service reductions. Suggest making a general statement such as "Service reductions should seek to minimize impacts on existing riders."

cc: Paul Jablonski, MTS

SChamp/Planning M-COMMENTS.RSRTP.05-09.CCHEUNG

# DRAFT FY 2005-2009 REGIONAL SHORT-RANGE TRANSIT PLAN

March 4, 2005



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As of February 5, 2005

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#### **CHAPTER 1: INTRODUCTION**

With its warm weather and superb quality of life, San Diego County has become one of the most attractive and fastest growing regions in the country. Over one million new people and half a million new jobs are anticipated over the next 30 years. With this growth come the byproducts of a healthy economy. Unchecked, streets and freeways will become more congested, commute times will increase, and people will be traveling longer distances.

MOBILITY 2030, San Diego's blueprint for its transportation system, envisions a truly multimodal transportation network that will support our future mobility needs. With a heavy emphasis on developing a world-class transit system to support "smart growth" communities with higher-density and mixed-use development, nearly one half of the region's transportation investments over the life of the *TransNet Extension* ordinance will help fund projects that improve or support the regional transit system.

While it is important to develop new transit services to support the region's growth, it is equally important to maintain and optimize the existing system to address current travel demands, improve the quality of service for our existing riders, and enhance its appeal to new rider markets. In this era of fiscal constraints and increasing operating costs, we are faced with hard decisions on how best to balance the vision of transit in the future with the fiscal and operational reality of today.

#### WHAT IS THE REGIONAL SHORT-RANGE TRANSIT PLAN?

The Regional Short-Range Transit Plan (RSRTP) proposes how the region should balance the short-term needs of maintaining and optimizing existing services, while beginning to implement the long-term transit vision identified in MOBILITY 2030. As such, the RSRTP provides a framework for transit system development over the next five years. Previously, North San Diego County Transit Development Board (NCTD) and the Metropolitan Transit Development Board (MTDB) prepared separate SRTPs for their respective jurisdictions. As a result of Senate Bill 1703 (Peace), the San Diego Association of Governments (SANDAG) has assumed the transit planning oversight and programming and construction responsibilities for the region, including the preparation of a consolidated RSRTP. The FY 2005-2009 RSRTP provides the framework and guidelines for consolidated transit planning throughout the region, reflecting the goals and direction for transit service development as described in MOBILITY 2030.

The RSRTP serves six primary purposes:

- 1. It establishes regional guidelines for short-range transit improvements and adjustments within the context of the Regional Transportation Plan and Regional Transit Vision;
- 2. It defines the goals and objectives for transit service and capital development;
- 3. It provides an evaluation of current and future travel demand, the existing transit system, and identifies deficiencies and gaps in service;
- 4. It prioritizes operating expenditures to maintain and improve the regional transit system;
- 5. It supports SANDAG's Capital Improvement Program (CIP), as well as state and federal grant applications; and

6. It coordinates with and guides the Transportation Development Act (TDA) claims approval process and the MTS and NCTD budget development processes.

#### WHERE DOES THE RSRTP FIT IN THE REGIONAL PLANNING PROCESS?

As the metropolitan planning organization (MPO) and regional transportation planning agency (RTPA), SANDAG is responsible for developing long-range strategic plans, including the Regional Comprehensive Plan (RCP) and the Regional Transportation Plan (RTP). As the region's vision for growth, the RCP focuses on addressing and balancing the interconnected issues of achieving more walkable and mixed-use communities, greater housing supply and affordable housing, a healthy ecosystem, a prosperous economy, better coordination on borders issues, and greater transportation choices to reduce the dependence on automobiles.

To support this vision, SANDAG's RTP, MOBILITY 2030, provides a blueprint for the development and management of a multimodal transportation system over the next 30 years. As the transportation component of the RCP, MOBILITY 2030 provides the foundation for better land use coordination, system management, demand management, and multimodal system development. The plan includes a five-year, \$25 million Smart Growth incentive program to foster the integration of smart growth land uses and transportation facilities, acknowledging the need for better land use and transportation coordination to more efficiently and effectively serve the region's communities and businesses. System management through the use of high-occupancy toll (HOT) lanes, advanced technology, and programs such as the Freeway Service Patrol (roving tow trucks aimed at easing congestion by removing disabled vehicles from freeways during rush hours) will maximize the efficiency of the transportation infrastructure. RideLink, the region's transportation demand management program, and the Congestion Management Program will be used to manage travel demand during peak hours.

Finally, MOBILITY 2030 outlines an investment strategy that balances the development of automobile and transit infrastructure for a truly multimodal transportation system. Nearly one half of the transportation investments identified in the plan are focused on improving and supporting the region's transit system, including the development of a network of high-occupancy-vehicle (HOV) lanes, managed lanes (lanes for carpools, buses, and paying single-occupant automobiles), several high-speed and reliable transit services to connect San Diegans to major employment and activity centers, and advanced technology that enhances the travel experience for riders. MOBILITY 2030 is based on a reasonably-expected revenue scenario, which includes the extension of the region's half-cent sales tax for transportation projects through 2048 (confirmed by the passage of the *TransNet Extension* in November 2004), and other public funding is increased based on historical trends. The RTP also includes a revenue-constrained and unconstrained scenario.

The RSRTP supports the vision of MOBILITY 2030 by providing guidelines, goals, and a short-term (five years) plan for transit system adjustments and enhancements. As a revenue-constrained plan, the RSRTP identifies and establishes priorities for specific service, operational, and capital improvements that balance the goals of maintaining a productive and cost effective transit system with implementing enhancements envisioned in MOBILITY 2030. These improvements are then forwarded to the annual budget process for adoption. The short-term nature of the RSRTP allows SANDAG the opportunity to annually adjust these investment priorities between maintenance and enhancements based on system monitoring, available funding, and operational constraints.

#### ABOUT THIS RSRTP

The contents of this RSRTP are organized into the following six chapters:

- Chapter 1 provides an introduction to the RSRTP, and describes the role of the RSRTP in the regional planning process.
- Chapter 2 presents SANDAG's strategic vision for the future of transit in San Diego, and describes
  the processes and guidelines governing transit service planning and development in the region,
  including guidelines for short-range service development.
- Chapter 3 describes the existing and potential travel demand for transit in San Diego, including
  population and employment growth, major activity centers, travel patterns, and changing
  demographics.
- Chapter 4 provides a description of the existing transit services in the region, and identifies challenges and opportunities facing transit provision in the region.
- Chapter 5 presents the goals and objectives guiding transit planning and development for the next five years, and evaluates the region's transit system in meeting them.
- Chapter 6 identifies the unmet transit needs in the region and the FY 2006 service adjustments identified to address these gaps and deficiencies.

In addition to this document, a complementary Technical Appendix presents the following:

- History of SANDAG, MTDB, NCTD, and MTS (Appendix A);
- Inventory of the existing transit system, including services, rolling stock, and capital facilities (Appendix B);
- FY 2005 Transportation Development Act (TDA) Performance Improvement Recommendations (Appendix C);
- FY 2004 operating statistics by route (Appendix D);
- Historical operating statistics by transit operator (Appendix E);
- Title VI assessment (Appendix F);
- MTS and NCTD Service Improvement Details (Appendix G).

#### PUBLIC INFORMATION AND OUTREACH

Information on the RSRTP, MOBILITY 2030, RCP, and other SANDAG programs is available at <a href="https://www.sandag.org">www.sandag.org</a>. Outreach efforts for the RSRTP will be consistent with SANDAG Policy No. 25, Public Participation/Involvement Policy. This policy covers the public participation and public information efforts in development planning, design and construction, transit service, and fare changes. Applicable applications for the RSRTP include outreach efforts, the use of press releases, Web site updates, and opportunities to address the SANDAG Board of Directors.

#### **CHAPTER 2: GUIDING PRINCIPLES**

#### **REGIONAL TRANSIT VISION**

Although more than 320,000 daily trips are made on the region's bus, trolley, and rail services, transit trips account for approximately 3 percent of all the region's trips. However, close to 20 percent of peak-period trips to downtown San Diego are made by transit and approximately 16 percent of trips in the downtown to International Border corridor are on transit, indicating that in areas where a high level of transit service is provided, transit can accommodate a significant portion of travel demand. Still, with a relatively short duration of peak-period congestion, ample parking, limited or no transit service to developing parts of the region, and an automobile-oriented land use pattern, there is little doubt as to why the majority of trips are made by single-occupant vehicles. In fact, the most recent survey of transit riders indicates that the majority of regular riders use transit because they have no other travel alternative. But, when transit is competitive with the auto and/or meets traveler needs, a higher percent take transit. For example, nearly 90 percent of the riders on the 800-series commuter express routes (traveling on the I-15 HOV lane) have an auto available for their travel, and for the Coaster the figure is over 80 percent. In addition, the COASTER provides the equivalent of an extra lane on I-5 at peak times, thereby enhancing transportation capacity in the corridor.

With the significant population growth projected over the next 30 years, public transportation will need to play an increased role in serving San Diego's mobility needs. As the region grows, so will the demand on its land use and transportation infrastructure. In some instances, people will be living further and further away from their jobs. As the length and duration of their commutes increase, so will the geographic extent and duration of congestion. In other cases, urban villages will be developed that will promote walking, biking, and transit for commute as well as non-commute trips. To effectively address the increased congestion and travel demand from this growth, the region must focus appropriate levels of investment towards enhancing and expanding the transit system consistent with travel demand and in a way to entice new traveler markets to transit.

The SANDAG Board adopted the Regional Transit Vision (RTV) in late 2001, which was incorporated into the Mobility 2030 Regional Transportation Plan in April 2003, to help guide the future development of transit in the San Diego region. The RTV was developed as a collaborative effort between SANDAG, MTDB, NCTD, Caltrans, local jurisdictions, and a 50-member Citizens Advisory Committee for Transportation. In addition, extensive market research was conducted throughout the region to learn more about the attitudes and preferences that influence San Diegans' daily travel choices. This research identified three primary service qualities important to residents: (1) speed and flexibility, (2) travel experience, and (3) personal safety.

#### Service Concept

Based on input from partner agencies and the public, SANDAG developed the RTV as a network of fast, flexible, reliable, safe, and convenient transit services that link residential areas with major employment and activity centers. This network is comprised of four service concepts: neighborhood, local, corridor, and regional. A description of each concept follows (see Figure 2.1).

#### **Neighborhood Services**

This service type is designed to facilitate community-level trip making and would provide neighborhood circulation, feeder access to medium- and long-distance services, and/or specialized service (e.g., for senior citizens unable to drive). Neighborhood services would likely use vehicles that are smaller than traditional buses, and have an average stop spacing of 1/4 mile.

#### **Local Services**

This service type will serve local trip needs, resulting in lower travel speeds (10 to 15 mph) and more frequent stops (1/4 to 3/8 mile average spacing). These services are designed as the basic mobility network for the region. Most of the existing bus system operates as this type of service.

#### **Corridor Services**

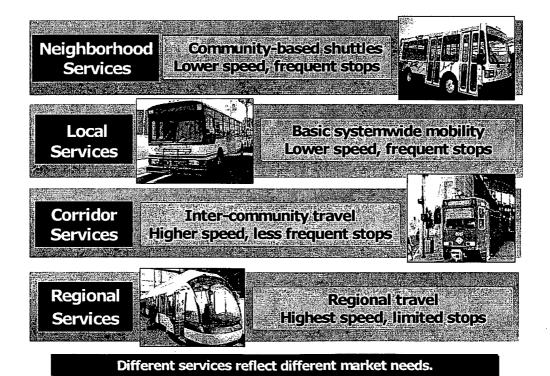
This service type focuses on facilitating medium-distance trip making. This service maintains relatively high average speeds (20 to 25 mph) and operates with limited stops (3/4 to 1 mile average spacing) primarily on major arterials. Corridor services will serve as the spine of the regional transit system.

#### Regional Services

Given that many trips in the region are longer distance, this service type maintains high average speeds (35 to 40 mph) and operates with very limited stops (more than three miles between stops, on average) on freeways and major arterials. Regional services will operate as the primary transit in corridors where longer station spacing is justified based on longer-distance travel patterns (e.g., I-15 corridor), or as an overlay for corridor services where a faster, more limited-stop service is justified to handle high-volume, long-distance trip needs. These routes would focus on serving key employment sites and major trip attractions.

Together, these four service concepts can provide a system of public transportation that meets the distinct travel needs of the region's various travel markets.

Figure 2.1 Regional Transit Vision Service Concepts



#### Factors Influencing the Future of Transit

The success of the RTV in relieving congestion and preserving our quality of life hinges on the region's success in pursuing the following four complementary efforts.

#### Capital and Operations Funding

Both capital and sustainable operating funds will be required to realize the optimum network of transit services envisioned under the RTV. Transit infrastructure, including vehicles, right-of-way, guideways, stops and stations, transit centers, maintenance yards, and storage facilities, require capital investment. In addition, capital funding is needed to maintain and replace past investments in transit infrastructure as the existing system ages. The level of capital funding secured will be a prime determinant of how much transit can grow. The second part of the funding picture involves funding for transit service operations. Virtually all transit services in the U.S. require funding subsidies to provide day-to-day services. Significant increases in ongoing local funding for operations will be required to support any major increase in the level and quality of transit service provided in the region. A 40-year extension of the local *TransNet* sales tax was approved by San Diego County voters in November 2004. This program will provide both capital and operations funding for numerous Bus Rapid Transit (BRT) services and the Mid-Coast LRT line. It also includes some growth in operating funds to support the existing transit services.

#### **Land Use Coordination**

The success of any transit service is linked to regional and local land use patterns. Low-density development, big box retail, and auto-oriented urban design (e.g., narrow sidewalks, wide intersections, limited pedestrian facilities and lack of human scale) decrease the attractiveness and effectiveness of transit. For the RTV to be successful, SANDAG and the region's local jurisdictions must be committed to focusing higher-intensity development along major travel corridors, in established urban areas, and near major transit centers. In addition, the region will need to focus on improving the pedestrian orientation and urban design of our communities to facilitate access to and from transit facilities. This should also include the siting of public facilities such as schools and hospitals which will need to involve other governments' agencies such as school districts and hospital districts. Through the strategic initiatives included in the RCP, SANDAG is establishing policies, programs and activities to work in partnership with local jurisdictions to better coordinate transit and land use planning. These include participation agreements between SANDAG and local governments, an intergovernmental review process for long-range plans, development regulations, and development projects. SANDAG will also proactively solicit involvement in the preparation of regional plans and forecasts, and the identification of smart growth areas.

#### Transit Priority Measures

As traffic congestion increases throughout the region, transit priority measures (e.g., HOV or managed lanes on freeways, transit-only lanes, queue jumpers at intersections, and signal priority measures on arterial streets) will become increasingly important for providing fast, reliable, and cost-effective transit service. Priority measures will allow transit services to travel faster than automobiles through congested corridors, while the faster and more reliable travel times will allow transit operators to provide dependable and efficient services. SANDAG will work with local jurisdictions and transit agencies to develop demonstration projects to showcase the travel benefit of transit priority. For example, SANDAG and the transit agencies will be undertaking projects in North University City and Escondido to examine the feasibility of traffic signal priority.

#### Advanced Technology

Advances in technology should be employed to enhance the passenger's travel experience and to promote the efficient operation of service. Advanced design vehicles and "smart fare card" technology will allow for easier and speedier boarding and alighting. Real-time transit vehicle arrival information will provide reassurance to waiting passengers and promote a more relaxed waiting environment. SANDAG

currently has programs underway to deploy both the smart card fare system and the real-time vehicle information.

Together, these transit supportive efforts will result in increased ridership through better quality of service, and will improve operational efficiency.

#### SERVICE DEVELOPMENT GUIDELINES

SANDAG Policy No. 18, Regional Transit Service Planning, was adopted in September 2004 and specifies the transit service planning responsibilities of the consolidated agency and the transit agencies, and outlines a framework for transit service planning. The policy allows the transit system to quickly and efficiently respond to changes in travel demand and operating/fiscal environment, while ensuring that the system is adjusted and developed consistent with longer-range regional transportation and land use goals as incorporated into the RCP, the RTP, and the RSRTP. As a result, transit service revisions that relate directly to implementation of regional goals (regionally significant service changes) are generally those that:

- Support regional travel demand corridors that cross transit agency jurisdictional boundaries;
- Support inter-jurisdictional trip making (i.e., are consistent with the guidelines contained in the RSRTP; for example, would support and enhance geographic connections, provide timed transfers, and maintain or expand the frequency/service span of such services); and
- Can be implemented within the transit agency's adopted budget or with new available operating resources.

SANDAG will ensure that all proposed service and operational changes comply with the policy. Any non-compliance will be resolved prior to the implementation of the change.

#### REGIONAL SHORT-RANGE PLANNING PROCESS

The short-range planning process outlined in SANDAG Policy No. 18 provides a framework for systematically adjusting services to meet changes in travel demand and operating constraints, while promoting service enhancements to attract new market segments. This process is based on collaborative planning principles that promote customer and stakeholder involvement from inception through implementation. In addition, quantitative methods are employed to ensure consistency and objectivity in service development and evaluation. SANDAG's short-range planning process consists of five primary functions:

- Providing Guidance and Establishing Goals and Objectives
- Developing Service Adjustments
- Evaluating and Prioritizing New and Revised Service Changes
- Implementing New and Revised Services
- Monitoring

Each of these functions is described in detail below.

#### Guidance

The RSRTP, consistent with SANDAG's RTP and RCP, is drafted annually by SANDAG, in consultation with the transit agencies. The RSRTP provides the framework, guidance, goals, and objectives for service planning during the upcoming year and balances the immediate needs of optimizing the transit system in response to operational and financial constraints, with the mid-/long-range system development goals established in the long-range plans.

#### **Develop Service Adjustments**

Service changes and new services are planned and developed to address deficiencies and gaps in the existing system, accommodate changes in travel demand, attract new riders, optimize existing services, reflect changes to the operating and fiscal environment, respond to customer comments and requests, and begin to implement and support services envisioned in the long-range plans. Planning studies and analyses are initiated as a result of system monitoring, public comments, regional goals and funding priorities, fiscal constraints, and forecasted growth throughout the region. Planning studies range from minor route analyses to subregional service restructuring and major corridor studies and are conducted by both the transit agencies and SANDAG. Regardless of the magnitude of analysis, all studies include a definition of goals, identification of the issue or deficiency to be addressed, and a prioritized list of recommended service improvements and adjustments. Stakeholder advisory committees and community groups provide input throughout the planning process to ensure that all issues are addressed, and to assist in the development of recommendations. In addition, final recommendations are presented to the transit agencies and SANDAG for adoption. The transit service planning process, including the public hearing process and role of the transit agencies and SANDAG, is described in detail in SANDAG Policy No. 18, Regional Transit Service Planning (included in Appendix G).

SANDAG's focus in planning transit system and service changes is on establishing a policy framework, including development of regional goals and objectives, developing and evaluating service proposals within that framework, ensuring consistency of transit service proposals and changes with regional goals and objectives, and approving transit agency operating budgets for funding. At the direction of the Transportation Committee, revisions to Policy No. 18: Regional Transit Service Planning, were adopted in March 2005 affecting the service planning roles and responsibilities for SANDAG and the transit agencies. The Policy No. 18 revisions transferred the responsibility for service change public hearings to the transit agencies. Prior to a public hearing, SANDAG will conduct an administrative review of major and regionally significant service changes to determine that the service proposals are consistent with regional policies, goals, and objectives, or to make a finding of overriding considerations if the proposals are inconsistent with regional policies. The checklist in Table 2.1 provides guidance for evaluating consistency. Transit agencies will advise SANDAG of local or minor service changes prior to implementation. Transit system and service planning issues will be brought to the SANDAG Transportation Committee for discussion and direction, if appropriate.

Every year, service proposals are consolidated into a regional Service Implementation Plan and evaluated to establish priorities based on regional goals and funding availability. Service proposals must be funded through the transit agencies' budgets prior to implementation, as described in the next section.

**Table 2.1 Regional Consistency Checklist** 

Criteria	YES	NO
Requires Unbudgeted Operating Subsidy or Funding Reallocation		
Addresses a Known Gap or Deficiency		
Positive Effect on Network Connectivity		
Meets Performance Standards		
Positive Effect on Major Capital Facility (e.g., Transit Center or Rail Line)		
Advance & Support Smart Growth		
Consistent w/SANDAG Plans & Policies		<u></u>

#### **Evaluation and Approval**

Once the regional Service Implementation Plan is developed by SANDAG and the region's transit agencies, it is considered for implementation during the annual budget development process. This process begins in January each year, and concludes six months later when the SANDAG Board approves the transit agencies' budgets for funding for the upcoming fiscal year. During this budget process, service enhancements identified in the regional service improvement plan are considered for implementation based on the priorities identified through the RSRTP planning process and funding availability. The Service Implementation Plan is adopted by SANDAG as part of the RSRTP.

This year projected operating revenues are unlikely to be sufficient to support increases in service. In fact, ongoing operating budget deficits may result in reductions in services to balance operating budgets. The SANDAG Board may evaluate the use of non-recurring revenues (e.g., one-time capital funds and reserves), fare increases, and/or service reductions proposed by the transit agencies to balance the transit operating budgets. MTS is conducting a Comprehensive Operational Analysis (COA) in FY 2005 to restructure services to be more efficient, reduce operating subsidy requirements, and establish a financially sustainable level of service. The service change proposals resulting from the COA will be considered by SANDAG over the next several years. Any budget-balancing actions would be considered with the goals of minimizing impact to existing riders, maintaining lifeline levels of service throughout the region, and maintaining network connectivity. A public hearing will be held at the transit agencies prior to the adoption of any major service reduction to provide a forum for the public to comment on the proposed service changes.

#### Implementation

Service changes, whether improvements or reductions, are implemented during one of three regularly scheduled service changes each year, held in the fall, winter, and spring. Transit operators are responsible for implementation, which may include installing or removing stops, ensuring vehicles are available, scheduling, driver bidding, developing maps and timetables, and marketing. Transit operators are also responsible for notifying the public of service changes, usually in the form of written notification provided aboard vehicles or within ride guides.

#### Monitoring

SANDAG and the region's transit agencies and operators continuously monitor the transit system to ensure that services meet the travel needs of the public, quality of service is maintained and improved, and service is provided cost-effectively. The transit agencies and individual operators focus on the day-to-day operations of their specific routes, and monitor the impacts of the current operating environment on the performance of their services. Impacts may include delays due to traffic congestion, detours resulting from construction, as well as heavy passenger loads due to school bell times, summer tourist travel, and military presence. Ongoing and annual route evaluations provide the transit agencies and operators with an in-depth understanding of the performance of each route, and include recommendations for improving under-performing routes and enhancing higher-performing routes. In addition, operators evaluate the cost impact and cost-effectiveness of their operation through monthly and quarterly budget monitoring reports, which compare budgeted expenses to actual costs. Data sources for operator monitoring include customer, driver, and supervisor comments, trips and route level passenger counts, and a series of reports detailing operating statistics such as revenue miles and hours, schedule reliability, road calls and missed trips, overtime hours employed, fuel and maintenance costs, and fare revenue.

While operators focus on their specific operations, SANDAG monitors transit service and operations on a transit agency and systemwide level. SANDAG undertakes two performance monitoring programs to systematically evaluate transit agency and systemwide performance: a quarterly report on transit agency performance and operating trends, and the annual Performance Improvement Program (PIP). The quarterly report provides an evaluation of the changes in transit agency and operator-level performance and efficiency, including reasons for upward or downward trends. Through the PIP, SANDAG evaluates each transit agency's and operator's efforts towards meeting performance targets and implementing annual operational improvements agreed upon by SANDAG and the agency/operator to improve the efficiency and effectiveness of the transit system in line with the goals and objectives of the RSRTP and RTP. A detailed description of each performance monitoring program is presented in Chapter 5.

In addition to these formal monitoring programs, the transit agencies and operators receive and respond to comments from the public on transit services and service changes. Each comment is investigated and, if appropriate and feasible, service changes are made to address the comment or kept for future consideration. The transit agencies share these comments and responses with SANDAG for future transit system assessments and updates to the RSRTP.

#### RELATIONSHIP WITH PARTNER AGENCIES

Interagency coordination is essential for SANDAG to successfully fulfill its roles and responsibilities for guiding, planning, funding, and monitoring improvements to transit services and facilities. Coordination with partner agencies ensures that SANDAG's programs, services, and facilities complement and are consistent with other local, regional, and state efforts. This collaboration also helps SANDAG to better understand and address concerns expressed by partner agencies and key stakeholders, resulting in greater cooperation and support for SANDAG efforts. Most interagency relationships are maintained at the local and state levels, as described below. In addition, SANDAG coordinates with federal agencies for conformance and funding.

#### Local Level Coordination

#### **Transit Agencies**

SANDAG sets policy for service planning and fare setting for the region's transit agencies and operators. SANDAG coordinates the various implementation efforts of the region's transit agencies to ensure that seamless and unified service is provided to the public. This coordination is achieved through cooperative agreements such as the Comprehensive Fare Ordinance, coordinating committees comprised of SANDAG and operator staff such as the Regional Transit Management Committee and committees established for specific planning and project purposes. In addition, transit agencies are involved in various aspects of SANDAG planning, engineering, and finance activities.

#### **Local Jurisdictions**

To ensure consistency with local jurisdiction plans and programs, SANDAG coordinates its transit service planning activities with the 18 cities in the County and the County of San Diego. In addition, the City of San Diego provides two staff members to serve as planning and engineering liaisons between SANDAG and the City of San Diego. SANDAG policies and programs promote pedestrian and transit-oriented development through long-range plans, memorandums of understanding (MOUs), development project review, zoning and street design manual updates, right-of-way protection and acquisition, fund programming, education, and outreach.

#### State Level Coordination

#### Caltrans

Caltrans is responsible for transportation planning, engineering, and construction of state facilities. To enhance coordination, Caltrans provides SANDAG with an engineering liaison located at SANDAG. Caltrans also maintains oversight responsibilities for various state and federal funding programs. SANDAG enjoys a cooperative partnership with Caltrans District 11, particularly on large construction projects, including the I-15 Managed Lanes/BRT Project and the Mission Valley East LRT extension. This year, in collaboration with SANDAG, Caltrans is conducting a demonstration project on segments of Interstate 805 and SR 52 to convert freeway shoulder lanes to transit-only lanes.

#### **Coordinating Committees**

Interagency coordination is established and maintained through ad hoc and standing committees at both the staff and Board levels. Table 2.2 provides a list of committees through which SANDAG coordinates its activities.

#### Table 2.2 Summary of SANDAG Service Planning Coordinating Committees

Board of Directors (BOD) – The Board of Directors is the governing body responsible for establishing all of the agency's policies and programs. The Directors are elected officials—either a mayor, councilmember, or supervisor from each of the region's 18 incorporated cities and the county. Voting is based upon membership and the population of each jurisdiction, providing for a more accountable and equitable representation of the region's residents. Representatives from Imperial County, Caltrans, the U.S. Department of Defense, the San Diego Unified Port District, the San Diego County Water Authority, MTS, NCTD, and a representative from the Republic of Mexico serve on the Board as non-voting, advisory members.

Transportation Committee (TC) – The nine-member Transportation Committee has delegated authority from the SANDAG Board of Directors to act and advise on major policy-level matters related to transportation. Committee members provide oversight and approval for the consolidated transportation responsibilities, including transportation infrastructure projects, transportation and transit plans, transportation project priorities, Transportation Development Act claims and amendments to regional and state transportation improvement programs, and transit operator budgets. The committee consists of Board members or alternates representing North County Coastal, North County Inland, East County, South County, the City of San Diego, a supervisor from the County of San Diego, plus one member each from the Boards of MTS and NCTD, and the San Diego County Regional Airport Authority. There is also one advisory member representing Caltrans.

Regional Transit Management Committee (RTMC) – Provides management level coordination among SANDAG and the transit agencies on issues related to transit service planning, policies and major transit developments for the San Diego region; deals with broad issues related to financing, legislation, planning, and Americans with Disabilities Act (ADA) service issues; composed of general managers and senior staff from both MTS and NCTD, and the fixed-route transit operators in the MTS area; meets once a month.

<u>Joint Committee on Regional Transit (JCRT)</u> – Consists of three board members each from MTS and NCTD, who meet periodically to discuss ways of better integrating the two transit systems and act as the advisory committee on regional consolidation. A member of the SANDAG Transportation Committee participates as a non-voting member.

<u>Technical Working Groups</u> – Committees comprised of operators, jurisdictions, and other stakeholders developed for specific planning studies to review deliverables, and provide input and directions for work.

<u>Regional Short-Range Transit Plan Working Group</u> – Coordinates on development of the annual RSRTP including the Service Implementation Plan.

<u>Subcommittee on Accessible Transportation (SCAT)</u> – Administered by SANDAG; makes recommendations on regional accessible transit operational issues; meets quarterly; membership consists of representatives from the region's transit operators, senior and disabled persons, and the public and nonprofit agencies serving them.

<u>Accessible Services Advisory Committee (ASAC)</u> – Monitors accessibility in operations and service procedures and makes recommendations on implementation of Complementary Paratransit Plan; comprised of operators, social service agencies, and consumers; meets six to eight times per year.

<u>Bicycle-Pedestrian Advisory Working Group</u> – Administered by SANDAG, this group advises on facility improvements related to bike and pedestrian uses.

#### **RELATIONSHIP WITH THE PUBLIC**

To better serve the travel demands of the San Diego region, SANDAG encourages public participation at all levels of transit planning, development, and implementation. On November 19, 2004, SANDAG adopted Policy No. 25, Public Participation/Involvement Policy Outreach. This policy covers the public participation and public information efforts in development planning, design and construction, transit service, and fare changes. It includes discussion of the overall public participation process and Native American consultation. Applications for the RSRTP include reports to the Transportation Committee with opportunities for the public to address the Transportation Committee, Web site updates, and a public hearing on the plan at the Transportation Committee.

Consistent with Policy No. 25, SANDAG's Public Participation/Involvement Program informs and involves citizens in various agency programs, projects, and work activities. Since this program also assists in identifying and resolving environmental justice and social equity issues, special outreach is provided to lower income households, minorities, persons with disabilities, representatives from community and service organizations, tribal councils, and other public agencies. Citizen participation objectives include involvement of interested citizens, stakeholders, and representatives of community organizations in agency work through timely workshops on topical issues, fully noticed public hearings, and ongoing broad citizen/organization involvement in the planning and decision processes.

Prior to a public hearing on proposed transit service changes at the transit agencies, SANDAG will determine that the service proposals are consistent with regional policies, goals, and objectives, or make a finding of overriding considerations if the proposals are inconsistent with regional policies. Following this action, the transit operators hold a public hearing as part of their Board meetings to solicit public comment on proposed service changes.

Board members and staff regularly make presentations to various leadership, civic, and community groups about transportation issues and solutions. Board members and staff proactively provide information to the general public through Web sites (<a href="www.sandag.org">www.sacommute.com</a>), public notices and display advertisements in general circulation and minority/community newspapers, newsletters, report synopses, Take Ones/Rider Alerts on transit vehicles Rideguides, and news releases. In addition, SANDAG sponsors public outreach events to promote transportation programs and gauge public opinion on transportation and other regional needs. Special workshops and other forums are offered as needed to focus attention on individual projects and encourage the public's involvement. Policy No. 18 and SANDAG's Public Participation/Involvement Program meets federal transportation planning process regulations.

### **CHAPTER 3: THE NEED FOR TRANSIT**

We don't need to wait for the future to feel the effects of regional growth. As streets and roads become more congested during longer periods of the day and affordable housing continues to be pushed further away from our city centers, people must spend more time traveling, thus eroding their quality of life and the quality of the region. As we prepare for the future we must strive to reverse this negative impact of growth by improving the region's mobility.

During the last 20 years, the growth in travel demand has consistently outpaced the growth in population and employment, and this trend is expected to continue through 2030. Like most metropolitan areas experiencing rapid growth, the San Diego region has not been able to keep up with the demand for travel. Many of the region's major transportation facilities are operating at or beyond their capacity, and we cannot expect that building new roads and freeways will solve all of our transportation problems. We must also maximize the efficiency of the region's transportation system by focusing on moving people (person throughput) rather than vehicles (vehicle throughput). The best way to increase person throughput is with a robust transit system.

As with any service, designing a successful transit system begins with a comprehensive understanding of peoples' travel demands. Where are they coming from? Where do they want to go? When do they want to travel? What travel factors are important to them – speed, safety, comfort, cost, reliability, etc.? Answering these questions will allow us to make the most of our transit resources by providing the appropriate services to the areas and during the times that match the public's transportation demands.

#### UNDERSTANDING OUR CURRENT AND POTENTIAL CUSTOMERS

Since market research forms the backbone of any private sector development and investment strategy, SANDAG conducts periodic surveys to support the planning and development of transit services in the region. A telephone survey of residents and an on-board survey of transit riders are both conducted every three to five years, with the most recent ones completed within the last few years. These surveys help us better understand who our current riders are, why people use or don't use transit, and what changes we should make to improve service for our existing riders and to attract new riders.

Based on the most recent resident survey completed in 2003, 85 percent of respondents have ridden transit in the region, and 51 percent used transit sometime within the past 12 months. However, only 9 percent indicated that they use transit regularly – at least once per week. These statistics indicate that the majority of people who used transit within the past year are occasional riders who use transit to get to Qualcomm Stadium, special events in downtown San Diego, or due to special circumstances.

While many types of people use the region's transit services and for different purposes, the typical transit rider fits a much narrower profile. When we look closer at the survey results of our regular transit riders, we notice two defining characteristics – in general, they are from low income households and do not have regular access to a car<sup>1</sup>. According to the 2003 onboard survey, over half of all respondents were from households that earn less than \$20,000 per year, with close to 66 percent earning under \$30,000 per year. Meanwhile, San Diego's 2003 median household income is nearly around \$50,000. The survey also indicated that almost three quarters of all respondents did not have access to a car for the trip they were

<sup>&</sup>lt;sup>1</sup> One exception is the average Coaster commuter train rider who generally comes from a higher income household and has regular access to a car.

making, and 65 percent of them came from households with one or no automobile. In addition, 40 percent of our riders are under 30 years of age.

The demographics for Corridor Services like Coaster and I-15 HOV lane express buses are different than other services. Operating experience in San Diego has shown that providing higher-quality transit that has its own priority (i.e., bypasses congestion) can attract a choice rider market. This ability to attract choice riders shows promise for achieving the RTP's goals of getting more people on transit, thereby expanding the capacity of the transportation infrastructure without building roads, by moving people, not cars. Also, transit mode split into downtown San Diego approaches 20 percent for peak periods and mode split in the I-5 South Bay corridor is approximately 16 percent, demonstrating that where good transit service is provided, people use it. These results show that investments in transit, transit priority, and amenities can attract people to transit and help improve mobility – a key goal of the RTP. Consistent with the RTV, a variety of transit services (i.e., Transit First) is needed to both serve transit dependents and attract choice riders.

Based on our most recent resident and onboard survey, we can see that our current ridership is mostly transit-dependent, with the exception of the Coaster commuter rail passengers and I-15 express bus riders, where approximately 80 percent have a car available to make the trip and higher than average incomes. This research indicates that, on the basic transit system, people use our service because they have no other alternative. This point is emphasized by the fact that our household survey found that nearly 60 percent of our past riders stopped using transit as soon as they bought or repaired a car. In fact, 39 percent of them stopped using transit because it took too long, while 33 percent said that the service was inconvenient. Others did not like their travel experience onboard transit.

The market research conducted for the development of Transit First shows that improving the speed and schedule reliability of service by providing transit travel priority to avoid traffic congestion are the most important transit improvements for both existing and potential riders. For existing riders, improving the access of our services, both geographic and temporal (days and hours of service) is also an important factor, since they are largely transit-dependent. For our potential market of "choice" riders (people with various travel options) we must also focus on providing a travel experience that is competitive with the automobile. Addressing all of these criteria will allow us to improve service for our existing riders as well as attract new riders.

If a car is available, most San Diegans choose to drive instead of taking transit. There are three primary reasons for this mode choice:

- 1) Speed and Reliability compared to the automobile, transit service is generally slow and unreliable, particularly for longer distance trips;
- 2) Accessibility transit is not accessible, whether geographic (does not operate in areas needed) or temporal (does not operate during the times of day or days of week needed); and
- 3) Travel Experience transit does not fulfill people's travel preferences, such as safety, comfort, and cleanliness.

#### WHERE ARE THEY COMING FROM AND GOING TO?

The first step in improving the accessibility of our services is to understand the travel patterns of the region, and how they are changing.

#### Population

Since most trips begin or end at home, it is important to understand where people live in the region. In 2000, the San Diego region housed over 2.8 million people (see Table 3.1). Nearly one half of the population resided in the Central and North City areas of the region, including downtown San Diego, Mid-City, National City, Pacific Beach, and the Golden Triangle. Other areas of high population concentrations include the South Suburban communities of Imperial Beach and Chula Vista, the East Suburban cities of El Cajon and Santee, and the North County areas of Oceanside, Vista, and Escondido. Figure 3.1 shows the distribution of population throughout the region.

Although most of the population still resides in the established urban areas of the region and there is a surge in the number of residential units in downtown San Diego, we can expect to see a shift towards the newer suburban communities, particularly in South Bay and North County. Due to the lower densities and discontinuous street patterns, these areas are typically harder to serve with transit.

Within the next 10 years we can expect to see much of the residential development occur outside of the traditional urban centers (see Figure 3.2). Although downtown and southeast San Diego will continue to experience high growth rates, most of the population increase is expected in the newer communities of East Chula Vista, Spring Valley, Rancho San Diego, and the North County Coastal inland areas east of Del Mar, Encinitas, Carlsbad, and Oceanside.

#### **Employment and Major Activity Centers**

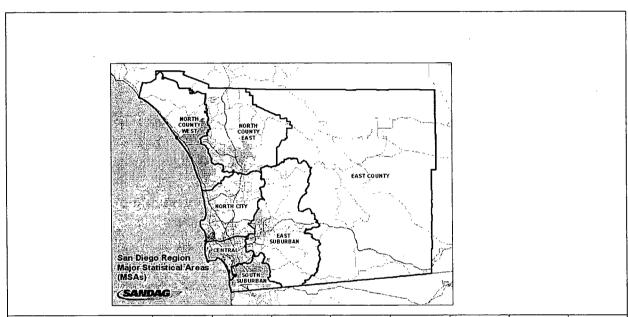
Now that we understand where people are coming from, we need to know where they are going. Since work trips make up the largest portion of travel demand during the peak periods, and the highest levels of congestion occur during the peak periods, it is important to understand where major employment centers are located throughout the region, as well as where we expect them to be in the future. Over the past decade San Diego has experienced a shift in the regional economy from predominantly local services to an export-driven economy, including industries such as biomedical production, computer, and electronic manufacturing. This change in economic focus has resulted in the development of new business centers and industrial parks located primarily in suburban areas of the region.

Although downtown San Diego continues to be a center of business, most employment is, and will continue to be, in suburban business parks located in Golden Triangle, north along the Interstate 15 corridor, and in Otay Mesa. While it is assumed that people travel regionally to get to work and major regional attractors, most of their other trips are made locally.

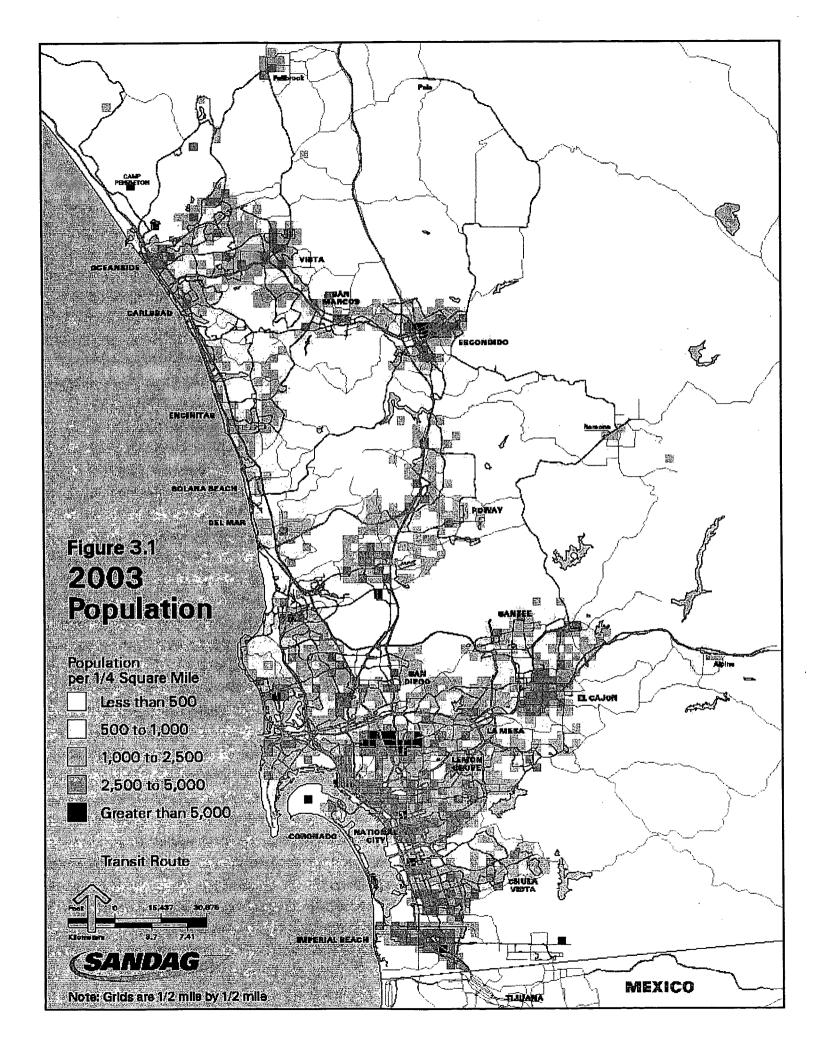
In 2000, 1.4 million jobs were located throughout the region (see Table 3.1). Most of the employment was located in downtown San Diego, Midway/Sports Arena area, Mission Valley, Kearny Mesa, Golden Triangle, Mira Mesa, Rancho Bernardo, Carlsbad, and San Marcos. Figure 3.3 presents the distribution of employment throughout the region. As evident in Figure 3.4,

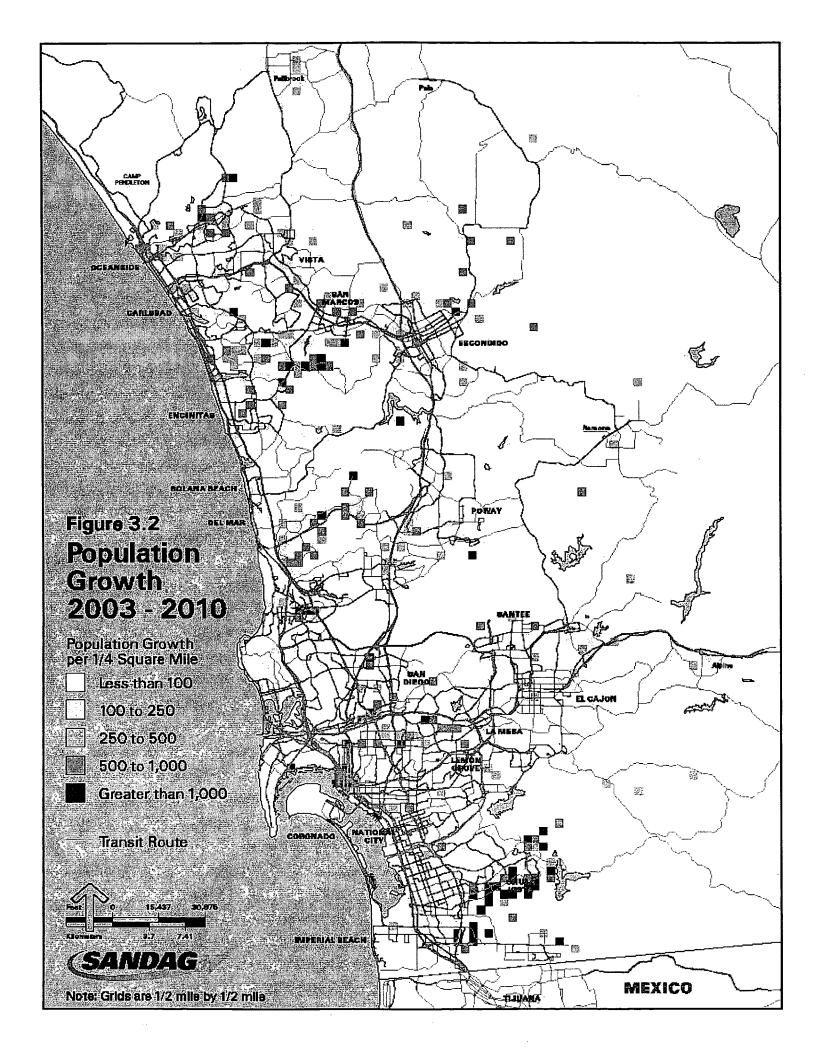
employment growth by 2010 will continue to be located primarily in the suburban areas of the region. Although downtown San Diego will continue to experience high employment growth, most of the new jobs will be located in the established business centers listed above, as well as newer facilities in Poway and Otay Mesa.

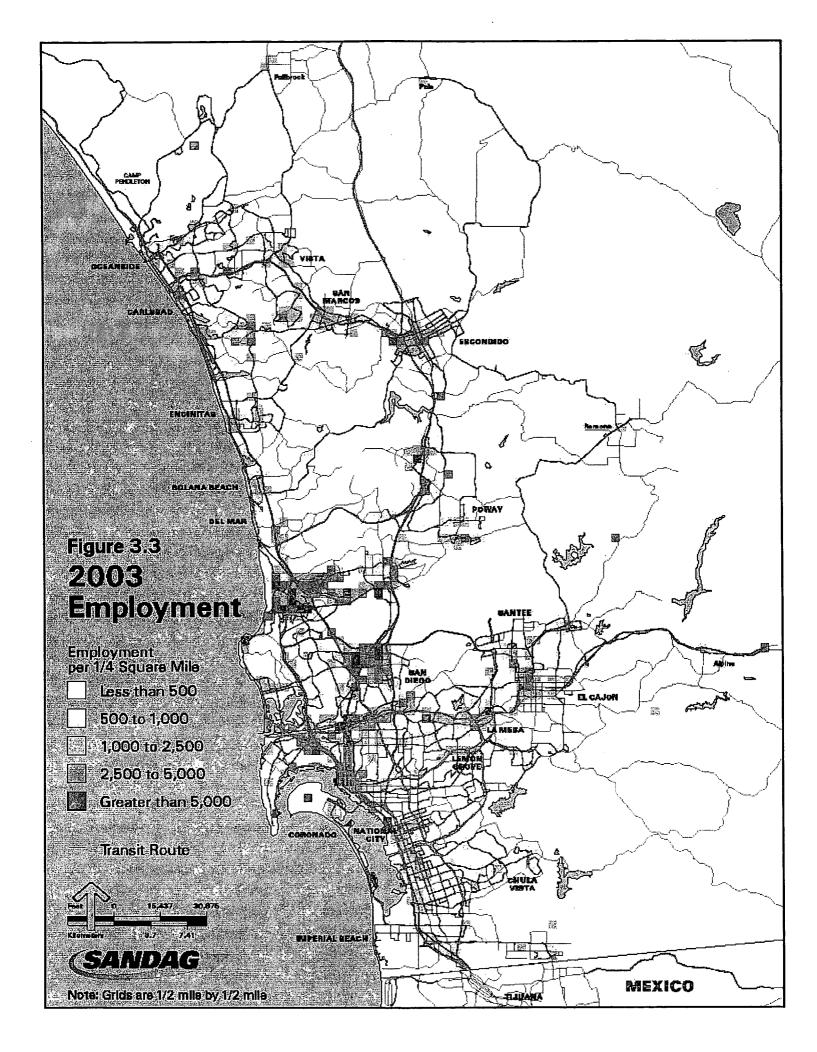
Table 3.1 Population and Employment (2003 and 2010)

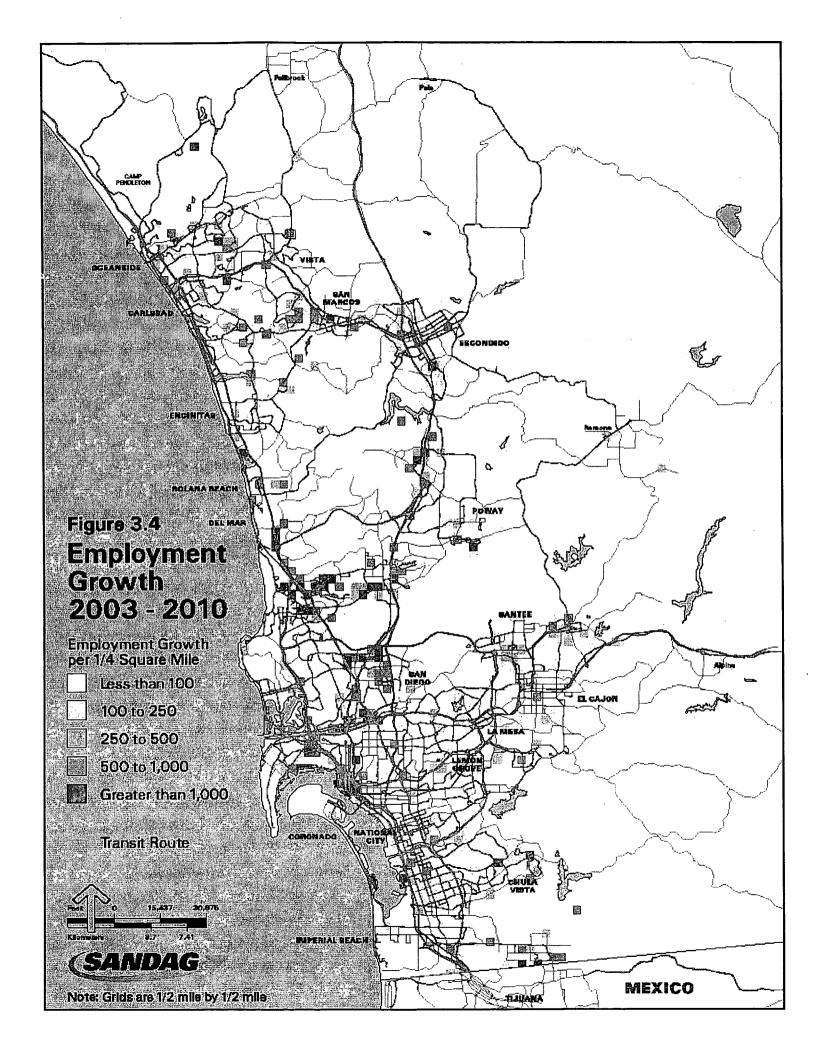


					North			
į			South	East	County	North	ļ	
	Central	North City	Suburban	Suburban	West	County East	East County	Total
2003 Population	643,523	698,641	341,526	475,614	392,575	402,450	21,775	2,976,104
2010 Population	667,377	741,724	410,096	493,456	433,886	439,748	25,434	3,211,721
Population Change 2003-2010	4%	6%	20%	4%	11%	9%	17%	8%
2003 Employment	320,125	556,746	90,749	148,449	164,303	146,249	4,884	1,431,505
2010 Employment	337,797	584,480	103,140	154,426	183,147	156,921	8,611	1,528,522
Employment Change 2003-2010	6%	5%	14%	4%	11%	7%	76%	7%









Although work trips are a large portion of the daily trips in the region, people travel for many other reasons, including school, shopping, medical appointments, recreation, entertainment, and visiting friends and family. Many of these trips are made locally within a person's community. As shown on Figure 3.5, hospitals, schools, and shopping centers are evenly distributed throughout the region to provide local access to residents. However, major attractors, such as universities, tourist attractions, and regional shopping centers, draw visitors from throughout the region. These major attractors are concentrated in the established urban areas of the region, including downtown San Diego, Mission Valley, North Bay, Mission Bay, and the Golden Triangle.

# WHEN DO THEY WANT TO TRAVEL?

Knowing where people want to go leads to only part of the solution for improving transit accessibility. We also need to understand when people need to travel.

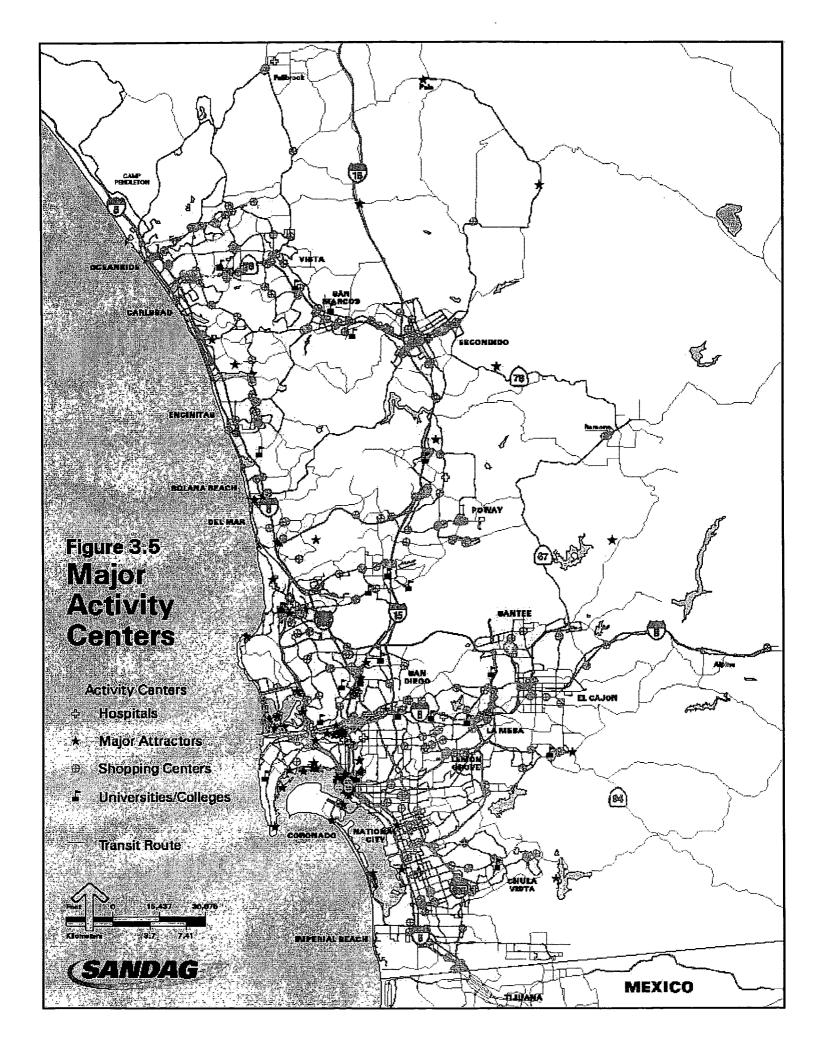
For many businesses, a typical work schedule is 8 a.m. to 5 p.m. from Monday through Friday. Morning and afternoon peak-hour congestion indicates that this is still the predominant work schedule in the region. However, recent surveys and studies<sup>2</sup> indicate that weekday work schedules vary a few hours from the typical schedule. Many employees are not on a strict schedule, and have the flexibility to arrive at work early or late. In addition, some businesses allow their employees to maintain flexible schedules such as 9/80 work weeks where employees work nine hours per day, and receive one day off every two weeks.

Commuter services should still focus on the traditional work week to serve the largest number of trips possible and increase capacity during the highest demand periods. However, these services may also be warranted at specific times during the night and on weekends when popular work shifts begin and end. Transit service to major regional attractors may need to be provided or enhanced during specific times of the year when the demand is greatest. Finally, local services should provide convenient access to community destinations throughout the day and on every day of the week.

Work schedules also vary by industry. For example, retail stores, restaurants, movie theaters, and other services are open well into the night and/or on weekends. Other businesses, including manufacturing, hotels, and hospitals, are open 24 hours per day, seven days per week. Many employees of these businesses work late night and/or weekend shifts. Since a higher percentage of these service workers are transit-dependent, the need for transit services during these off-peak periods is critical for them to maintain employment.

Since most people are at work during the weekdays, many of their other trips are made at night and on weekends. Most of these trips, such as going to the store, medical appointments, or visiting friends and family, are made on a regular basis. Travel to major regional attractors, however, generally follows a seasonal pattern. For example, traffic to major universities is greater during weekdays in the fall, winter, and spring, when school is in session. In contrast, attractions such as the beaches, the Zoo, SeaWorld, and Seaport Village are frequented much more during summer weekends than during any other days of the year.

<sup>&</sup>lt;sup>2</sup> Route 844A on-board survey and employer surveys conducted for Poway Business Park and Rancho Bernardo.



# WHAT ARE THEIR TRAVEL PREFERENCES?

In 2001, the region's transit agencies conducted a resident survey<sup>3</sup> to better understand the factors that influence choice riders in their travel experience. Eight key factors were identified as being important considerations for choosing a mode of travel – the need for flexibility and speed, sensitivity to personal travel experience, sensitivity to personal safety, concern for the natural environment, sensitivity to use of time,

To compete with the automobile, we must make our services faster, more flexible, and more enjoyable.

sensitivity to transportation costs, sensitivity to crowds, and sensitivity to stress. However, only two of these factors—sensitivity to personal travel experience and the need for flexibility and speed—proved to be common in the majority of responses.

As a follow up to this research, the 2003 resident survey asked several questions about the perception of flexibility, speed, and travel experience for transit compared to the private automobile. Figure 3.6 shows the average responses to these questions.

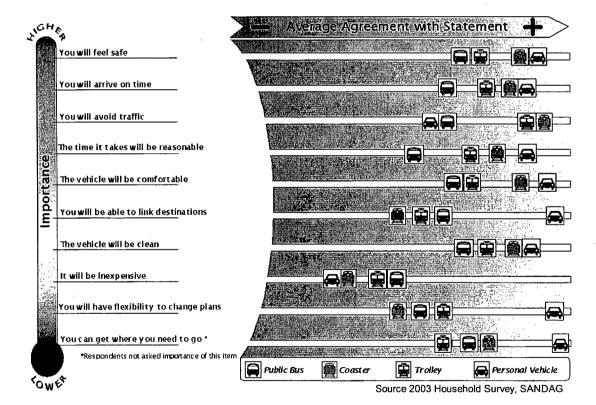


Figure 3.6 Agreement with Travel Statements by Various Modes

<sup>&</sup>lt;sup>3</sup> "Market Research Approach for TransitWorks Long-Range Strategy, prepared by Cambridge Systematics for MTDB in 2002.

In general, travel experience, including safety, comfort, and cleanliness, rated higher in importance compared to flexibility and cost. The Coaster proved to be the most similar to the private automobile for travel experience, while the bus and trolley service were perceived to be less clean, comfortable, and safe. The perception of speed of transit compared to a private automobile varied by transit mode. Modes with dedicated right-of-way outside of mixed-flow traffic, such as the Coaster commuter rail and San Diego Trolley light rail services, were competitive to driving, and even surpassed the private automobile in avoiding traffic. Existing bus service, however, was not perceived as being a fast transportation alternative. In terms of flexibility, none of the transit modes were competitive with driving.

### RESEARCH CONCLUSIONS AND GUIDANCE FOR TRANSIT PLANNING

While people have travel needs at all times of the day and our desire is to accommodate as many trips as possible with transit, the biggest demand is during peak periods. Since these trips are regular/routine work trips, they are the best ones to serve with transit. Discretionary off-peak trips are harder to capture except for transit dependents for whom we need to provide effective basic levels of service. Due to financial constraints and the diverse nature of our service area, we can't provide high levels of service all the time. As a result, the primary policy goal is to provide commuter service during the most congested times of day, thereby increasing transportation mobility when capacity is constrained, and providing effective and efficient basic service during off-peak times.

Based on the foregoing discussion, we can make three key conclusions that will help guide the development of transit service improvements in this RSRTP. First, transit is an important part of the region's transportation system and has an important part in expanding its capacity. Second, a well designed transit system can serve travel between the major activity centers throughout the region. Finally, a transit system that is competitive in terms of travel time, convenience, and comfort can be an attractive alternative to the automobile for work and other higher-volume trips.

# **CHAPTER 4: THE EXISTING TRANSIT SYSTEM**

This chapter provides a broad overview of the region's transit system, as well as the challenges and opportunities we face in providing efficient and effective service throughout the region. A more detailed description of the transit system can be found in the technical appendices.

### **OPERATING ENVIRONMENT**

SANDAG oversees transit service throughout the County of San Diego. Its jurisdiction consists of 4,261 square miles. However, most of the development is centered on the western half of the county. The physical environment within the region consists of hills, canyons, lagoons, and bays, which limit the travel corridors connecting our region, and result in circuitous and non-contiguous street patterns. Combined, these factors present a challenge to providing access and a high level of service to all areas of the region.

San Diego County is bordered by Orange and Riverside Counties to the north, Imperial County to the east, and Mexico to the south. With more affordable housing opportunities in Western Riverside, San Diego County is experiencing a significant increase in travel demand from Riverside County into the region. Likewise, with the busiest international border in the country, many of the trips made within the region originate in Mexico.

Although the RCP envisions intensification of development in our urban centers, the existing built environment consists of medium density urban centers and lower-density suburban development, with the exception of downtown San Diego and University City. In addition, ample parking and affordable gas prices provide added incentive for people to drive.

### Types of Service

Providing service within the context of San Diego's diverse topography, development pattern, and population is a challenge. Therefore, we must provide a family of services that is tailored to fit the different travel markets and operating environments we serve. The trolley, Coaster and express bus routes provide fast interregional service along major travel corridors (Regional and Corridor services), while local bus service (Local services) provides convenient access to homes, businesses, and other local or nearby destinations. Demand-responsive services (Neighborhood services) operate in lower-density areas that lack distinct travel patterns, while ADA paratransit service provides basic mobility for senior and disabled citizens.

Since various services are designed to meet different needs, they must be developed and evaluated according to their primary function. For example, commuter express services are designed to provide fast service from a few points of origin to a common destination. In contrast, local bus service should provide access to origins and destinations along the entire length of the route. Therefore, we should expect to see a greater number of passengers served by local bus service, due to higher passenger turnover along the route, while express services should achieve faster operating speeds. Understanding these differences is crucial towards developing the appropriate type of service for each travel need. SANDAG and the region's transit agencies have identified service categories within the Regional Corridor, Local and Neighborhood service concepts to distinguish among services, to help plan for and provide a diverse transit system, and to allow for a more equitable comparison of service performance to support the family of services strategy.

### Service Provision

Transit service in the region is provided by two transit agencies; the Metropolitan Transit System and the North County Transit District. Within MTS there are five different transit operators—Chula Vista Transit (CVT), Metropolitan Transit System Contract Services (MTSCS), National City Transit (NCT), San Diego Transit Corporation (SDTC), and San Diego Trolley, Incorporated (SDTI). Under the umbrella of SANDAG and its policies, the transit agencies strive to provide a seamless system of services to the public. Policies related to service planning and implementation, fare structure and setting, and public involvement, have been adopted by SANDAG since agency consolidation in July 2003. A policy related to land use/transit coordination is under development. These policies promote an integrated regional transit system, including coordinated services and schedules between transit agencies, a systemwide cash and prepaid fares structure, and regional traveler information.

### Service Coverage

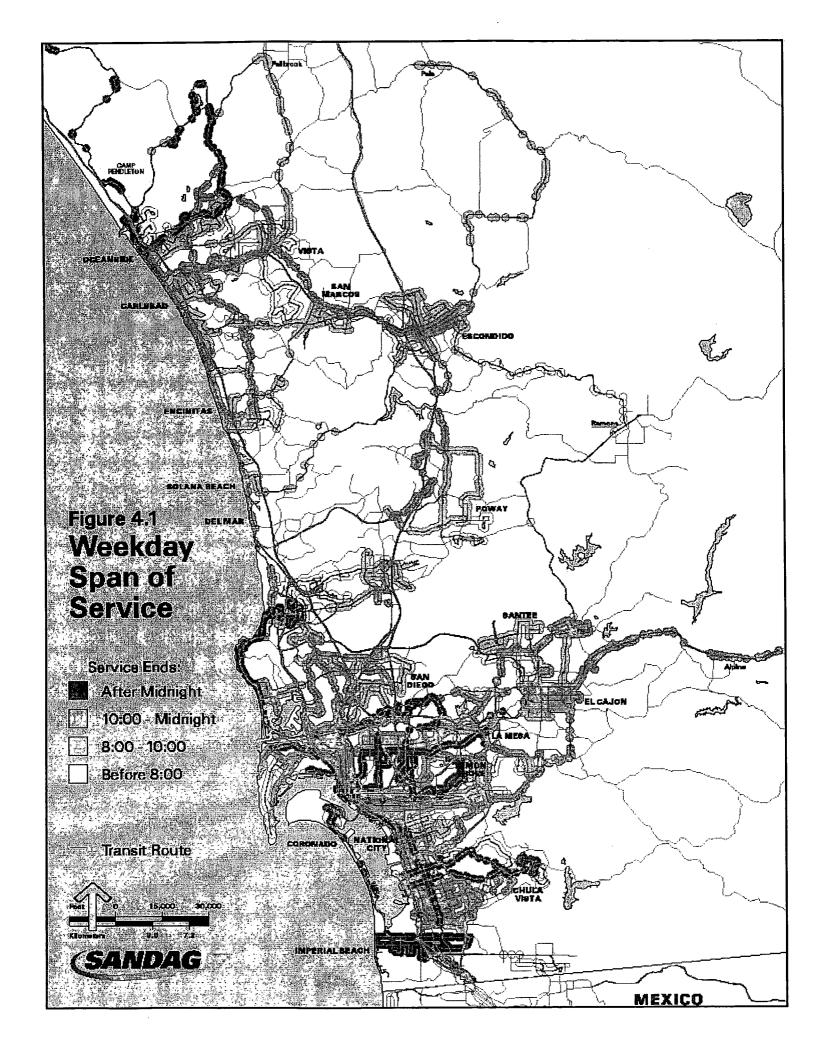
As shown in Figure 4.1, good geographic coverage is provided throughout the region. This coverage is reduced at night when overall travel demand is less. Only major travel corridors connecting established urban areas are served late at night. Figure 4.2 shows a similar reduction in service levels in some geographic coverage on weekends when service is limited in the outlying areas of the region. Frequency, or level of service, also differs throughout the region. As presented in Figure 4.3, frequency of service is more enhanced in urbanized areas where development patterns and travel demand warrant a higher level of service.

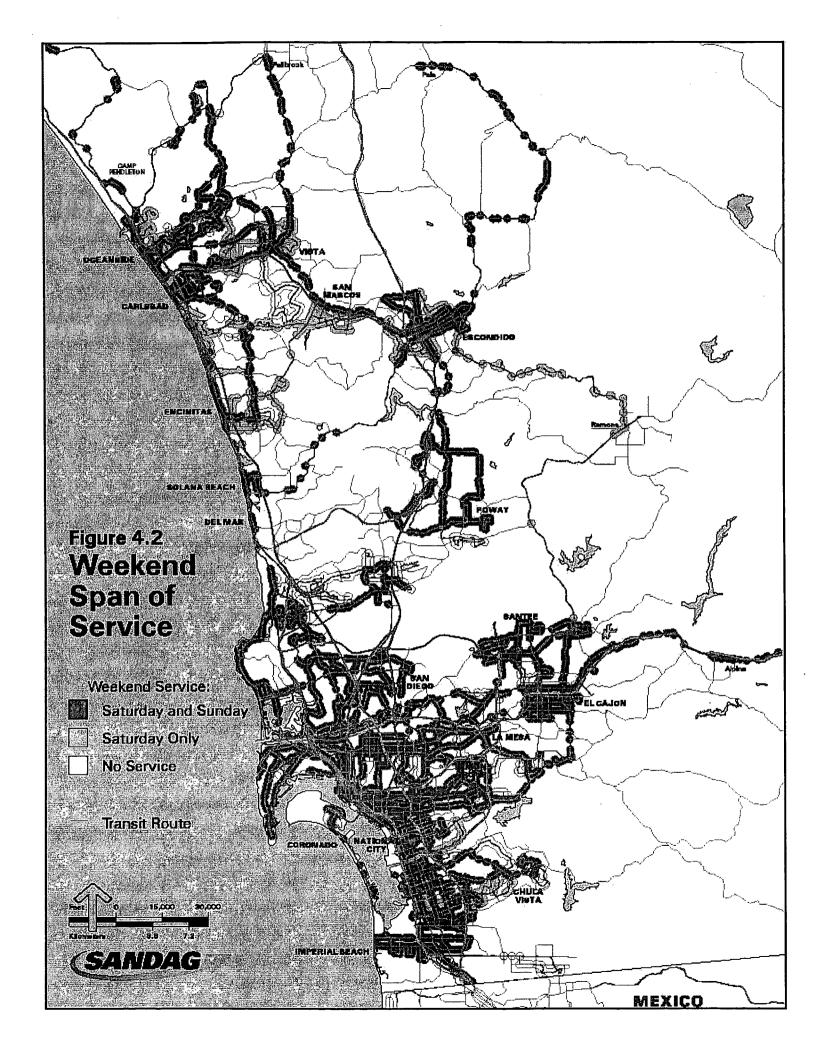
#### Transit Facilities

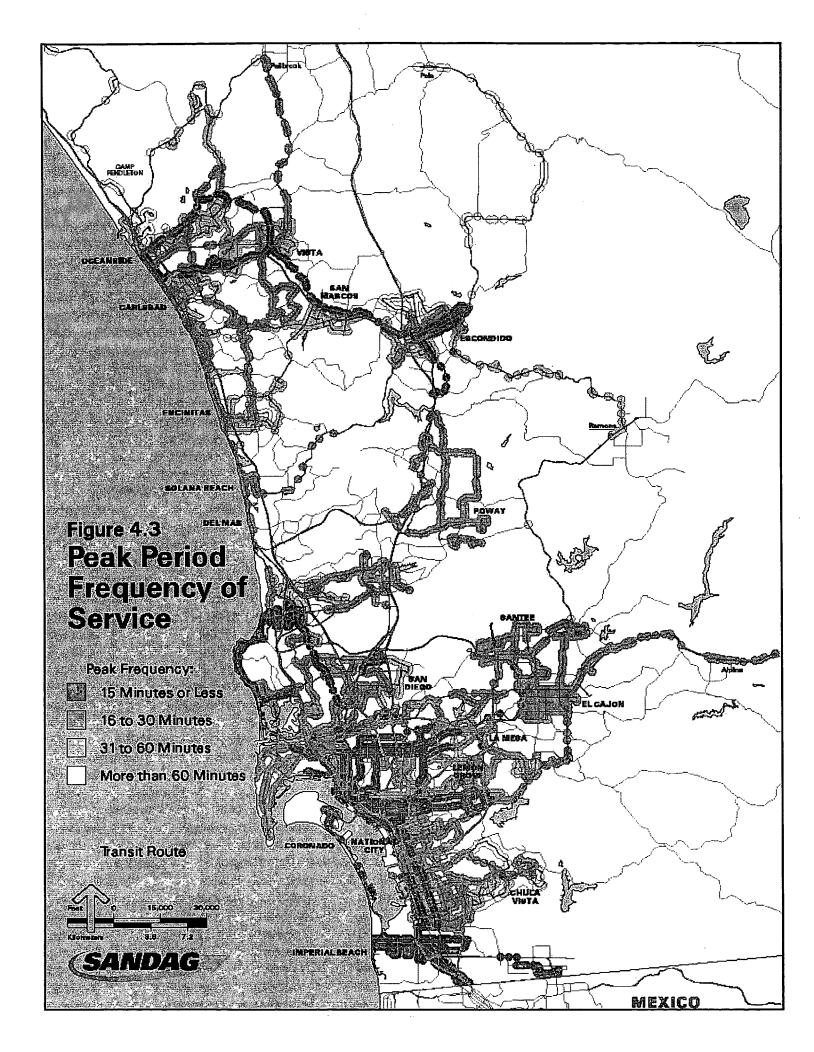
Operating a public transportation system requires a fleet of buses, paratransit vehicles, light rail cars, and commuter rail coaches. To keep the system working well, there is a need for ongoing investment in the region's transit infrastructure. Many of the rail facilities are over 20 years old, and capital replacements and upgrades are necessary to keep the system running efficiently and ensure the service reliability needed to attract and keep our customers. New vehicles and upgraded maintenance facilities are also needed for the bus system. Based on recent estimates, MTS and NCTD need \$64 million annually for capital replacement and maintenance needs. At the same time, we need to expand our infrastructure in both bus and rail facilities to provide the transit capacity needed to meet the region's mobility requirements. This need for both capital replacement and capital expansion is one of the key challenges facing the region's transportation system. SANDAG and the transit agencies are working together to address this challenge. A description of the existing facilities and rolling stock is presented in this section for the region's bus and rail services.

#### **Bus Facilities**

The fleet of vehicles in the San Diego region includes over 800 buses and approximately 200 minibuses and vans. While the majority of buses are diesel-fueled, MTS operators continue to replace their retired buses with compressed natural gas (CNG) engines that emit less air pollution compared to diesel. Over half (51 percent) of the MTS fixed-route bus fleet is currently operating on CNG. Nearly one-third (31 percent) of NCTD's fleet operates on CNG. Other vehicle design innovations that are currently being incorporated into new vehicles include low-floor technology, automated passenger information, automatic fare collection, and an advanced scheduling and dispatching system. These innovations are designed to improve the accessibility of vehicles to senior and disabled customers, provide better customer information, and improve the efficiency and effectiveness of the transit system.







Maintenance and fueling facilities are needed to ensure that these vehicles are able to operate safely and reliably. There are several bus maintenance facilities within SANDAG's jurisdiction that provide fleet fueling, maintenance, and storage. These facilities are located to provide quick and convenient access to the various subareas of the region.

The existing transportation system includes a variety of facilities that support and enhance the operation of transit service, including HOV lanes and freeway ramps, exclusive bus lanes, signal prioritization, queue jumpers, park-and-ride lots, bus pads and turnouts, and preferential traffic restrictions (see Figure 4.4). All of the existing priority treatments are located in the MTS service area. These facilities are discussed in more detail in the "Opportunities and Challenges" section below. Under the RTV, SANDAG envisions that transit priority treatments will be implemented throughout the region to promote faster, more reliable, and competitive transit services.

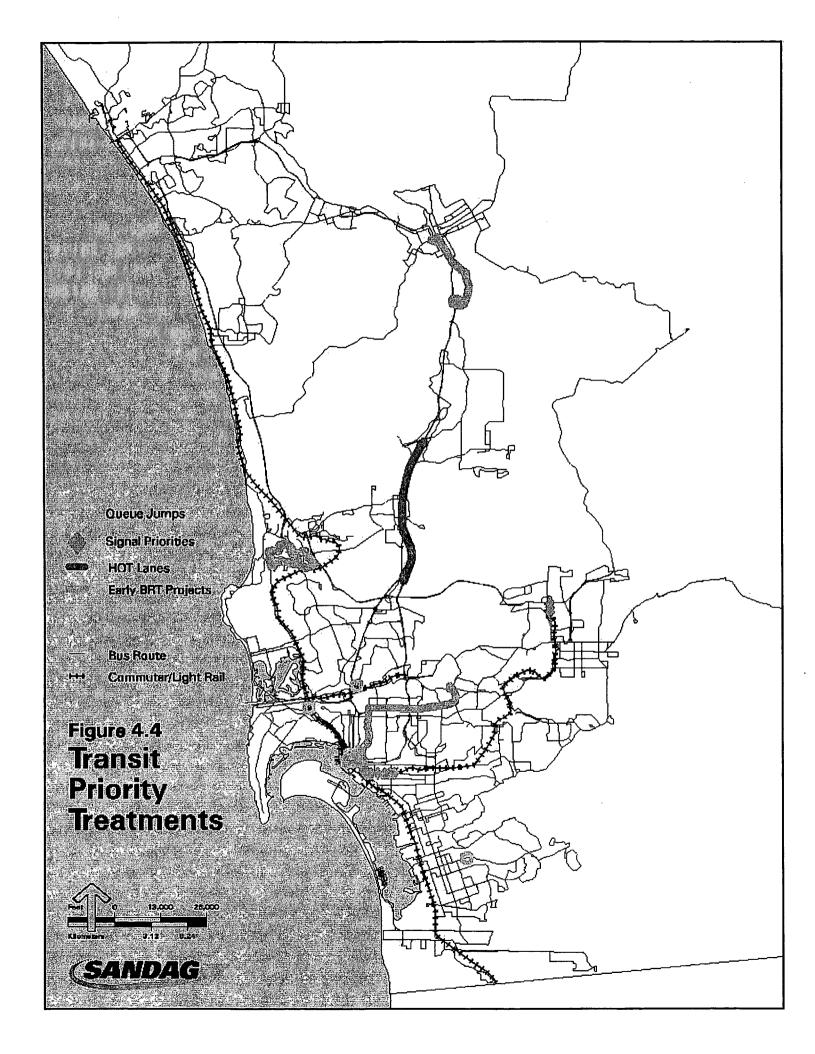
Finally, accessible, safe, and clean bus stops, shelters, and transit centers are also important to a well-operated transit system by providing comfort and convenience to passengers. Bus stops are installed at all access points to the transit system, while transit centers provide shelters and stops at locations where many local and regional routes come together. There are currently over 7,600 bus stops in San Diego County, with over 5,500 in the MTS area and over 2,100 in the NCTD area. Transit centers are the hubs of the region's transit system, providing initial access and transfers in a clean, safe, and comfortable environment. Many transit centers provide parking, adding to the convenience of accessing the region's transit system by automobile. The region's transit centers are shown in Figure 4-5.

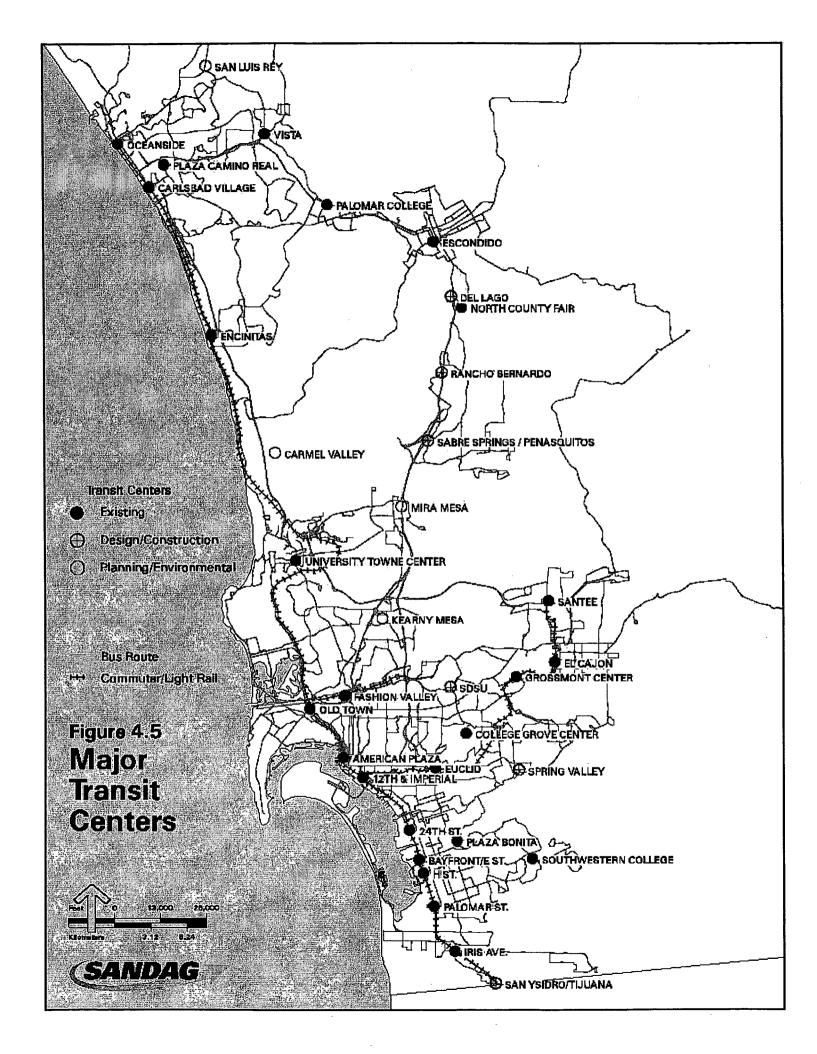
Proper bus stop location must strike a balance between access and efficiency. Bus stops should provide convenient and easy access to major destinations, at junctions with other routes for transfer opportunities, and in areas with high ridership. Although placing more stops along a route may improve access, too many stops negatively impact quality of service, travel time, operating costs, productivity, and efficiency. Therefore, bus stops should be strategically placed to maximize access, while the number of stops along a route should be minimized to achieve greater operating speeds, efficiency, and quality of service.

Bus stop amenities are generally installed based on demand. Benches and shelters are provided at stops that demonstrate moderate demand, while transit centers are established at major transfer locations where significant ridership is demonstrated, usually along rail corridors. The RTV envisions that these transit centers, many bus stops, and future BRT stations will be greatly enhanced with advanced designs and customer conveniences, and will be the catalyst for higher-density land use development.

### Rail Facilities

San Diego County has two rail transit operators: the San Diego Trolley light rail system and the Coaster commuter rail service. When the four Mission Valley East light rail transit stations are added to the Trolley system in summer 2005, there will be 53 stations in the Trolley system. The total one-way length of the system will be 53 miles when the six-mile Mission Valley East extension opens. The Coaster has eight stations along its 41-mile length. The region's rail fleet includes 123 light rail cars, and seven commuter rail locomotives pulling 28 coaches. Commuter rail locomotives are diesel-electric, while SDTI's rail vehicles are electrically propelled. New low-floor light rail vehicles are being procured for the Mission Valley East extension. Two rail maintenance facilities serve the light rail and Coaster systems.





Priority treatments for these rail services take many forms, the most basic being the exclusive right-of-way provided by the rail lines themselves. Other forms include traffic signal priority treatments (e.g., Commercial Street), signaling systems and gates to stop cross traffic when operating in exclusive right-of-way, and grade separations. Stations are generally spaced farther apart than bus service to provide access to activity centers, park-and-ride lots, and neighborhoods, while maintaining higher operating speeds. Station facilities can range from simple designs like many of the downtown stations to large multimodal facilities like the Oceanside Transit Center. Joint developments are planned or in place for many of the region's rail stations, helping to support Smart Growth initiatives.

#### Supporting Programs

#### Marketing

Educating people about public transportation and the services available to them will always be a challenge. SANDAG and the region's transit agencies must continuously look for fresh, original marketing opportunities to effectively promote transit as a viable alternative to driving. The marketing departments of SANDAG, MTS, and NCTD participate in community events, launch route and service-specific marketing programs, and participate in regional and national campaigns to promote transit usage, including the federally funded Public Transportation Partnership for Tomorrow (PT2) campaign. Essentially, we try to reach the general public with our various efforts, in hopes of capturing new riders with a message that will relate to them uniquely.

Our marketing departments are also responsible for designing and producing public information materials to inform the public of our services, fare changes, new programs, and other changes to our services. Materials include the Regional Transit Map (RTM), timetables, Ride Guides, brochures, Take One and Rider Alert notices, and much more. Their efforts are what are seen and heard onboard vehicles, at bus stops and transit centers, on billboards in the community, in radio advertisements, and in press releases. Other information sources include our Internet site (www.sdcommute.com), The Transit Store (located at First and Broadway in downtown San Diego), and the customer information telephone line (1-800-COMMUTE). Information is presented in multiple languages and in various formats to reach the broadest audience.

## Security

Our security programs also help to improve the image of the transit system while promoting safety on board vehicles and at major transit centers. In addition to uniformed officers, we incorporate technology such as closed-circuit television (CCTV) to continuously monitor vehicle and station activity. These programs have resulted in a safer transit system and one that is generally perceived as such.

#### **Transit Priority**

Transit First Now! is an ongoing program developed within the framework of the Transit First strategic plan and RTV to provide localized priority treatments for the existing transit system. Through evaluation of congestion "hot spots," transit route on-time performance and surveys of bus drivers, SANDAG has identified a series of locations and route segments for potential transit priority treatments. Priority could be provided through such measures as queue jump lanes and signals at busy intersections, short transit-only lanes on congested arterials, and signal priority along major streets. More discussion of transit priority facilities is included below.

### **CHALLENGES AND OPPORTUNITIES**

Since transit service is provided in a constantly changing operating environment, it is important for us to understand the external factors that influence our ability to provide efficient and effective transportation services. It is important to understand the challenges we face, but it is even more important to take advantage of the opportunities that are presented towards meeting these challenges. The following section presents the greatest challenges and opportunities we face today in developing and implementing a robust transit system that will meet the mobility needs of the region.

### Traffic Congestion

#### Challenge

Traffic congestion consistently tops the list of concerns on public opinion surveys, and for good reason. Our region currently suffers from a high level of peak-period congestion on many major freeways and arterials, making the daily commute to work and school increasingly time-consuming. Existing transit services, which primarily operate in mixed-use traffic, must also compete in the same congested environment as solo auto drivers, resulting in continued declines in speed and reliability.

SANDAG will develop transit priorities over the next five years as part of the RTV to address the impacts of traffic congestion on the speed, schedule reliability, cost, and competitiveness of transit service.

Transit's operating costs are also impacted by traffic congestion. Faced with longer running times and slower speeds, more buses and drivers must be assigned to each route to maintain existing service frequencies. In the recent past, more than \$1 million annually has been spent on additional resources to mitigate the impacts of traffic congestion, which could otherwise be spent on new and enhanced services.

### Opportunity

Although congestion is expected to increase as a result of regional growth, SANDAG's commitment to the RTV promotes measures to protect transit services from congestion, and improve its competitive position with the automobile. By implementing transit priority measures at major congestion hot spots, transit service will bypass congestion, enabling it to maintain reliable and possibly faster service compared to driving alone. The following are examples of transit priorities for intersections and along major travel corridors that SANDAG will be developing over the next five years to support the existing and future transit system.

- Signal Priority Signal priority for transit extends a green light on a traffic-signal cycle to allow the
  uninterrupted flow of an approaching bus or light rail vehicle. Signal priority is presently employed on
  C Street, 12th Avenue, and Commercial Street in San Diego to facilitate trolley movements.
- Queue Jumpers Queue jumpers provide bus priority through congested intersections by providing short bus-only lanes at intersection approaches that allow buses to reach the head of intersection, bypassing the line of stopped cars at a red light. The bus receives a special advance green light approximately three seconds ahead of the adjacent car lanes, allowing the bus to get a jump on entering the intersection prior to the auto traffic. Queue jumpers exist in San Diego at westbound Friars Road at Frazee Road, southbound Fourth Avenue at E Street, eastbound on Broadway at Third Avenue, in Chula Vista on East H Street at Hidden Vista Drive, and on East Palomar Street at Heritage Park. Two additional queue jumpers are under construction in San Diego at northbound First Avenue at Beech Street and eastbound Rosecrans Street at Pacific Highway (the approach to the Old Town Transit Center).

- HOV and Managed Lanes As freeway congestion increases, HOV and managed lanes will become more important for helping buses avoid congestion, maintain schedule reliability, and reduce travel times. These lanes restrict uses to buses, carpools, and, in some cases, paying single-occupant automobiles through the FasTrak program. HOV lanes currently exist on Interstates 5 and 15 and a 10-mile extension of the I-15 HOV facility is currently under construction north of SR 56. This extension will be in the form of managed lanes, providing four HOV lanes with a movable center barrier to accommodate peak direction flow. HOV lanes also exist at many freeway on-ramps in the region.
- Freeway Shoulder Lanes Because the addition of HOV and managed lanes in the region requires a major capital facility, SANDAG is pursuing an interim short-term solution to the need for transit priority on freeways. In partnership with Caltrans, SANDAG is implementing a demonstration project to convert freeway shoulder lanes to transit-only lanes on segments of the I-805 and SR 52 freeways. The year-long demonstration, modeled on a transit freeway shoulder program in Minneapolis, will be underway in summer 2005. Existing Route 960 will operate on the freeway transit lanes during the demonstration. The demonstration will be evaluated for its ability to improve transit reliability and speed, as well as safety, passenger, auto and bus driver perceptions, and its potential application to other locations in San Diego County.
- Exclusive Bus Lanes This concept extends beyond HOV and managed lanes by creating lanes exclusively for bus use. Bus-only lanes allow bus service to bypass congestion along a major travel corridor. An example of an exclusive bus lane is located at the north end of downtown San Diego, where 11th Avenue merges onto northbound SR 163. This lane will be extended several blocks further south as part of the Smart Corner redevelopment project. Bus-only lanes can also be beneficial at freeway access points and at major bus stops, such as at the onramps from University Avenue and El Cajon Boulevard to Interstate 15 and the peak-period bus lane on Fifth Avenue between Beech Street and I-5.

### **Lower-Density Development**

### Challenge

Traffic congestion and dependence on the automobile is largely the result of lower-density, homogenous development. A continuation of the region's suburban employment and residential development patterns will increase our dependence on the automobile by reducing the access, convenience, and effectiveness of transit. In addition, the low-density development results in longer travel times, more trips made, and increasing amounts and duration of congestion. Adding to this situation is the need

SANDAG has committed to addressing problems related to lower density development through the development and implementation of the RCP that focuses on the principles of smart growth, including better land use and transportation coordination.

for travel to schools in developing areas, which is already challenging due to the sharply defined peaks of this kind of travel.

### Opportunity

Since SANDAG has recognized for many years that we cannot build our way out of congestion, the RCP represents a bold new approach to regional planning specifically focused on coordinating and integrating land use and transportation planning and development. The RCP helps to minimize the impacts of growth on our infrastructure and natural resources, and maintains our quality of life. Central to the smart growth strategy is good coordination between land use and transportation development that focuses compact, efficient, and higher-density development in key urbanized areas where an integrated transit system is planned to provide efficient and effective mobility between and throughout these areas. In addition, the

strategy encourages the development of mixed-use and pedestrian-friendly communities to encourage walking and bicycling for neighborhood trips and to access transit stations.

To implement the RCP, SANDAG will incorporate smart growth criteria into the evaluation and prioritization of transportation projects for funding. This approach to programming scarce transportation dollars is used as an incentive for local jurisdictions to develop coordinated smart growth land use plans. SANDAG will also promote smart growth by providing incentive funds to plan and develop mixed-use, walkable, and transit-oriented land uses through a \$25 million Smart Growth Incentive Pilot Program. Under the pilot program, grant funds would be made available to local jurisdictions for projects that help integrate transportation and land use, such as transit-oriented developments and other smart growth projects that make areas more conducive to mixed land uses, walking, and biking. The pilot program will focus on implementing ready-to-go projects that improve access to transit in areas with high activity levels and on transportation-related improvements that encourage the smart growth development envisioned in the RCP. The pilot program would be a precursor to the longer-term \$280 million funding program included in the extension of the *TransNet* local transportation sales tax. Lessons learned from the pilot program would be used to develop this longer-term incentive program.

In addition, SANDAG and the region's transit agencies actively pursue opportunities to enter into joint-use development projects around major transit stations. Larger projects include mixed-use development consisting of office, residential, and/or retail uses, while smaller projects often include convenience services such as dry cleaners and banking. These types of developments help make transit convenient to where people live, work, and shop. Examples of completed joint development projects include the James R. Mills Building at the 12th & Imperial Transfer Station, the Sweetwater Union High School Adult Education Center at the 24th Street Station in National City, and the apartments and day care center at the 47th Street Station. Other transit-oriented development (TOD) projects include America Plaza, Rio Vista, Fenton Parkway, Hazard Center, La Mesa Blvd., and the new Smart Corner downtown with trolley running diagonally through it. In addition, efforts are currently underway to develop property at the Morena/Linda Vista, Grossmont Center (La Mesa), and E Street Trolley Stations, the Solana Beach Coaster Station, and the San Luis Rev bus transit center. A number of transit facilities currently under construction will offer new opportunities for joint development. The Mission Valley East trolley extension and Sprinter Coaster Rail line between Escondido and Encinitas provide a number of joint development opportunities around the new rail stations. And the I-15 BRT stations under development at Sabre Springs/Penasquitos, Rancho Bernardo, and Del Lago as part of the extension of the I-15 HOV/managed lanes, provide an opportunity for joint or TOD at these BRT facilities.

SANDAG and the transit agencies are proactive in reviewing development plans to promote transit-oriented development around transit stations and stops and to ensure that transit is addressed or integrated into the design. Formal agreements such as memoranda of understanding (MOUs) were established between many of the region's local jurisdictions and the former Metropolitan Transit Development Board that outlined a formal review process. SANDAG has assumed the review responsibility for the MTS area while NCTD conducts a similar development review in the NCTD area. (The adoption of a Land Use/Transportation Coordination policy by SANDAG will seek to consolidate this function.) In addition, SANDAG works with local jurisdictions to incorporate smart growth principles in community and general plan updates. Bringing existing bus stops up to ADA standards and securing new shelter and bench stops are among the most common types of improvements with financial benefits, while preservation of transit right-of-way, strengthening of pedestrian connections to transit stops, and contributions toward major transit facilities such as transit centers and rail stations are part of the review process and program. As an example of the effectiveness of this effort, in 2003 a total of 161 transit improvements were secured valued at \$1.635 million. Without these facilities secured through the development review process, the costs for these transit improvements would have to be borne by the transit agencies.

SANDAG is currently developing the Land Use/Transportation Planning Coordination to be adopted in early 2005. It is expected to call for SANDAG and local agencies to promote and enhance the coordination of land use and transportation planning through MOUs and early review of local long-range planning documents, development regulations, and development projects. It is also expected to call for early local involvement in the preparation of SANDAG regional plans and forecasts, and identification of smart growth areas. In accordance with its land use and transportation integration policy responsibilities, SANDAG should also take the lead in actively engaging entities and agencies responsible for siting and developing major public facilities, such as schools and hospitals, to ensure that transit access to these facilities is both feasible and cost-effective.

### Financial Constraints

#### Challenge

As a result of local, state, and federal budget deficits, funding to build new transportation projects is limited. More importantly, operating and maintaining the existing transit system is becoming an increasing challenge. Higher operating costs and lower levels of public subsidies have resulted in annual operating budget deficits in the range of \$10 million-\$13 million. This trend is expected to continue

Budget deficits limit our ability to maintain existing services and develop new ones. We must continue to seek new funding sources and secure our existing ones, including the TransNet sales tax measure.

for the next several years. Historically, this operating deficit was addressed through the use of nonrecurring revenues (e.g., capital or reserve funding). However, as these one-time revenue streams become depleted, it is essential to find new opportunities for funding, and/or adjust services to a sustainable level. For the past two years, MTS services have been reduced to help address the budget deficit. NCTD continues to adjust services to maintain a sustainable level of service.

#### Opportunity

MTS is currently conducting a Comprehensive Operational Analysis (COA) of its existing services. The goal of this effort is to restructure the services to more efficiently serve the region's travel demands and save \$10 million-\$13 million in annual subsidy requirements. The study includes development of a new service concept for the area and a comprehensive community input process. Any service reductions will be made primarily to those services that have become unproductive due to the changing local economy, development patterns, and/or travel demand. Initial recommendations are expected by April 2005 to provide input into the development of FY 2006 operating budget. Subsequent recommendations from the COA will be incorporated into future RSRTPs. NCTD's budget situation is tight but stable at this time. No major service changes are planned until the Sprinter opens in December 2007.

As a result of the recent operating deficits, SANDAG has been proactive in seeking non-traditional funding sources to maintain existing services and implementing new ones. SANDAG and the transit agencies have been successful in securing several million dollars in federal Jobs Access Reverse Commute (JARC) and local Air Pollution Control District (APCD) funding to continue Sorrento Valley Coaster Connection service and Routes 905 and 960, as well as the implementation of a new reverse commute route from downtown San Diego to the Poway Business Park via Interstate 15, and a Coaster Connection service in Carlsbad. In addition, SANDAG is evaluating opportunities to partner with residential developers to incorporate transit privileges into rents or homeowner association fees that will guarantee additional sustainable fare revenues to support service enhancements to those communities.

SANDAG and the region also have an opportunity to address our budget deficit and improve the transit system through new operating funds that will be available as a result of the extension of the *TransNet* sales tax measure, approved by San Diego County voters in November 2004. As a result, local funds will be

available for matching state and federal capital grants, and to provide operating funds for the new LRT and BRT services and for some growth in the basic transit system. While the extension of the sales tax measure provides much needed capital and operating dollars to maintain existing services while developing new services as envisioned in the RTV, the availability of sufficient transit operating funding for the existing system will continue be an issue.

#### Image of Transit

### Challenge

Our most recent household survey, conducted in 2003, determined that most San Diegan's consider transit the last resort in transportation options. This response is not surprising considering that the perceptions of transit in meeting people's travel needs and preferences are poor. Based on the survey, the four most important factors in people's choice of transportation mode are: personal safety, reliability, ability to avoid congestion,

Implementation of SANDAG's RTV will change the way we perceive transit from a slow, unreliable, and unattractive transportation system to one that is competitive with the private automobile in all of these factors.

and reasonable travel time. The perception of bus service was significantly lower for all four mode choice factors when compared to trolley, Coaster, and the private automobile. However, transit services with dedicated right-of-way and more enhanced ammenities, stations, and vehicles were perceived to be fairly competetive with the automobile. In fact, trolley and Coaster service were perceived to be significantly better in avoiding congestion compared to driving alone because these services operate outside of congested freeways and roads.

#### Opportunity

The survey results tell us that a majority of San Diegan's will use transit if it is accessible, and competitive with the private automobile in terms of convenience, reliability, and speed. In fact, 54 percent of respondents stated that they would use transit under the right circumstances. The RTV attempts to develop these "circumstances" with a network of accessible, enhanced, high-speed, and reliable transit services spanning the region. These services would operate at high frequencies throughout the day, evening, and weekends, and bypass congestion using dedicated transit lanes or transit priorities.

SANDAG is currently developing several projects to showcase the range of technologies and service concepts that are part of the RTV. The Showcase Bus Rapid Transit Project is planned to operate at high frequencies between San Diego State University and downtown San Diego via El Cajon and Park Boulevards. Traffic signal priority and short transit lanes are proposed to help the service maintain speed and schedule reliability through congested areas of the route. Operating in a similar arterial street environment, the Super Loop project in North University City also proposed to use traffic signal priority, queue jumpers, and other treatments to increase the speed and reliability of operation. The South Bay BRT project plans to use a combination of freeway managed lanes or transit shoulder lanes and dedicated transit lanes on arterial streets to bypass congestion and provide a dependable travel time between South Bay communities and downtown San Diego. The I-15 BRT project will be implemented as part of the managed lane project, with direct access ramps connecting the HOV/managed lanes with transit centers adjacent to the freeway right-of-way. In all of these projects, innovative station designs will provide better access and customer amenities. Other elements, such as the automated fare collection system and regional transit management system, will provide "smart card" fare payment technology, real-time traveler information, and will enable transit operators to more efficiently manage the operation of the services. Once implemented, these projects will meet and exceed the perceptions of safety, reliability, speed, and avoiding congestion compared to rail transit, as well as driving alone.

### Aging and Disabled Population

### Challenge

As the number of residents in the region continues to grow, so does its aging population. We anticipate the senior population will significantly increase as Baby Boomers prepare for retirement, and with it, the demand for senior transportation services will also increase. Today, approximately 14 percent of the region's population consists of people that are age 60 or older. We expect this number to grow by about 3 percent by

As the senior and disabled population continues to increase, we, as a region, must work together to develop innovative approaches to providing adequate and cost-effective mobility options for this growing community.

2010. By 2030, we anticipate that 25 percent of the residents of San Diego County will be age 60 or greater. With the increasing number of aging citizens that are unable to drive, there will be a steady growth in the demand for senior transportation services. In addition, the number of disabled persons is also expected to rise. However, along with this new opportunity to capture a greater percentage of the travel market comes the increasing need to provide senior and disabled services in ways that are both appropriate and cost-effective.

#### Opportunity

Transit vehicle design can help improve the accessibility and ease of boarding for people who are able to use fixed-route services. Kneeling buses and low-floor vehicles allow easier boarding and deboarding by providing a lower clearance to the street or rail platform. Vehicles are also equipped with wheelchair lifts to pick up or drop off passengers who are not able to step onboard the vehicles. Finally, priority seating is provided at the front of vehicles to increase the convenience for senior and disabled riders.

As mandated by federal law, SANDAG provides Americans with Disabilities Act (ADA) paratransit services to complement all general fixed-route services in the region. ADA paratransit is a demand-responsive, point-to-point service that operates similar to taxi service. As such, it is a very expensive service to provide because of the low number of passengers served compared to the number of mile and hours it operates. Due to this high cost, eligibility to use this service is limited to those disabled persons who are unable to use fixed route transit, as defined in the federal guidelines governing the eligibility requirements, safety, equity and cost-effectiveness of the service.

Since transit can only meet the needs of those who can use fixed-route services and certifiable disabled persons, the region must provide other options for the majority of seniors and disabled persons within our communities. Some lower-cost transportation alternatives include ridesharing (e.g., carpool or vanpools), nonprofit transportation services (e.g., All Congregations Together, College Avenue Senior Center, and FISH), and community-based volunteer driver programs (e.g., City of Vista's Out and About program). The Coordinated Transportation Services Agency (CTSA) provides technical information and assistance on specialized transportation services for transportation-disadvantaged communities, and can help with any of these as well as other transportation options. As part of the effort to coordinate transportation services, the CTSA provides information on alternative transportation, referral services, workshops and travel training, grant assistance, and coordination with existing Health and Human Services Agency (HHSA) transportation services. Examples of alternative providers include coordinated programs using volunteer drivers in Vista, Poway and Rancho Bernardo. In addition, the STRIDE website developed and maintained by the CTSA provides a wide range of useful information on social service providers in San Diego County.

SANDAG's Subcommittee for Accessible Transportation (SCAT), acting as the region's Social Service Transportation Advisory Council, held hearings to receive public comments on unmet transit needs in San Diego County, as required by the California Public Utilities Code. Also attending the hearings were representatives of the region's transit districts and the CTSA. The purpose of the hearings was to assist

SANDAG and the region's transit operators in identifying unmet needs of transit-dependent and transit-disadvantaged persons, including the elderly, persons with disabilities, and persons of limited means. The hearings were held in Vista and San Diego in October and November 2004.

Testimony was received from 67 respondents, making 200 individual comments. These comments fell into several categories for both fixed-route and paratransit services for seniors and persons with disabilities. They included the need for expanded fixed-route and ADA paratransit services, better on-time performance, and transit accessibility improvements. General comments about the needs of transportation-disadvantaged persons will be used by SANDAG during the update of the annual short-range transit planning and budget process. Many comments were specific to individual fixed-route and paratransit services.

SCAT reviewed the comments and recommended that the Transportation Committee accept them for consideration during the annual short-range transit planning and budget process, and also forward the comments to the transit agencies for operational planning purposes. In addition, SANDAG is developing a mid-term program for an action plan to analyze needs for seniors' transportation in the region, identify gaps and deficiencies, and develop more comprehensive coordinated programs to meet those needs. Toward this end, the TransNet reauthorization, approved by voters in November 2004, includes a mini-grant program to support innovative transportation services for seniors.

# **CHAPTER 5: HOW ARE WE DOING?**

### **GOALS AND OBJECTIVES**

In 2002, SB 1703 (Peace) formally consolidated MTDB, NCTD, and SANDAG into one regional transportation agency to ensure that coordinated and well-balanced transportation solutions are planned and implemented to meet current and future travel needs. This consolidation provides an opportunity to establish regionwide policies, goals, and objectives for transit service planning and development. These policies, goals, and objectives help to translate SANDAG's Regional Transit Vision into working guidelines. The policies provide the guiding framework for planning, designing, and implementing transit. The goals are generalized statements that describe the outcomes SANDAG intends to achieve consistent with the policies. The goals are supported by statements of objectives that will be evaluated at the end of each year to determine progress made in the previous year toward their achievement. Table 5.1 presents the goals and objectives for the next five years. They have been designed to reflect SANDAG's focus on regional policies that can be addressed through the transit system and services. More specific operational goals and objectives are left to the transit agencies.

Table 5.1 Transit Service Goals and Objectives

Goal	Objectives
Regional Transit System Development – Transit service should strive to address needs and deficiencies in the regional transit system.	Eliminate one or more transit deficiencies identified in the FY 2005-2009 RSRTP and/or individual transit agency performance goals.
System Productivity – Transit service should strive to improve system productivity.	<ul> <li>Reduce duplication of services (i.e., routes, schedules).</li> <li>For new and enhanced services, at least meet minimum productivity standards (to be defined through the RSRTP service evaluation process) for similar types of services.</li> <li>Optimize the amount of service provided within available funding.</li> <li>Improve operational efficiency though the Productivity Improvement Program and related efforts.</li> <li>Facilitate and promote strategies to provide priority for transit operation on streets and highways.</li> <li>When required by funding constraints, develop service reductions that minimize impacts to current passengers, maintain service throughout the region where demand is demonstrated, and maintain network connectivity to the extent possible.</li> </ul>
Capital Investments – Transit service should support major transit capital facilities and investments.	<ul> <li>Provide high levels of transit service to regional transit centers and regional transit services</li> <li>(i.e., rail and bus rapid transit services) in concert with local transit service needs.</li> </ul>
Network Connectivity – Transit service should maximize network connectivity.	<ul> <li>Maintain and enhance timed transfers at high-volume transfer locations as demand warrants, particularly to regional services and at transit centers.</li> <li>Support local and regional travel demand through provision of transit services unconstrained by jurisdictional boundaries.</li> </ul>
Travel Demand - Transit service should meet travel demands.	<ul> <li>Provide appropriate levels of transit service (frequency and span) to sufficiently accommodate demand.</li> <li>In general, provide higher frequencies during periods of greater demand.</li> <li>Plan transit service improvements and revisions with input from riders, the public, and the community.</li> </ul>
Customer Experience – Transit service should provide a positive customer experience.	<ul> <li>Provide transit service routing that is as direct as possible (i.e., avoid out-of-direction travel while balancing directness with access).</li> <li>Provide as fast and reliable a transit service as possible.</li> </ul>
Smart Growth – Transit service should support Smart Growth areas.  Financially Sustainable Plan – Transit operating expenditures should be sustainable over time.	<ul> <li>Take advantage of opportunities presented by existing and planned Smart Growth developments when adding or revising transit services, as appropriate and feasible.</li> <li>The annual budget should be balanced and rely on available funding without dipping into reserves or depending on non-recurring sources of revenue.</li> </ul>
•	Service levels and operating expenses should match available revenue.     New ongoing operating revenue streams should be put in place.

Last year's goals and objectives are included in Appendix H. These goals and objectives reflect both regional policies and more specific operational issues. As a result of the further definition of transit service planning and implementation roles and responsibilities of SANDAG and the transit agencies through recently adopted revisions to Policy No. 18, some of last year's goals and objectives are more appropriately the responsibility of SANDAG, while others rest with the transit agencies. Therefore, in lieu of a detailed evaluation of progress toward meeting last year's goals, a more general assessment is included in this report. (The detailed assessment of our progress in achieving the objectives is also included in Appendix H.) The transit agencies will continue to establish and monitor operational goals and objectives related to their system and services.

In general, progress has been made in several areas to address last year's Regional Short-Range Transit Plan goals and objectives. The Metropolitan Transit System has initiated its Comprehensive Operational Analysis (COA) to identify service efficiencies and restructure services to better reflect travel patterns and market needs and improve system performance and quality. North County Transit District continues to implement and refine its Fast Forward service plan. Both transit agencies have extensive programs to obtain customer input on transit services, and SANDAG continues to provide support in this area through the passenger counting program and various passenger and resident surveys. Both SANDAG and the transit agencies have ongoing system and service performance monitoring programs (described below) to help assess areas needing improvement and identify programs, facilities, and other actions that can help achieve operational and regional goals. With the passage of the Proposition A *TransNet* sales tax extension, SANDAG has made progress in advancing several BRT projects, transit priority treatment programs (such as the freeway transit lane demonstration), and Smart Growth area planning to support the transit system and regional goals. The regional Smart Card fare collection equipment deployment is ongoing and the automated vehicle locator (AVL) demonstration continues.

### SYSTEM EVALUATION

In addition to establishing regional goals and objectives for the transit system and annually evaluating progress toward meeting them, SANDAG monitors the transit system on a quarterly and annual basis to help guide adjustments to the region's transit network and services in response to ever-changing mobility needs and operational environment and to maintain consistency with policies, goals, and objectives. Formal monitoring processes have been established to regularly evaluate the efficiency and effectiveness of the transit system. These are described below.

Quarterly Transit Agency Operating Performance Report. Transit agencies provide SANDAG with performance indicators for their transit operators on a quarterly basis. These data allow SANDAG to evaluate trends in the productivity and cost-effectiveness of the transit system by transit agency and mode of service (e.g., fixed-route, trolley, ADA paratransit, etc.). Performance during the current quarter and year-to-date is compared to the same quarter of the previous year to account for seasonal fluctuations in data. The comparison identifies changes to key performance indicators, including operating cost, fare revenue, ridership, passengers per revenue mile or hour, subsidy per passenger, farebox recovery ratio, and average fare. Large fluctuations in these indicators are investigated to determine the root cause of the change.

<u>Performance Improvement Program (PIP)</u>. As part of the Transportation Development Act (TDA) administration, SANDAG is responsible for monitoring the cost-effectiveness of each transit agency and operator receiving TDA funds. The PIP evaluates the performance of each operator against several performance targets set by SANDAG and the transit agencies and operators on an annual basis. In addition, transit agencies and operators commit to productivity improvement strategies to be implemented

during the ensuing year, the statuses of which are evaluated through the PIP process. Finally, the transit agency's and operator's status in achieving the recommendations from the previous Triennial Performance Audit is evaluated.

In addition to the regional transit system evaluation and monitoring conducted by SANDAG, the transit agencies conduct more specific performance monitoring on an ongoing basis. These activities include maintaining a database of customer comments and complaints to assist with service evaluation and identify when immediate actions are needed to remedy operational deficiencies, annual route-specific performance evaluations, transit operator performance monitoring, as well as transit agency budget and operational evaluations.

# CHAPTER 6: SHORT-RANGE TRANSIT WORK PROGRAM

The growing population and expansion of suburban development is resulting in increased trip-making and higher levels of traffic congestion. To address these growing pains and preserve our quality of life, SANDAG has developed an RCP and an RTV that represent a bold new approach to improving the region's mobility through better coordination between transportation and land use planning. The RCP focuses our future growth in urbanized areas characterized by compact, efficient, and higher-density land uses to reduce our infrastructure needs and preserve our natural resources. To provide mobility within and between these "smart growth" areas, SANDAG adopted the complementary RTV as the framework for transit development in the region, and the RTP (Mobility 2030) to serve as the long-range (5-30 years) infrastructure and service improvement plan for implementing the RTV. Transit First is the implementation strategy for the RTV.

Establishing a short-range (0-5 years) transit work program to support the RTV and Transit First strategy is the purpose of the RSRTP. With unlimited financial resources we would be able to provide fast, frequent, and flexible service 24 hours per day, seven days per week, to all areas of the region. However, in reality, the region is faced with severe financial constraints that limit how and to what extent we can implement the RTV in the short-term. In addition, this funding deficit hinders our ability to provide basic mobility to our existing riders. Therefore, we must adopt an approach to developing the transit system that balances the basic mobility needs of our current riders with developing the world-class transit system envisioned in the RTV. An approach for doing this is incremental, short-term implementation of the Transit First strategy.

As stated in Chapter 3, improving the speed and schedule reliability of service, as well as avoiding traffic congestion, are the most important transit improvements for both existing and potential riders. For existing riders, improving the access of our services, both geographic and temporal (days and hours of service), is also an important factor, since they are largely transit-dependent. For our potential market of choice riders, we must focus on providing a travel experience that is competitive with the automobile. Therefore, our investment strategy should focus on improving the speed and reliability of transit service, while balancing the need to improve transit access with the need to provide a competitive travel experience.

This chapter outlines a short-range transit work program aimed at achieving a balanced transit improvement strategy. The first part of the work program identifies specific recommendations for improving basic mobility for our existing riders, including the FY 2005 Regional Service Implementation Plan that presents the new or revised services proposed for FY 2005 funding consideration. The second part of the work program describes the specific efforts we are undertaking to move toward the RTV.

# **IMPROVE BASIC MOBILITY**

As stated in Chapter 4, the availability of transit service varies depending on the time of day and day of week. Although a high level of service is provided most of the time in the established urban areas of the region, other communities experience a significant reduction in service late at night and on weekends. In addition, the quality of service varies by route. Many routes experience overcrowding during peak work and school hours, while other routes demonstrate low schedule reliability due to congestion or high levels of wheelchair passenger boardings. Finally, as our population continues to age, more importance will need to be placed on providing additional transportation options for seniors. The first step toward achieving the RTV is to improve the basic mobility for our current ridership as identified below.

As presented in Chapter 3, the propensity of people to use our existing transit system is generally greater in communities with low income and low auto ownership. Figure 6.1 shows the areas of high transit propensity within the region. Chapter 3 also identified areas within the region that have a high level of trip attraction, including employment parks, retail centers, major regional attractions, and other destinations. Figure 6.2 shows the concentration of trip attractions throughout the region. As shown on Figure 6.3, areas of high transit propensity<sup>4</sup> are generally located in urbanized areas south of Interstate 8, as well as Oceanside and Escondido. In contrast, major travel destinations<sup>5</sup> are dispersed throughout the region.

Table 6.1 evaluates the service effectiveness between areas of high transit propensity (origin) and areas with greater trip attraction (destination). Twenty percent of the origin/destination pairs have "Good" service effectiveness based on fast travel times, easy connections, and high service levels when needed, while 42 percent have "Average" effectiveness and 38 percent have "Poor" effectiveness. Although service effectiveness between many of the travel pairs is considered "Poor," due to indirect routing, slow travel times, and limited service when needed, not all of these travel pairs warrant service improvements.

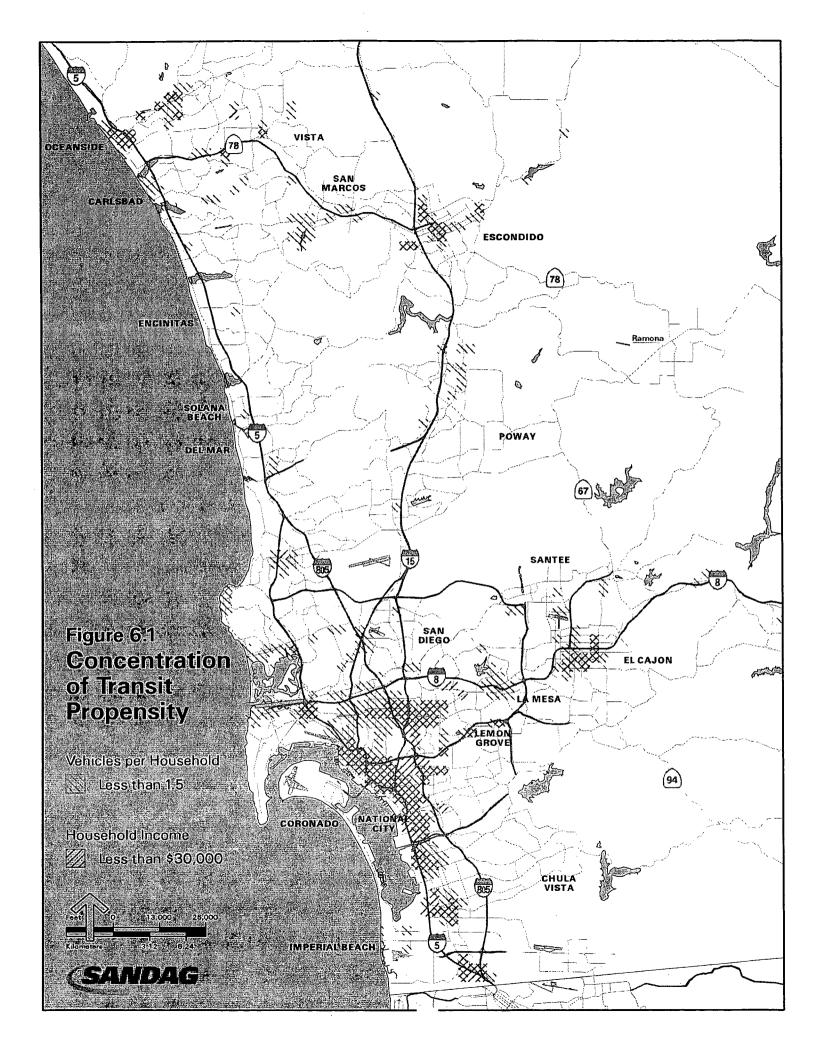
Table 6.2 shows the travel demand between each origin/destination pair. As presented, only 8 percent of the travel pairs demonstrate high travel demand, while the travel demand between a majority of origins and destinations is low. With our limited financial resources we should ensure that transit service between areas of high travel demand is "Good" before improving service between areas with low demand.

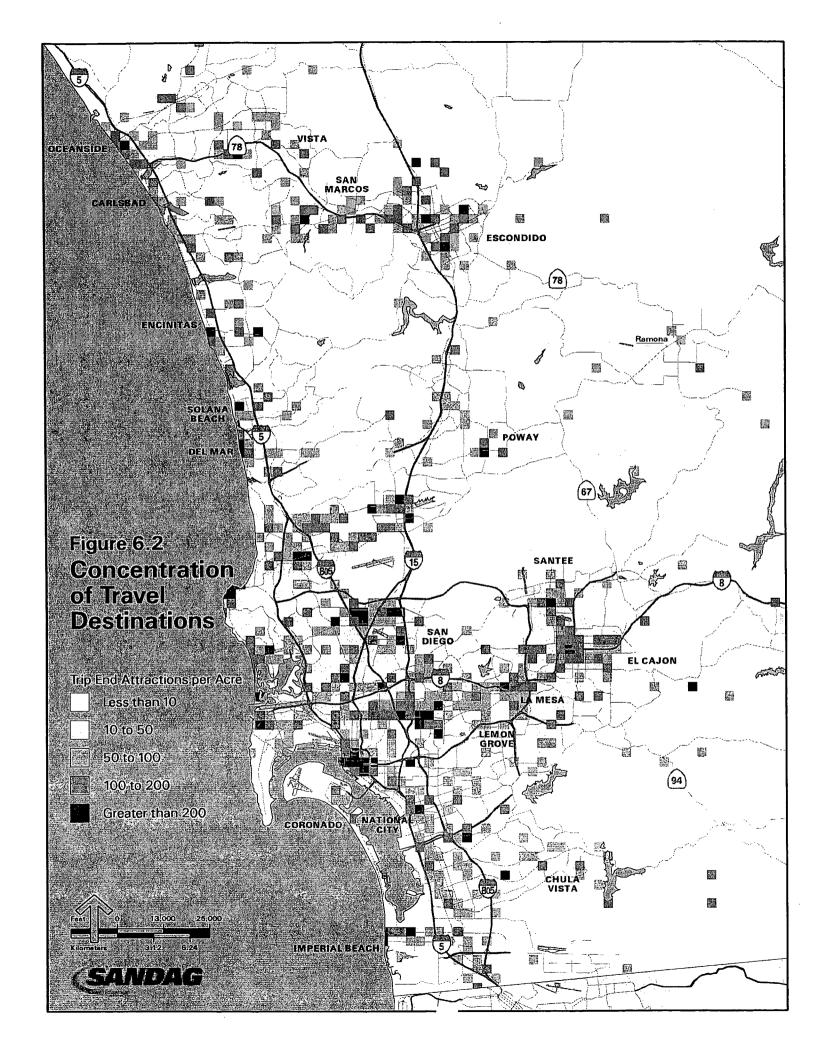
Table 6.3 compares service effectiveness with travel demand. Although service effectiveness is generally consistent with travel demand<sup>6</sup>, the following travel pairs are identified as having lower service effectiveness compared to their demand, and should be prioritized for service enhancement.

<sup>&</sup>lt;sup>4</sup> Areas with both low income and low auto ownership.

<sup>&</sup>lt;sup>5</sup> Areas with 100 or more daily trips per acre.

<sup>&</sup>lt;sup>6</sup> Travel pairs demonstrating high travel demand generally have good service effectiveness, while areas with low travel demand have poor service effectiveness.





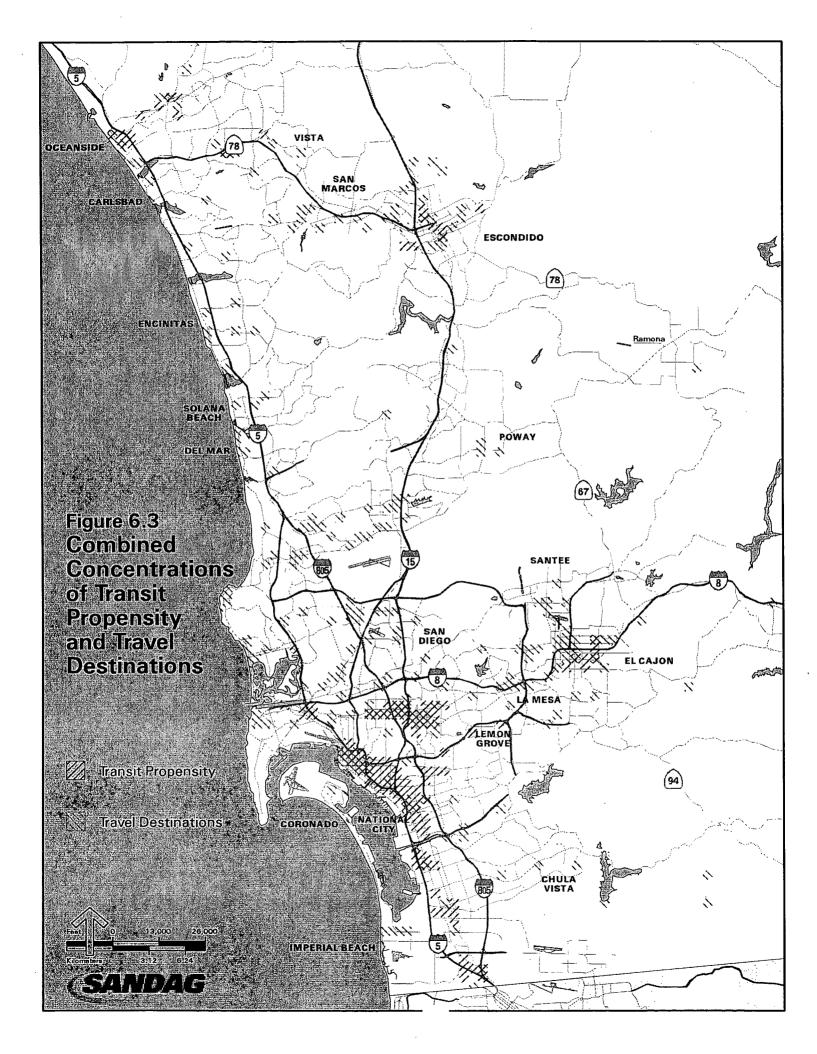


Table 6.1 Service Effectiveness Between Origin/Destination Pairs

			Concentrations of Travel Destinations																			
		Oceanside	Vista	San Marcos	Escondido	N. County Coastal	Poway Business Park	Sorrento Valley Golden Triangle	Mira Mesa	Kearny Mesa	Pacific Beach/La Jolla	Ocean Beach	Linda Vista	Mission Valley	El Cajon/Santee	La Mesa	Mid City	Downtown SD	National City/W. Chula Vista	Bonita/E. Chula Vista	Imperial Beach	San Ysidro
	Oceanside																	10.0				
	Escondido	44																				
≥	Downtown SD														144				100			
ensi	Mid City					1																
Pro	Midway/ Sports Arena							E 1T											14.			
ransi	Euclid/ Southeast SD									Ę.,						10.5						100
s of T	Lemon Grove	- (- (- (- (- (- (- (- (- (- (- (- (- (-																				
ations	El Cajon									1							3.4				10.	
Concentrations of Transit Propensity	National City/ W. Chula																4, 5					
ပ်	San Ysidro											i jár.				1					Á	

**GOOD** (Fast travel times, easy connections, service throughout the day, nights and weekends, high frequencies on major travel corridors during peak hour (15 minutes or less)



**AVERAGE** (Medium travel times, up to two transfers required, limited night and weekend service, moderate frequencies on major travel corridors during peak hour (30-60 minutes)

POOR (Slow travel times, indirect routing, more than two transfers required, none to very limited night and weekend service)

Table 6.2 Travel Demand Between Origin and Destination Travel Pairs

		Concentrations of Travel Destinations																				
		Oceanside	Vista	San Marcos	Escondido	N. County Coastal	Poway Business Park	Sorrento Valley Golden Triangle	Mira Mesa	Kearny Mesa	Pacific Beach/La Jolla	Ocean Beach	Linda Vista	Mission Valley	El Cajon/Santee	La Mesa	Mid City	Downtown SD	National City/W. Chula Vista	Bonita/E. Chula Vista	Imperial Beach	San Ysidro
	Oceanside																					
	Escondido																					
'n	Downtown SD																					
Concernations of mailsit moperary	Mid City																					
5	Midway/ Sports Arena																					
2	Euclid/ Southeast SD																					
5	Lemon Grove							1											,			
	El Cajon																				-	
	National City/ W. Chula																					
i	San Ysidro																					***

HIGH (Greater than 20,000 trips per day)

MEDIUM (Between 10,000 and 20,000 trips per day)

LOW (Less than 10,000 trips per day)

Table 6.3 Comparison of Service Effectiveness and Travel Demand

									Co	ncentr	ations	of Tra	vel De	stinatio	ons							
		Oceanside	Vista	San Marcos	Escondido	N. County Coastal	Poway Business Park	Sorrento Valley Golden Triangle	Mira Mesa	Kearny Mesa	Pacific Beach/La Jolla	Ocean Beach	Linda Vista	Mission Valley	El Cajon/Santee	La Mesa	Mid City	Downtown SD	National City/W. Chula Vista	Bonita/E. Chula Vista	Imperial Beach	San Ysidro
	Oceanside				-										·							
, A	Escondido																					
	Downtown SD																					
ensi	Mid City																					
Concentrations of Transit Propensity	Midway/ Sports Arena			<del> </del>																		
Transi	Euclid/ Southeast SD																		1			
s of	Lemon Grove																					
ations	El Cajon																					
centr	National City/ W. Chula																				- 111	
ပိ	San Ysidro																					



POOR (Service effectiveness is not appropriate for travel demand)



MODERATE (Service effectiveness is marginally appropriate for travel demand)

GOOD (Service effectiveness is appropriate for travel demand)

#### Service Gaps and Deficiencies

To address these needs in a fiscally constrained environment, MTS is conducting the COA. This comprehensive effort will restructure service to better serve today's travel patterns and reduce operating subsidy requirements. The gaps identified for the MTS area in last year's RSRTP, listed below, are being considered as part of the COA. As a result of the COA and the opening of the Mission Valley East LRT line, many of these gaps will be addressed in FY 2006. NCTD has numerous improvement needs that were identified in last year's RSRTP, as listed below. While some were addressed in 2004, many were not due to budget constraints.

#### **Direct Routings**

- Mid-City to Mission Valley While a significant amount of service is provided in Mid-City and
  Mission Valley, there is little direct service connecting these two areas. Changes to Route 13 to be
  implemented with the opening of the Mission Valley East light rail extension in summer 2005 will
  provide more direct service between these two areas.
- Euclid/Southeast San Diego to National City Area The limited service span and frequency of
  Route 603 between the Euclid Avenue Trolley Station and Plaza Bonita severely restricts Euclid and
  Southeast San Diego residents from accessing adjacent communities and using regional services at
  night and on weekends.
- South Bay to Old Town or Fashion Valley Transit Center Express An express service from South Bay to Old Town or Fashion Valley Transit Center allowing existing passengers to bypass downtown congestion along Broadway. This service would also provide congestion relief along the north/south corridors in South Bay, and would address some of the capacity issues currently experienced on the trolley Blue Line.
- Faster Service between La Jolla and Old Town or Downtown The long travel time on local
  routes between these destinations could be reduced through the provision of new express service or
  a system of transit priority treatments.

#### Intracommunity Service

- Internal Travel within National City Area Service is limited on the three National City Transit services (Routes 601, 602, and 603), which consistently prove to be some of the most productive services within the region's transit system. In addition, there is currently no service to the industrial area on the west side of National City (west of Interstate 5).
- San Ysidro Service Route 905 service should be expanded to provide more and better local service to address travel demand and provide connections to Otay Mesa.
- Internal Travel within Downtown San Diego As a result of new residential development and changing travel patterns, transit services within, into, and out of downtown San Diego should be restructured to provide better internal circulation and more efficient interregional connections.
- Enhanced Summer Service on Routes 9 and 34 Travel to SeaWorld, Belmont Park, and the beaches of San Diego is greatly increased during the summer months. As a result of budget deficits, additional summer service has been discontinued, resulting in severely overcrowded trips and poor

schedule reliability.

 San Elijo Hills – This 3,000 home planned community south of San Marcos currently has no transit service. Twin Oaks Valley Road is projected to be constructed that links san Elijo Hill with Cal State San Marcos in 2007. Service request for service to San Marcos and to the COASTER have been received.

#### Late Night and Weekend Service

- Service on Express Routes Enhanced service on existing express routes was been identified as a
  primary unmet need in the recently completed Welfare to Work Transit Study. Focus groups of
  CalWORK's clients indicated that the same trip made on an express service during the weekdays
  would take nearly four times as long on the weekends.
- Weekend Service on Coaster Despite high demand, Coaster service operates limited hours on the
  weekdays and even less service on Saturdays. No Sunday service is currently provided. Due to
  budget constraints, no planning or implementation actions were taken for this service in 2004.
- General System Late Nights/Weekends In general, most of the transit services throughout the region have limited late night and weekend service.

#### **Operational Issues**

- Overcrowding Overcrowded buses generally occur during peak work and school hours of the day, and have a direct and indirect effect on ridership. Not only do they deter potential passengers from using the service, the capacity constraint limits ridership despite higher demand. Overcrowding can be addressed by increasing service levels where and when it is needed, or by restructuring adjacent routes to accommodate the additional demand. SANDAG and the transit operators should work together to address overcrowding issues as efficiently and effectively as possible.
- Maintain and Improve Transfer Opportunities Timed connections at convenient locations based on travel demand allow riders to efficiently transfer between services and complete their trips in a timely manner. This concept is particularly important when service frequencies are low (greater than 15 minutes). As part of NCTD's Fast Forward Plan, timed transfers were implemented at all key transfer locations to improve connections between services. MTS service schedules are also developed around a "pulse" concept in which all routes arrive and depart a transfer center at the same time, allowing for transfers between services to be coordinated and timed. Since the RTV is developed around a concept of interconnected services, it is important that timed transfer opportunities are maintained and improved where transfer demand exceeds through riders, except in cases where frequencies are greater than 15 minutes.
- Schedule Coordination along I-15 corridor The numerous routes in this corridor tend to be
  scheduled to meet primary work schedules and, as a result, several buses arrive at stops in a short
  time period followed by long time gaps. A comprehensive review of travel demand and the services in
  the corridor is being conducted as part of the COA.

#### Interjurisdictional Issues

Carmel Valley Service – A key service issue to be resolved is the provision of transit service in the
Carmel Valley area. As a result of the employment and residential development in the Carmel Valley
area, including new affordable housing complexes, transit demand to and from this area is increasing.

While employment is cluster along El Camino Real and High Bluff Drive, residential areas are difficult to serve due to the low-density development and discontinuous street patterns. Service options include peak-hour service to employment areas, connections with the Coaster at the Solana Beach Station, and a lifeline link between Carmel Valley residents and the regional transit network. The region will continue their joint efforts in FY 2006 to develop transit solutions for this growing area.

- Del Mar Heights There is no coastal transit link between the Del Mar Heights area and Solana Beach as well as service to Sorrento Valley. NCTD's Board has identified this gap as a regional priority.
- Temecula to Escondido Express The I-15 Interregional Partnership Project (IRP) has identified
  express transit service between Temecula and Escondido, as well as distributor shuttles at key
  destinations, as transportation solutions to the congestion problem along I-15 between Riverside and
  San Diego Counties. Due to budget constraints, no planning or implementation actions were taken for
  this service in 2004.

Based on a variety of factors including productivity, ridership, level of demand, cost-effectiveness, land use patterns, and other items, not all of these needs are equal. Some of them have higher priority than others. The assignment of priorities takes place as an interactive process between SANDAG and the transit agencies in the development of annual budgets.

#### **Special Studies**

Many of the service gaps and deficiencies require more detailed study to develop effective solutions. Key studies to be completed in 2006 are listed below.

- Comprehensive Operational Analysis MTS is conducting a Comprehensive Operational Analysis
  (COA) of its bus and trolley services. The goal of the COA is to evaluate and restructure MTS
  services and operations to more efficiently and effectively serve the region's transit needs and meet
  regional transportation goals within the constraints of the current financial and operating environment.
  The changes recommended by the COA will be included in next year's RSRTP update.
- Mid-City Network Plan The purpose of this study is to develop a long term transit network plan for the Mid-City communities, to prioritize transit improvements, and to develop a phasing plan to conform to alternative budget scenarios. The study will examine network structure, service types, connections, frequencies, route alignments, and the relation of the Showcase Project to the Mid-City network. The Showcase Project will connect SDSU and downtown San Diego via one of the most transit oriented corridors in the region. However, as a regional service, its bus stops will be spaced farther apart than for local services, limiting direct access to the route. Therefore, to increase the ridership and productivity on this route, feeder services to the Showcase Project will be developed as part of the Mid-City Network Plan.
- University Avenue Mobility Plan Restructuring The community plan for the North Park area is being revised and transportation enhancements for University Avenue are a key element. There are opportunities to enhance bus operations and the quality of bus stops in the area.
- Carmel Valley/Del Mar Heights Development of cost-effective and efficient service proposals for the Carmel Valley/Del Mar Heights area is needed to determine how best to address the identified service deficiency in these communities.

#### FY 2006 Regional Service Implementation Plan

With limited financial resources, we are faced with difficult choices when deciding future transit investments. Each year, SANDAG develops its Regional Service Implementation Plan to guide system improvements to address gaps and deficiencies in service and implement the concepts of the RTV. However, due to current funding constraints, SANDAG and the transit agencies must adjust and, in some cases, reduce existing services while simultaneously striving to improve basic mobility and implement the concepts of the RTV.

Each year, the region's transit operators submit their individual Service Implementation Plans (SIP) to SANDAG for consideration. The SIPs list the proposed changes and new services each transit operator recommends for implementation to meet existing service gaps and deficiencies within their operations. SANDAG combines these individual SIPs into a Regional SIP (RSIP) that includes improvements proposed by transit operators as well as SANDAG staff. In years when additional funding is expected to be available, proposals for new services are prioritized and recommended for funding consideration based on a regional evaluation process established in accordance with SANDAG Policy No. 18, Regional Transit Service Planning.

As has been the case for the last several years, no additional funds are expected to be available for transit operations in FY 2006. Transit operators will receive regional operating funds in the same proportion as in the past, with approximately 70 percent allocation to MTS and approximately 30 percent to NCTD. Therefore, only those service improvements proposed by MTS and NCTD are included in this year's RSRTP; no SANDAG proposals are included. This year, no regional priorities for these service proposals have been established since implementation is dependent on each transit agency's ability to implement the services within available funding levels. SANDAG's role in service implementation will include a determination that new and revised service proposals are consistent with the goals and objectives of the RSRTP, in general with development of the RSRTP and, more specifically, at the time the transit agencies propose to implement the services. In future years, SANDAG will establish regional priorities for service improvements in the RSIP through an evaluation methodology linked to the RSRTP framework, goals, and objectives.

Table 6.4 displays how well the proposed service changes address the RSRTP Goals and Objectives. All of the proposed changes address two or more of the adopted Goals and Objectives. As each propsed service change moves toward implementation, it will be reviewed by SANDAG to determine its consistency with the Regional Consistency Checklist (see Table 2.1 in Chapter 2), in accordance with SANDAG Policy No. 18: Regional Transit Service Planning.

The MTS service proposals included in this year's RSRTP are expected to change substantially to reflect the results of the COA. The current service proposals are listed in Table 6.5 in route number order without an assigned priority by MTS. The NCTD services are listed in the priority established by the NCTD Board.

The RSIP is the basis for the transit agencies to develop their annual operating budgets for SANDAG adoption. Service changes are then implemented by the transit agencies and operators during one of the regularly scheduled service changes (summer, fall, and winter) held throughout the year. Table 6.5 presents the proposed service changes for FY 2006.

Table 6.4 Service Change Proposal Performance in Advancing RSRTP Goals and Objectives

	Table 0.4	OCI VICE OIIGIIŞ	ge Floposai Fei	ioimance in Ad	validing Rollin	Oodis and Obje	CLIVES	
	Regional							
Proposed	Transit							
Service	System	System	Capital	Network	Travel	Customer	Smart	Financial
Change	Development	Productivity	Investments	Connectivity	Demand	Experience	Growth	Stability
MTS								
Mission Valley	_	_	_	_	_			
East .	•	•	•	•	•		•	•
Connectors								
Frequency		•						
Improvements					•			
New Service								
in San Ysidro/	●	•	•		•			
Otay Mesa								
NCTD								
Frequency		•						
Improvements					•			
Extended			1					
Hours					_			
Added								
Coaster								
Connection	-							
Trips								
Coaster								
Rail2Rail &								
Petco Park	-				_			
Service					•	<u>L</u> .		
New								
Circulators								

Table 6.5 FY 2006 Regional Service Implementation Plan

Operator	Route	Service Proposal Descriptions	Pass/Hour	Sub/Pass	Annual Subsidy
Mission Va	lley East Service				
Changes					
MTS	1	Extend to terminate at new 70 <sup>th</sup> Street Trolley Station.			\$14,308
MTS	13	Restructure to provide service between Euclid and new San Diego State University Trolley stations, and extend along Montezuma Road to 73 <sup>rd</sup> Street and El Cajon Boulevard.			\$132,283
MTS	14	New route to serve the former Route 13 alignment in Mission Valley.			(included with Route 13 figure)
MTS	18	New route to replace Route 81 service between new Grantville and Rio Vista Trolley Stations.			\$120,693
MTS	81	Discontinue with opening of Mission Valley East trolley line.			(\$858,579)
MTS	876	Extend along Lake Murray Boulevard and Fletcher Parkway to replace a portion of Route 81.			\$72,718
MTS	936	Extend to terminate at the new 70 <sup>th</sup> Street Trolley Station.			(\$8,055)
Other Cha	nges				
MTS	11	Increased frequency and longer span of service on weekday evenings between 8 p.m. to 11 p.m. on existing routing.	27	\$1.67	\$57,943
MTS	13	Weekday peak-period frequency enhancement to every 15-minute on existing routing.	33	\$1.40	\$230,400
MTS	815	Increase frequency from 60-minute to 30-minute Saturdays between 10:00 a.m. and 5:30 p.m. only on existing routing.	33	\$0.25	\$3,246
MTS	905 West	New service Saturdays 6:30 a.m. to 6:00 p.m. between San Ysidro/Tijuana and Iris Avenue Trolley Stations, with a few trips to Otay Mesa.	24	\$0.49	\$6,688
MTS	908	Increase frequency from 30- to 15-minute on Saturdays 9:30 a.m. to 5:30 p.m. on existing routing.	25	\$0.62	\$24,801
MTS	929 South	Increase frequency from 30- to 15-minute on weekends 10:30 a.m. to 5:30 p.m. between 8 <sup>th</sup> Avenue and Iris Avenue Trolley Stations.	33	\$0.59	\$58,617

Operator	Route	Service Proposal Descriptions	Pass/Hour	Sub/Pass	Annual Subsidy
MTS	932 South	Increase frequency from 30- to 15-minute on weekends (7-hour	36	\$0.48	\$54,295
		period, roughly 10:30 a.m. to 5:30 p.m.) between Bayfront/E Street	ł		i
		and San Ysidro/Tijuana Trolley Stations.		<u>.</u>	
MTS	936	15-minute frequency weekdays 6 a.m. to 9 a.m. and 1 p.m. to 5 p.m.	32	\$0.71	\$75,490
		between College Grove and 70 <sup>th</sup> Street.			
MTS	955	Increase frequency from 30- to 15-minute on Saturdays 10:00 a.m. to	33	\$0.62	\$30,227
		5:00 p.m. on existing routing.			
NCTD	303	15-minute service between 5:00 and 8:00 a.m., weekdays.	30	\$0.78	\$29,763
NCTD	303	15-minute service 7:70 a.m. and 2:00 p.m., weekdays.	22	\$1.37	\$191,764
NCTD	COASTER	Renew Rail2Rail Program, all days.	150	\$13.47	\$161,600
NCTD	Carlsbad	Provide five trips to meet COASTER on weekdays.	8	\$1.99	\$20,247
	Coaster		Ì		
	Connection				
	Palomar South				
NCTD	COASTER	Continue later evening Petco Park service, summer weekdays only.	125	\$2.60	\$65,000
NCTD	Carlsbad Village	Add five morning and afternoon trips.	10	\$1.07	\$13,665
	Coaster				
	Connection				
NCTD	388	Improve to 90-minute frequency, weekdays.	15	\$2.72	\$155,794
NCTD	Plaza Camino	New circulator from Plaza Camino Real to Pacific Coast Plaza and El	16	\$3.24	\$302,854
	Real Shopping	Camino North Shopping Center, 60-minute service in both directions			
	Shuttle	between 9:00 a.m. and 5:00 p.m., seven days a week.			
NCTD	Solana Beach to	New route from Del Mar Highlands to Sorrento Valley COASTER	10	\$6.68	\$535,845
	Sorrento Valley	Station and UTC. 15-minute service weekdays between 5:30 a.m.			
	Coaster Station	and 8:30 p.m. Saturday service from 9:00 a.m. to 6:00 p.m.			
NCTD	C-Side Shuttle	Add nine weekday trips from Del Mar Heights and Solana Beach to	8	\$11.00	\$246,832
	Coaster	Solana Beach COASTER Station between 5:00 and 8:00 a.m., and			
	Connection	4:00 to 7:00 p.m.			
NCTD	338	Extend all trips to Quarry Creek Shopping Center, weekdays and	12	\$0.10	\$422
		Saturdays.			
NCTD	347	New 120-minute frequency from 8:00 a.m. and 6:00 p.m.,	5	\$13.07	\$37,980
		Sundays/holidays.	ļ.,		
NCTD	347	Restore 60-minute service on Saturdays.	5	\$8.98	\$21,005

Operator	Route	Service Proposal Descriptions	Pass/Hour	Sub/Pass	Annual Subsidy
NCTD	Poinsettia Station via Alga	Add 60-minute service between 5:30 a.m. and 8:30 p.m. weekdays. Add 11 trips from 6:30 a.m. and 7:30 p.m.	11	\$3.59	\$532,628
	Road to Palomar College Transit				
	Center				
NCTD	347	Extend service from 7:00 p.m. to 9:00 p.m., weekdays.	6	\$7.34	\$44,913

#### Outlook for FY 2006 - A Focus on Efficiency

Due to the current budget deficit, there will be little or no additional FY 2006 operating funds available to implement the new services identified in this year's RSIP. In fact, service reductions and adjustments to MTS services may be required to help balance the FY 2006 operating budgets. Therefore, to balance transit operating budgets and implement any of the services identified in the FY 2005 RSIP, transit agencies must focus on increasing the efficiency of the existing services. NCTD completed its Fast Forward: Strategic Business Plan in 1999 to improve the efficiency of its services. MTS is conducting the COA to identify service efficiencies that will help reduce the operating budget. The following are strategies that will be considered in the COA and help increase regional cost-efficiency, achieve operating budget targets, and identify inefficient resources that can be reallocated to implement new services identified in the FY 2006 RSIP.

Service Reductions and Operational Efficiencies – Since FY 2003, MTS transit operators have had to reduce and refine services to implement operational efficiencies to stay within available operating funds. This trend is expected to continue for the next few years. In addition, further reduction of ineffective services can free resources to be used to implement more productive services identified in the FY 2006 RSIP. Service reductions should seek to minimize impacts on existing riders.

- Eliminate Duplication of Services At times, transit routes are developed that duplicate other services. This duplication results in lower efficiency and effectiveness since we are competing with ourselves for the same travel market. Therefore, duplicative services should be eliminated or restructured, and the resources from these services should be reinvested in new enhancement opportunities. Current examples of duplicative service include:
  - o Routes 980/990 and 860.
  - Routes currently serving the Sprinter alignment (existing services should be restructured in conjunction with the opening of this service).
  - o Downtown San Diego services.
  - o Fourth, Fifth, and Sixth Avenue services in San Diego.
- Specific Operator Performance Improvement Recommendations (PIR) As part of SANDAG's
  Transportation Development Act (TDA) Performance Improvement Program, each transit operator is
  required to develop annual recommendations for improving its performance and cost-efficiency. A list
  of the PIRs for FY 2005 implementation is presented in the technical appendix.

#### MOVING TOWARDS THE REGIONAL TRANSIT VISION

Due to financial constraints, the RTV Mobility 2030 transit network must be implemented in phases. The transit work program outlines SANDAG's short-term efforts to migrate existing services towards the RTV, and mid-term efforts to develop new services.

#### Migrating Existing Services Toward the RTV Concepts

Not only does improving the speed and schedule reliability of existing transit services begin to implement the concepts of the RTV, it has the greatest promise of enhancing service for existing riders as well as attracting new customers. Although many existing services provide a high level of transit access to major recreation and employment centers, they are often slow and unreliable due to traffic congestion and

frequency of bus stops. Using transit priority measures and appropriate bus stop planning, slow and unreliable transit services can be enhanced to provide a base level service consistent with the RTV.

Transit First Now! – The Transit First Now! program is designed to identify and develop strategies
that will allow existing transit services to bypass congested areas, speed up service, and make it
more reliable. Implementation of these strategies will help initiate the RTV using existing services to
test and evaluate various concepts for broader applications. Transit First Now! strategies include
transit priorities and bus stop consolidation.

As mentioned in Chapter 4, priority measures such as signal prioritization, queue jumpers, HOV/managed lanes, conversion of freeway shoulders to transit lanes, and exclusive bus lanes allow bus service to maintain high speeds and reliable schedules through heavily congested areas. As part of the Transit First Now! project, we have identified key congestion hot spots that are currently impacting our services, and are evaluating priority strategies to address these congested areas.

In addition to costly priority treatments, SANDAG and the transit agencies are evaluating no-cost approaches to improving speed and schedule reliability, including the regional bus stop consolidation program. Since bus stop placement has a significant impact on the speed and reliability of service, proper bus stop location must strike a balance between access and efficiency. Bus stops should provide convenient and easy access to major destinations, at junctions with other routes for transfer opportunities, and in areas with high ridership. Although placing more stops along a route may improve access, too many stops negatively impacts quality of service, travel time, operating costs, productivity, and efficiency. Therefore, bus stops should be strategically placed to maximize access, while the number of stops along a route should be minimized to achieve greater operating speeds, efficiency, and quality of service. SANDAG and MTS have implemented a successful bus stop consolidation pilot project on Route 11 that will help in developing regional guidelines for bus stop planning.

#### **Develop New Services to Support the RTV**

A primary concept of the RTV is an enhanced system of corridor and regional services that act as high speed overlays to supplement the basic mobility provided by the existing transit service. The RTV also envisions a set of complementary neighborhood circulators that provide feeder services to corridor and regional services as well as internal community circulation. Together, these new services will provide the improvements necessary for transit to provide the level of mobility necessary to support the RCP. Transit First is the implementing strategy for the RTV.

To support the RCP, we must develop transit services that link efficient and "smart" land uses together to provide a competitive alternative to the personal automobile. Based on our market research, competing with the automobile requires an emphasis on speed, flexibility, and the customer's travel experience. Mobility 2030 outlines a system of enhanced corridor and regional services that complement our existing transit network by providing fast, flexible, and pleasant transportation between urban centers and along major employment, retail, and commercial corridors. These services are designed to attract new rider markets by making transit a "first choice" for many trips.

Currently, two types of higher-speed services are provided as part of the region's transit system. The first type is the Regional Services. The purpose of these services is to provide fast and direct service from residential areas to major employment centers. As such, they operate primarily during weekday peak hours. To increase speeds and provide point-to-point service, few stops are provided between the origin and destination of the route. Regional Services are an important component of the transit system,

particularly as people move further away from their jobs, or when distinct urban centers begin to emerge throughout the region under the RCP. However, they are generally expensive to operate, due to low passenger turnover and high mileage, and are provided sparingly, only during the times and days they are most needed. The Coaster commuter rail service and I-15 express services (Routes 810, 820, 850, 860, and 870) are examples of Regional Service.

The second type of higher-speed service is Corridor Services. Unlike Regional Services, these routes act as a higher-speed overlay to local service operating along major employment, retail, and commercial corridors with travel destinations distributed evenly along the route. Corridor Services generally share stops with its complementary local service. However, the stops are limited, but evenly distributed, along the entire length of the route to provide faster service along the corridor. These services operate throughout the day and often on weekends. The Blue and Orange Trolley lines and Routes 30 and 50 are examples of Corridor Services.

Under the RTV and Mobility 2030, Regional and Corridor services will be enhanced to provide the speed, flexibility, level of service, and amenities that are needed to better compete with the private automobile. Through transit priorities and as described in Chapter 4, these services will provide similar, if not faster, travel times compared to driving alone. Advanced technology will improve the customer's travel experience through amenities such as real time vehicle location, enhanced customer information vehicles and at stations, automated fare collection, and advanced vehicle design. Station enhancements will provide a safer, more attractive, and pleasant waiting environment for our customers. Finally, greater frequency of service operating throughout the day and week will provide the flexibility to make transit a viable transportation option for San Diegans.

Although SANDAG is developing long-range plans for the full RTV network of regional and corridor services, the following mid-term Mobility 2030 services currently being developed will be the first applications of the RTV concepts. These transit projects and services are included in Program of Projects Expenditure Plan in the *TransNet* sales tax extension approved by San Diego County voters in November 2004. As these projects are implemented, existing duplicative services should be restructured to provide complementary feeder and collector service, or to address an unmet need.

Showcase Project – This project is designed to showcase the full Transit First customer experience
that includes new-design vehicles, upgraded stations, transit priority treatments, a close integration of
transit into land use planning around stations, level boarding, smart card fare collection, and real-time
passenger information technology. The Showcase Project is intended to provide an example of, and
generate support for, the comprehensive RTV network of services, as well as provide a "laboratory"
for testing and learning how to achieve the RTV experience.

The Showcase Project will be operated between San Diego State University and downtown San Diego via El Cajon and Park Boulevards. The service is expected to operate from early morning to late at night, every ten minutes on weekdays and weekends. SANDAG and the City of San Diego are working on a planning and preliminary engineering analysis of the Showcase Project, in addition to preparing an environmental document and an operating plan. The service is expected to be initiated in the next 3-5 years.

I-15 Managed Lanes/Bus Rapid Transit (BRT) Project — Caltrans and SANDAG are jointly working
to develop the North I-15 Managed Lanes/BRT facility between SR 163 and SR 78. This project will
include the construction of a four lane, bi-directional managed lane facility in the freeway median that
will grant priority access to carpools and BRT services. A series of direct-access ramps will connect
the managed lanes to BRT stations located in Mira Mesa, Sabre Springs, Rancho Bernardo, South
Escondido, and downtown Escondido.

This project will provide the capital facilities to operate regional services along the increasingly congested I-15 corridor. The design of the stations will also be enhanced, and automatic fare collection and real-time passenger information will be provided. As construction of this project nears completion<sup>7</sup>, SANDAG will work with the region's transit agencies to develop an operating plan and purchase vehicles to provide fast, reliable, and flexible service along this corridor.

Construction of the Managed Lanes between SR 56 and Center City Parkway began in summer 2004 and is scheduled to be competed by the end of 2007. Final design for three of the BRT stations is nearing completion (Del Lago/South Escondido, Rancho Bernardo, and Sabre Springs/Penasquitos) and construction is scheduled to begin between spring and fall 2006. They would begin operation when the Managed Lane project is completed.

- Super Loop The Super Loop will provide enhanced circulation in the heart of University City connecting University of California, San Diego (UCSD) and University Towne Centre (UTC) and Transit Center. In addition to internal circulation, the Super Loop will provide a core distribution service for other existing and planned transit services in the area. The Super Loop Project includes construction of stations and implementation of priority treatments. A Request for Qualifications process for a consultant to perform Preliminary Engineering and environmental documentation will be issued in early 2005.
- South Bay BRT Project As a result of increased border traffic from Mexico and the rapid growth in South Bay (particularly eastern Chula Vista), SANDAG is currently working with Caltrans, local jurisdictions, and developers to implement a South Bay to downtown San Diego BRT project. This service is initially anticipated to extend from downtown San Diego to eastern Chula Vista with an ultimate connection to the Otay Mesa border crossing. The service will use the right-of-way dedicated along East Palomar Road in Otay Ranch to provide a vital link between the transit-oriented residential development and the employment, retail, and entertainment destinations in downtown San Diego.

SANDAG awarded a contract in July 2003 to conduct advanced planning and preliminary engineering for the South Bay BRT Project. In addition, this project is a candidate for application of the freeway transit shoulder lane concept in the interim until the I-805 managed lanes are constructed.

Escondido BRT/Transit Priority Study – SANDAG, in cooperation with NCTD and the City of
Escondido, will conduct a preliminary study in spring 2005 to develop, screen, and recommend the
appropriate transit priority measures for NCTD Route 350. This six-mile route operates between the
Escondido Transit Center in downtown Escondido and Westfield Shoppingtown–North County
shopping mall. Measures to be evaluated include traffic signal priority for transit vehicles, queue
jumpers to give the bus an advantage at congested intersections, and dedicated lanes to increase
transit's competitiveness and reliability.

Route 350 carries more than 2,100 riders each weekday and is one of the more heavily used NCTD routes. Weekday service runs every 15 minutes and the route suffers from congestion in key locations during the morning and evening commute periods. The route serves several major activity centers including the Westfield Shoppingtown–North County shopping mall, San Pasqual High School, Bear Valley Middle School, the downtown Escondido area, and the transit center (which will be the terminus for SPRINTER light rail service beginning in 2007). A future focus will be to conduct advanced planning/preliminary engineering on the recommended transit priority measures in FY 2006.

<sup>&</sup>lt;sup>7</sup> Full project completion anticipated in 2010 with usable segments complete in 2007.

In addition to the corridor and regional services described above, SANDAG and the region's transit agencies are planning and constructing three new rail lines to extend the network of rail service in the region.

Mission Valley East Light Rail (Trolley) Extension – The Mission Valley East light rail extension will close the gap between the existing San Diego Trolley Blue Line at Mission San Diego and the Orange Line at the Grossmont Transit Center. When completed, this extension will create a light rail loop around the greater San Diego metropolitan area bordered by I-8 to the north, SR 94 to the south, SR 125 to the east, and I-5 to the west. Direct service will be provided to San Diego State University, as well as between east county suburban communities and Mission Valley, Old Town, and the coastal communities adjacent to Mission Bay.

This project has been under construction since 2000, and is anticipated to be completed and open for service in mid-2005. The project includes a tunnel and underground station at San Diego State University that will serve to provide front door access to the university and adjacent redevelopment projects. Bus services in the corridor will be restructured to support the new rail line and enhance access to the surrounding communities.

- Sprinter Rail Line The Sprinter rail line will provide fast and reliable service between Oceanside and Escondido along the SR 78 corridor. Once completed, 15 new stations will be constructed, including a station at Cal State University in San Marcos. The Sprinter is anticipated to relieve the growing congestion along the SR 78 corridor as well as providing east/west connections to north/south regional services such as the Coaster, Amtrak, Metrolink, and regional bus service. NCTD has awarded the construction contract and materials are being ordered and delivered. The Sprinter is scheduled to begin operations in December 2007.
- Mid-Coast Light Rail Line The Mid-Coast Line would extend from the Old Town Transit Center
  along the I-5 corridor to UCSD and University City. With the passage of the *TransNet Extension*,
  planning and engineering will be resumed for this project. The existing environmental clearance for
  the first segment to Balboa Avenue will be reevaluated, and preliminary engineering and
  environmental clearance will be undertaken for the line north of Balboa Avenue. Consultant selection
  activities will begin in early 2005.

#### **Neighborhood Services**

While regional and corridor service provides the backbone to the future transit network, a system of neighborhood circulators must be developed to provide feeder service to and from the regional services. Neighborhood services should also provide convenient community circulation to local and regional trip attractions. The following are services that are currently being developed to enhance neighborhood circulation.

• Downtown Circulators – To better coordinate transportation and land use planning, SANDAG and the Centre City Development Corporation (CDCC) conducted a Downtown Comprehensive Transit Study to develop a new transit service and operating strategy for downtown San Diego. Central to the transportation needs of the project area is better internal circulation to link the various neighborhoods and attractions of downtown San Diego. The results of the study have been incorporated into CCDC's community plan update. Included in the proposals is a loop shuttle that could run on Ash, A, 13<sup>th</sup>, and Market Streets, and Kettner Boulevard. The alignment is expected to be refined and could change as implementation planning takes place. Also included in the plan is a proposal for a local shuttle

between various downtown locations and Balboa Park. The COA currently being conducted by MTS will also consider downtown transit operations and some of the services may be restructured to provide more of a circulator function.

- Pacific Beach/Mission Bay Circulator Pacific Beach and Mission Bay are home to many of San Diego's finest regional attractions, including SeaWorld, Belmont Park, Garnet Avenue, and the beach. Convenient connections from Old Town Transit Center to these destinations have been identified as unmet needs through the long-range transit development plan for the north bay and beach area. The completion of the Mission Valley East light rail extension will also increase transit demand between Pacific Beach, with a large student population, and SDSU via Old Town. Finally, redevelopment activities at the Sports Arena and Midway provide additional opportunities for transit demand and transit/land use coordination. MTS and SANDAG are currently developing service concepts to address the transit needs in the north bay and beach area, including a circulator connecting Old Town with the attractions of Pacific Beach.
- Nobel Coaster Station Feeder Service A new Coaster station is planned at Nobel Drive in the
  UTC area. When completed, this station will provide new opportunities for Coaster passengers
  accessing destinations in the UTC area, as well as University City residents accessing Coaster
  destinations in North County. SANDAG has completed a Nobel Coaster station bus feeder study to
  identify opportunities to provide feeder service to and from the Coaster station with existing as well as
  proposed new services.
- Poinsettia COASTER Station Reverse Commute Shuttles NCTD has implemented two reverse commute shuttles (Routes 444 and 445) providing reverse commuter opportunities from San Diego to work in the Palomar Airport Road corridor. These shuttles have been in operation since January 2003.
- Carlsbad Station COASTER Connection NCTD plans to implement a new service in May 2005
  linking eastern Carlsbad with the Carlsbad Village COASTER Station. The purpose of the service is
  designed to relieve parking congestion at the station as well as expand ridership.

#### Marketing and Public Information

An important component of the successful implementation of transit projects will be the execution of branding and marketing programs. The communications and marketing tactics selected will be implemented in stages, and will be directed at progressively larger audiences as projects unfold, effectively increasing awareness and understanding of the program among elected officials, community stakeholders, and the public at large. A specific branding program developed under the Transit First strategy will help translate the goals of the RTV "customer experience" into vehicle and station designs. With the consolidation of the transit agencies and SANDAG, regional marketing activities are now a SANDAG responsibility. However, SANDAG should work with the transit agencies in marketing transit for local and community services, subareas and niche markets.

As a complement to the marketing program, we must be effective in disseminating information to the public. We should employ various media that have the greatest impact on capturing the largest audience. Signage at stations and on vehicles should be clear and concise and direct riders to their services as effectively as possible. Finally, information on all of our services should be provided in appropriate languages based on the specific service area audience.



#### **Regional SRTP Overview**

- √ Supports RCP and RTP
- √ Guided by Policy No. 18
- ✓ Prepared in Coordination with MTS & NCTD
- ✓ Grounded in Goals & Objectives Approved in December
- ✓ Modest Improvements Due to Constrained Funding

SANDAG

#### Recommendation

- √ Receive Presentation from SANDAG on the Draft RSRTP
- **✓ Provide Comments**

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### **RSRTP Contents** √ 1 – Introduction √ 2 - Strategic Vision √ 3 – Regional Travel Demand √ 4 - Existing Transit System √ 5 – Goals & Objectives √ 6 – Unmet Needs and Service Proposals SANDAG **Transit Needs & Deficiencies ✓** Direct Routings **✓** Community Services ✓ Late Night/Weekends **√**Operational ✓ Interjurisdictional SANDAG Service Proposal Development/Implementation **Needs & Deficiencies Service Proposals Establish Improvement Priorities SANDAG Consistency Determination Transit Agency Implementation**

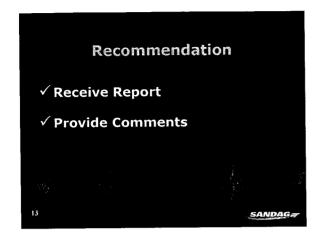
### FY 2006 Regional Service **Implementation Plan** √ Operating Funds Relatively Stable √ Fine Tuning the System √ More Substantial Changes Next Year from the MTS COA SANDAG. **FY2006 Service Changes** MTS √ Mission Valley East Connections √ Improved Service Frequencies ✓ New Service in San Ysidro/Otay Mesa SANDAG **FY2006 Service Changes** NCTD √ Improved Service Frequencies √ Extended Hours ✓ Added Coaster Connection Trips ✓ Coaster Rail2Rail and Petco Park ✓ New Circulators

SANDAG,

# Transit Priority Treatments Traffic Signal Priority Physical Treatments Use of Shoulder Lanes Future BRT Future BRT

Studies	
✓ COA	
✓ Mid-City Network Plan	
√ University Avenue Mobility Plan	
√ Carmel Valley/Del Mar Heights	

## Review & Approval Schedule V March 14 Notice of Public Hearing V March 17 NCTD Board V March 24 MTS Board V April 15 Public Hearing and Plan Adoption V April 29 Final RSRTP and Distribution





	Transit Development Goals & Objectives	
	✓ Regional System Development	
	✓ System Productivity	
	✓ Capital Investment	
	✓ Network Connectivity	
	✓ Travel Demand	
	✓ Customer Experience	
	✓ Smart Growth	;
	✓ Financial Sustainability	
15	SANDAG	,

# Regional Consistency Determination Checklist Criteria Yes No Requires Unbudgeted Operating Subsidy or Funding Reallocation Addresses a Known Gap or Deficiency Effect on Network Connectivity Meets Performance Standards Effect on Major Capital Facility (e.g., Transit Center or Rail Line Advance & Support Smart Growth Consistent w/SANDAG Plans & Policies

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#### **Direct Routings**

Mid-City to Mission Valley; Euclid to National City; South Bay to Old Town/Fashion Valley; La Jolla to Old Town/Downtown San Diego

#### **Community Services**

San Elijo Hills; National City; San Ysidro; Downtown San Diego; North Park; Beaches

#### Late Night/Weekends

Express Routes; Coaster; Overall

#### Operational

Overcrowding; Timed Transfers; I-15 Schedule Coordination

#### Interjurisdictional

Carmel Valley/Del Mar Heights; Temecula to Escondido

SANDAG

# Service Evaluation Matrix Table 1.6 Performer Completency on PLATTY Date and Objective | Property | Property

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	SAN DIEGO METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS
	REQUEST TO SPEAK FORM AGENDA ITEM NO.
	ORDER REQUEST RECEIVED
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	**PLEASE SUBMIT THIS COMPLETED FORM (AND YOUR WRITTEN STATEMENT) TO THE CLERK OF THE BOARD PRIOR TO DISCUSSION OF YOUR ITEM
	A Did not something
	1. INSTRUCTIONS
	This Request to Speak form must be filled out and submitted in advance of the discussion of your item
	to the Clerk of the Board (please attach your written statement to this form). Communications on hearings and agenda items are generally limited to three (3) minutes per person unless the Board
	authorizes additional time. However, the Chairperson may limit comment to one or two minutes each if
	there are multiple requests to speak on a particular item. General public comments on items not on the agenda are limited to three (3) minutes. Please be brief and to the point. No yielding of time is
	allowed. Subjects of previous Hearings or agenda items may not again be addressed under General
	Public Comments.
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	Organization Represented (if any)
	Subject of your remarks: Den) attached (RE3 A I 3)
	Agenda Item Number on which you request to speak QoQQ
	Your comments are presenting a position of: SUPPORT Property OPPOSITION
	2. TESTIMONY AT NOTICED PUBLIC HEARINGS
	At Public Hearings of the Board, persons wishing to speak shall be permitted to address the Board on any issue relevant to the subject of the Hearing.
	3. DISCUSSION OF AGENDA ITEMS
	The Chairman may permit any member of the public to address the Board on any issue relevant to a particular agenda item.
	4. GENERAL PUBLIC COMMENTS ON MATTERS NOT ON THE AGENDA
1	Public comment on matters not on the agenda will be limited to five (5) speakers with three (3) minutes each, under the Public Comment Agenda Item. Additional speakers will be heard at the end of the Board's Agenda.

\*\*REMEMBER: Subjects of previous Hearings or agenda items may not again be addressed under General Public Comments.\*\*

DGunn/SStroh / FORMS REVREQFO.DGUNN — 10/15/03

### 1. March 24, 2005 MTS mtg. SENDO ITEM #31 (Short Bongo Tropoit Blog

AGENDA ITEM #31 (Short Range Transit Plan)

Chairman Williams, Board members, Staff, and other fellow citizens. Chuck Lungerhausen of 5308 Monroe Ave. #124 which is in the SDSU neighborhood of San Diego. 92115 Phone 619-546-5610

Am looking forward to serving on the Comprehensive Operational Analysis Blue Ribbon Subcommittee because transit is my only way around this region. All of you on the MTS board get here by car and I often wonder how different your decisions would be if all of you were in a situation similar to mine.

1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX: 619.234.3407

#### **Agenda**

Item No. <u>32</u>

AG 250 (PC 30100)

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc.

March 24, 2005

Subject:

MTS: AUTHORIZATION FOR USE OF CITY OF SAN DIEGO BILLBOARD RESERVE FUNDS

#### RECOMMENDATION:

That the Board of Directors approve the proposed concept plans for landscaping improvements at the Euclid Avenue, 47th Street, and Encanto/62nd Street Stations and authorize the release of up to \$200,000 from the City of San Diego Billboard Reserve Fund to the City of San Diego for a final design, construction, and landscape improvements at those stations in City of San Diego Council District 4.

#### Budget Impact

\$200,000 from the City of San Diego Billboard Reserve Fund. The balance remaining in this fund would be approximately \$44,581.

#### **DISCUSSION:**

In 1979, MTS acquired the San Diego and Arizona Eastern (SD&AE) Railway Company from Southern Pacific Railway. SD&AE was converted to a Nevada nonprofit corporation and is the landholder of the railroad from San Diego to San Ysidro and San Diego to El Cajon. That railroad line was developed for light rail passenger service and is now known as the San Diego Trolley. During the course of the construction of the



line to San Ysidro, 40 signs and billboards were removed from the railroad right-of-way without compensation paid to the billboard owners (Gannett Outdoor Company and Metromedia, Inc.). Of the 40 signs removed, 13 were located in the City of San Diego. Litigation ensued, and a settlement was proposed whereby MTS would seek permission from various cities to install up to 6 larger billboards along the railroad right-of-way. The City of San Diego agreed to allow 1 sign to be placed in the right-of-way adjacent to Interstate 15 (I-15) located in Council District 4, 25 feet north of Imperial Avenue. The lease was signed on January 15, 1987, and consisted of a 15-year term at the rate of \$4,100 per year.

At the same time, billboard reserve funds were created by MTS for the exclusive use by the cities where the billboards were placed. The reserve monies are funded by the lease revenue generated by the billboard owners and may be used by the cities for purposes which have a clear nexus to mass transit, such as landscaping along the right-of-way, graffiti and litter removal, and pedestrian improvements. In order to access reserve fund monies, a city must submit a written request to MTS. The request must include a description of the qualified project, the amount of funds requested, and a schedule for expenditure. Each request is subject to approval by the Board and the city making the request.

In January 2000, the lease agreements for the City of San Diego's billboard were amended with the lease term beginning on April 1, 2000, and expiring on March 31, 2015. The rent for the billboard was set at \$25,000 per year payable monthly. The current value of the City of San Diego billboard reserve account is approximately \$254,000.

#### City of San Diego's Proposal for Utilizing the Billboard Funds

The City of San Diego has identified the following areas for proposed improvement:

- 47th Street Station
- Euclid Avenue Station
- Encanto/62nd Street Station

The City of San Diego is recommending a landscape plan that will focus on installing hardy, drought-tolerant, low-maintenance, indigenous plants, trees, and shrubs, which require minimal water use and maintenance beyond the plant establishment period. The landscape plan also addresses drainage needs, designs an irrigation system, creates hardscape, including improved pedestrian access by adding pathways and displaying public art, and controlling and removing graffiti.

Currently, landscaping and hardscaping improvements located at transit and trolley stations are funded with capital project monies when the center is initially created. Depending upon the particular station, maintenance responsibilities are usually performed by San Diego Trolley, Inc.'s (SDTI's) facilities and wayside maintenance departments. SDTI has a limited maintenance budget that must be utilized for all station maintenance. Therefore, the City of San Diego's plan emphasizes improvements that require little or no maintenance.

On December 11, 2003, the Board authorized the City of San Diego to spend up to \$20,000 on preliminary design and engineering for this project. The City of San Diego has spent \$10,965.45 so far.

The City of San Diego is proposing the following budget for the completion of the project:

Description	Amount
Design/Admin	\$12,669.08
Development Services	\$1,306.16
E&D Trans Plan	\$174.19
Consultant Design Cost	\$15,000.00
Basic Construction Cost	\$129,210.60
Minor Items (5%)	\$6,460.53
Mobilization (10%)	\$12,921.06
Contingencies (10%)	\$12,921.06
Bond Cost (2.5%)	\$3,230.27
Field Order (10%)	\$12,921.06
Remaining Engineering and Admin (10%)	\$12,921.06
Total Project Cost	\$219,735.07

(Note: total project cost of \$219,735.07 includes the \$20,000 previously authorized by the Board for preliminary design and engineering.)

At this time, staff is recommending the Board approve the proposed concept plans for landscaping improvements at the Euclid Avenue, 47th Street, and Encanto/62nd Street Stations and authorize the release of up to \$200,000.00 from the City of San Diego Billboard Reserve Fund to the City of San Diego for final design, construction, and landscape improvements at those stations in City of San Diego District 4. Mike Arnold, Associate Engineer for the City of San Diego, will be present at the meeting to answer any questions.

Paul C. Jablonski Chief Executive Officer

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Key Staff Contact: Tiffany Lorenzen, 619.557.4512, Tiffany.Lorenzen@sdmts.com

JGarde MAR24-05.32.TLOREN 3/16/05

Attachment: A. Proposed plantings by station

B. Landscape Cost Analysis

C. MTS Station Improvements Cost Analysis



#### MTS Station Improvement Project Plantings by Station 2.25.05

#### 47<sup>th</sup> Street

- Evergreen Flowering Accent Trees Cassia leptophylla "Gold Medallion Tree"
  - Size: 20' high x 20' wide
  - Water: lowHardiness: 28F
  - Appeal: long summer bloom of bright yellow flowers
  - Maintenance: Prune to shape first 3 years, prune to reduce every 2 years thereafter.
- Evergreen Screening Trees Eucalyptus citriodora "Lemon Scented Gum"
  - Size: 80' high x 25' wide
  - Water: lowHardiness: 28F
  - Appeal: graceful, narrow form, non-invasive roots
  - Maintenance: Prune to shape first 3 years, prune to reduce every 3 years thereafter.
- Evergreen Shade Trees Cupaniopsis anacardioides "Carrotwood"
  - Size: 30' high x 30' wide
  - Water: low
  - Hardiness: 28F
  - Appeal: looks good in any soil, takes neglect
  - Maintenance: Prune to shape first 3 years, prune to reduce every 3 years thereafter.
- Evergreen Flowering Groundcover Lantana montevidensis "Spreading White, Spreading Sunshine, Purple Lantana"
  - Size: 2' high x 8' wide
  - Water: low
  - Hardiness: 20F
  - Appeal: All year bloom of bright flowers, low growth
  - Maintenance: Cut flat every 3 years to remove woody build-up
- Evergreen Flowering Groundcover Oenothera berlandieri "Mexican Evening Primrose"
  - Size: 1' high x 3' wide
  - Water: low
  - Hardiness: 12F
  - Appeal: Spring to fall bloom of bright pink flowers, low growth, resilient due to underground rhizomes.
  - Maintenance: Cut back tips annually after bloom.

#### Evergreen Vines – Macfadyena unguis-cati "Cat's Claw Vine"

- Size: 25'

- Water: low to moderate

- Hardiness: 28F

- Appeal: spring bloom of bright yellow flowers, roots where it touches soil.
- Maintenance: Cut back trailing branches annually.

#### 62<sup>nd</sup> Street / Encanto

- Evergreen Massing Trees Melaleuca quinquinervia "Cajeput Tree"
  - Size: 30' high x 20' wideWater: low to moderate

Hardiness: 28F

Appeal: looks good in any soil, takes neglect

- Maintenance: Prune to shape first 3 years, prune to reduce every 3 years thereafter.

#### Evergreen Flowering Groundcover - Oenothera berlandieri "Mexican Evening Primrose"

- Size: 1' high x 3' wide

- Water: low - Hardiness: 12F

- Appeal: Spring to fall bloom of bright pink flowers, low growth, resilient due to underground rhizomes.

- Maintenance: Cut back tips annually after bloom.

#### **Euclid Avenue**

 Evergreen Massing Trees – Geijera parvifolia "Australian Willow"

- Size: 30' high x 20' wide

Water: lowHardiness: 15F

Appeal: deep, non-invasive roots, willow form

- Maintenance: Prune to shape first 3 years, prune to reduce every 3 years thereafter.

#### Evergreen Vines – Jasminum polyanthum "Jasmine"

- Size: 20'

Water: low to moderate

Hardiness: 18F

Appeal: year-round bloom of fragrant bright rose flowers.

 Maintenance: Cut back every 5 years to remove woody buildup.

#### Evergreen Shrubs – Dietes bicolor "Fortnight Lily"

- Size: 3'x 2'

Water: moderateHardiness: 18F

Appeal: spring-fall bloom of bright yellow flowers.

Maintenance: Remove spent flower stems annually.

#### Evergreen Flowering Groundcover - Oenothera berlandieri "Mexican Evening Primrose"

Size: 1' high x 3' wide

- Water: low

- Hardiness: 12F

 Appeal: Spring to fall bloom of bright pink flowers, low growth, resilient due to underground rhizomes.

- Maintenance: Cut back tips annually after bloom.

TOTAL

#### LANDSCAPE COST ANALYSIS

#### Design Development submittal dated 9/16/2004

MTS Trolley Stations Improvements
Date: 9/29/2004

	ITEM	QUANTITY	UNIT	UNIT COST	TOTAL COST
	47th Street				
1	Sawcut/remove 4"conc. paving	209.00	SF	\$2.40	\$501.60
2	Relocate existing entry sign	1.00	LS	\$500.00	\$500.00
3	Install trash receptacles	6.00	EA	\$800.00	\$4,800.00
4	Construct concrete seat bollards	21.00	EA	\$225.00	\$4,725.00
5	Plant 36" box trees	2.00	EA	\$750.00	\$1,500.00
6	Plant 15 gallon trees	14.00	EA	\$130.00	\$1,820.00
7	Plant 5 gallon vines	10.00	EA	\$35.00	\$350.00
8	Plant 1 gallon groundcover	290.00	EΑ	\$6.75	\$1,957.50
9	Adjust existing irrigation	1.00	LS	\$5,500.00	\$5,500.00
10	Install 2" mulch	8.00	CY	\$60.00	\$480.00
					\$22,134.10
	62nd Street				
11	Construct cobble edge	525.00	LF	\$28.00	\$14,700.00
12		6.00	EA	\$800.00	\$4,800.00
13	Construct concrete seat bollards	14.00	EA	\$225.00	\$3,150.00
14		12.00	EA	\$750.00	\$9,000.00
15	· ·-··· · g-··· · g. · - · · · · · ·	280.00	EA	\$6.75	\$1,890.00
16	Adjust existing irrigation	1.00	LS	\$2,500.00	\$2,500.00
17	Install 2" mulch	15.00	CY	\$60.00	\$900.00
					\$36,940.00
	Euclid Avenue				
	Relocate existing steel fence	20.00	LF	\$25.00	\$500.00
19	<b>9</b>	446.00	SF	\$6.50	\$2,899.00
20	•	148.00	LF	\$18.00	\$2,664.00
21	•	3.00	EA	\$800.00	\$2,400.00
22		7.00	EA	\$225.00	\$1,575.00
23		37.00	· EA	\$750.00	\$27,750.00
24		970.00	EA	\$6.75	\$6,547.50
25	, ,	1.00	LS	\$7,500.00	\$7,500.00
26		45.00	CY	\$60.00	\$2,700.00
27	Refurbish existing mural	1.00	LS	\$19,000.00	\$19,000.00
					\$70,136.50

\$129,210.60

### MTS Stations Improvement Projects Cost Estimate

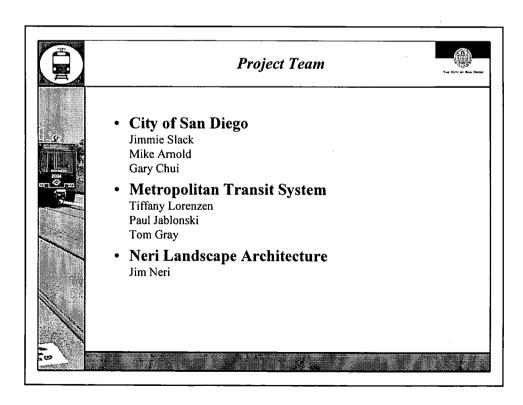
Description	Amount
Design /Admin	\$12,669.08
Development Services	\$1,306.16
E&D Trans Plan	\$174.19
Consultant Design Cost:	\$15,000.00
Basic Construction Cost	\$129,210.60
Minor Items (5%)	\$6,460.53
Mobilization (10%)	\$12,921.06
Contingencies (10%)	\$12,921.06
Bond Cost (2.5%)	\$3,230.27
Field Order (10%)	\$12,921.06
Remaining Engineering and Admin (10%)	\$12,921.06
Total Project Cost	\$219,735.07

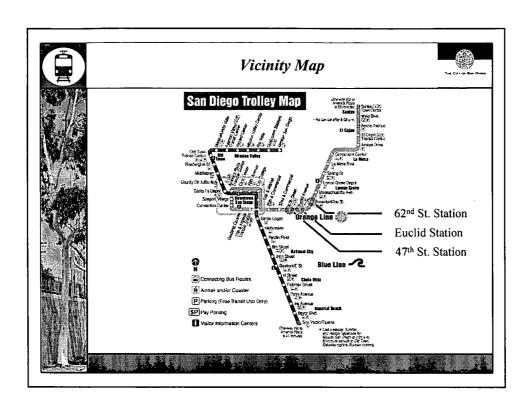


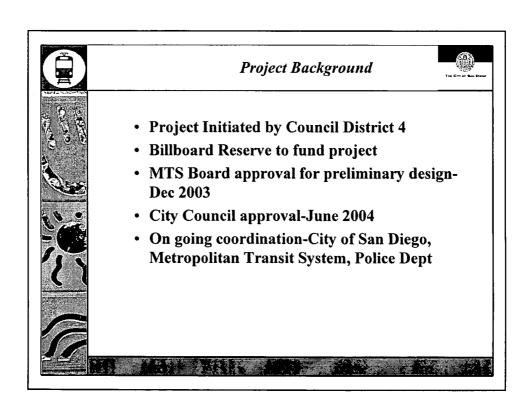
## MTS Station Improvement Project Presented to Metropolitan Transit System

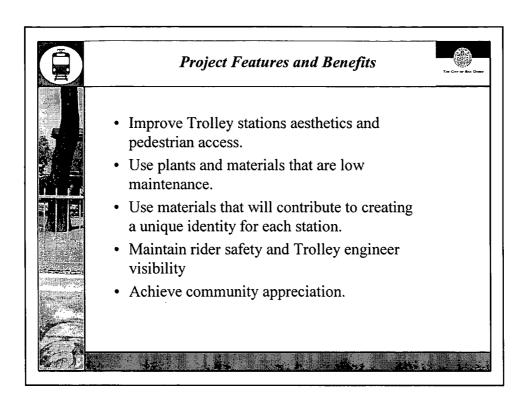
City of San Diego, Transportation & Drainage March 24, 2005

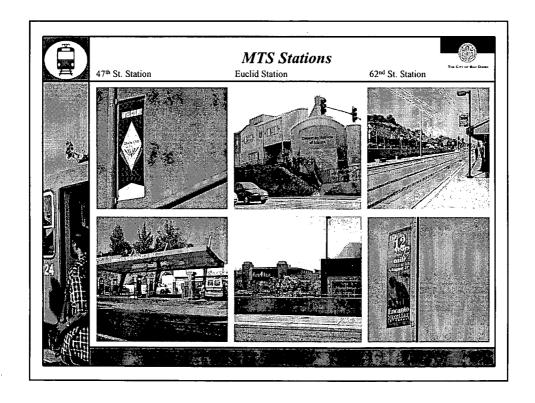


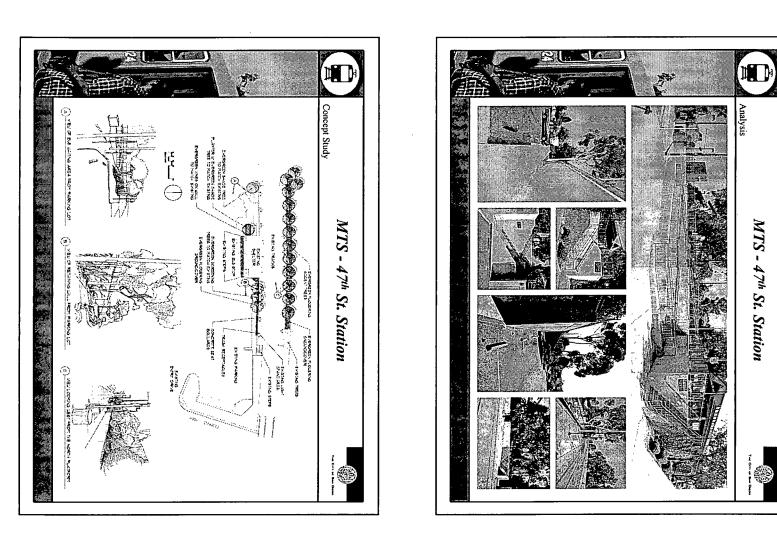


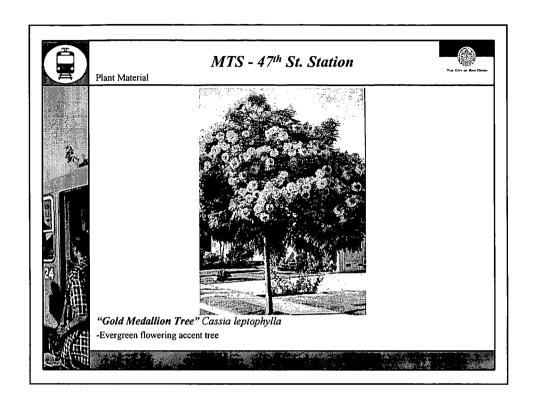


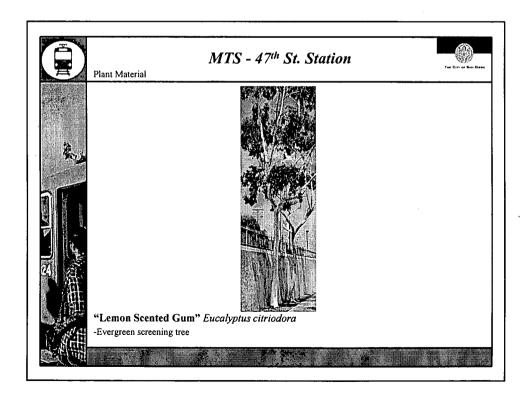


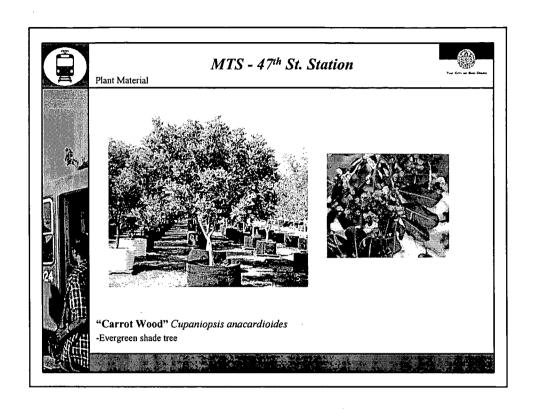


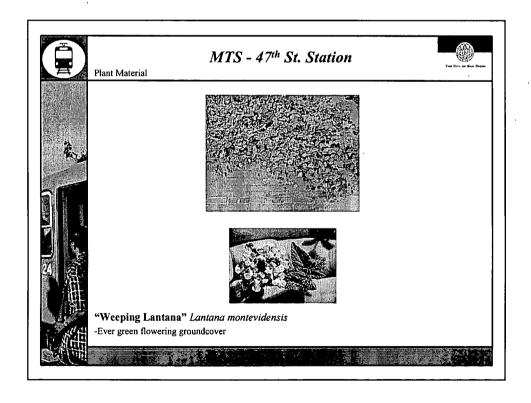


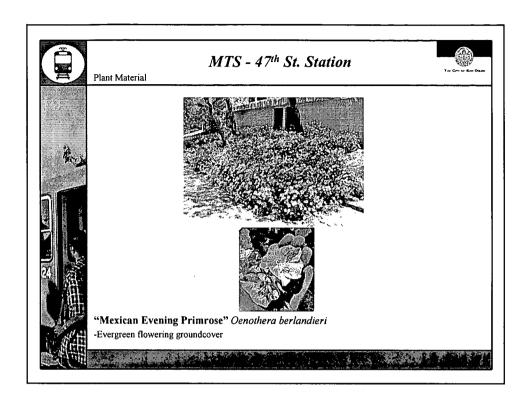


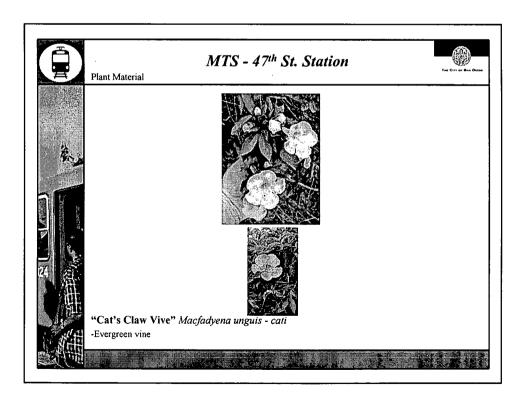


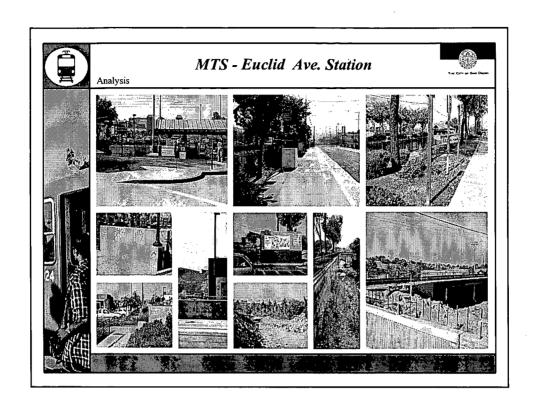


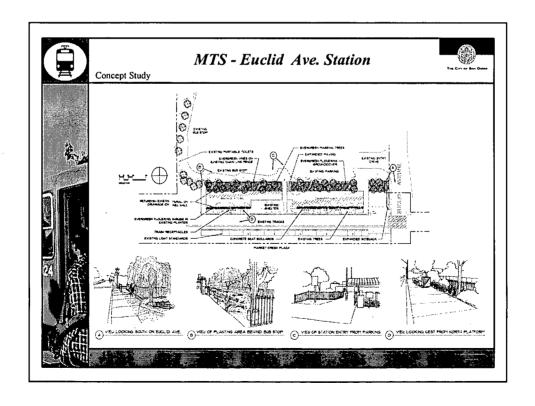


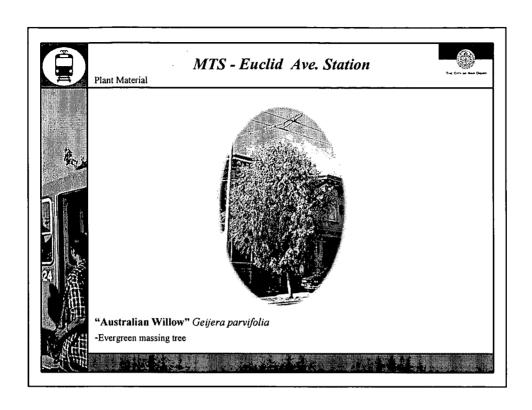


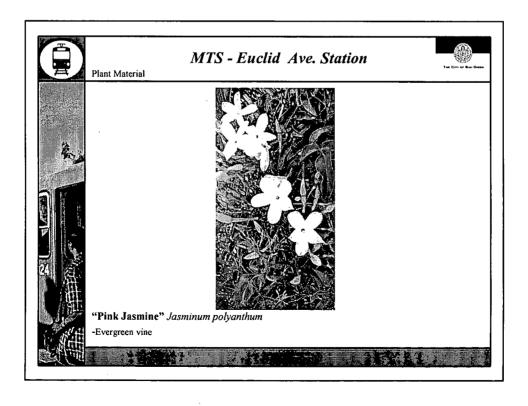


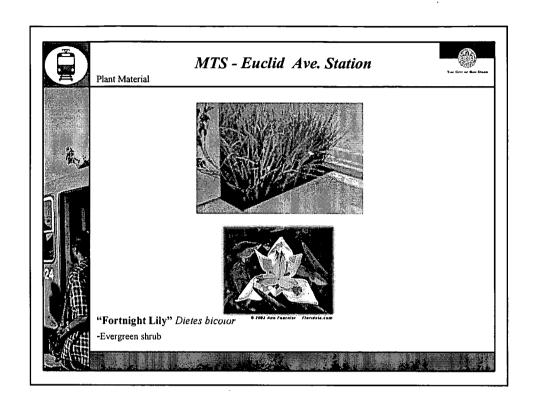


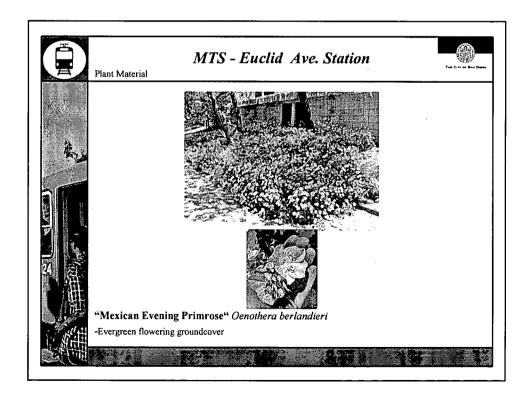


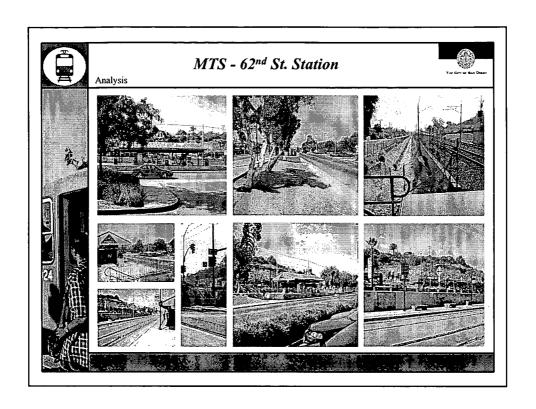


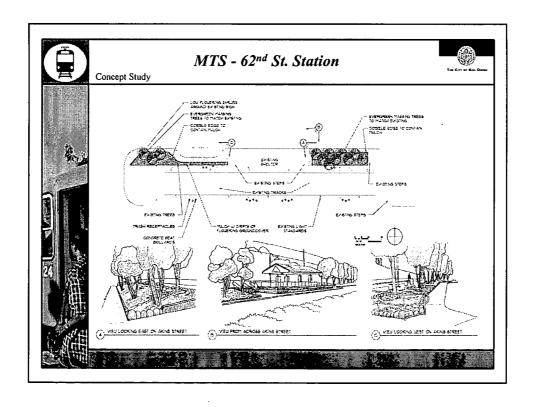


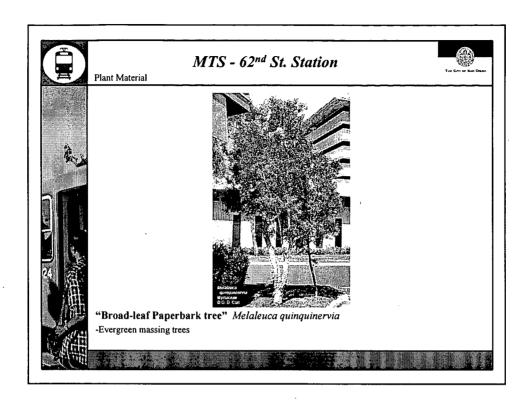


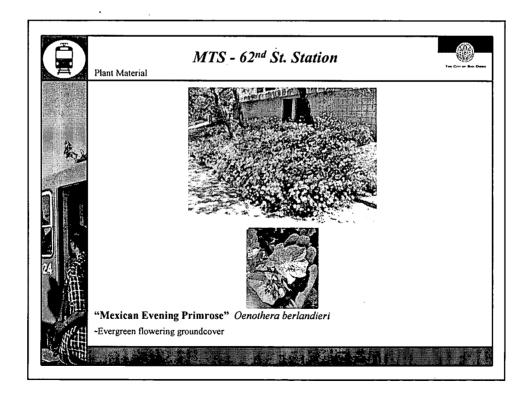


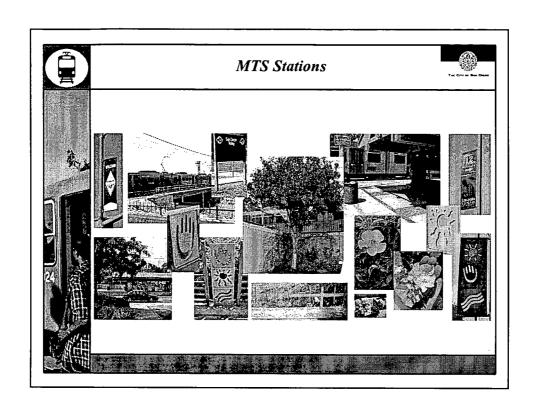


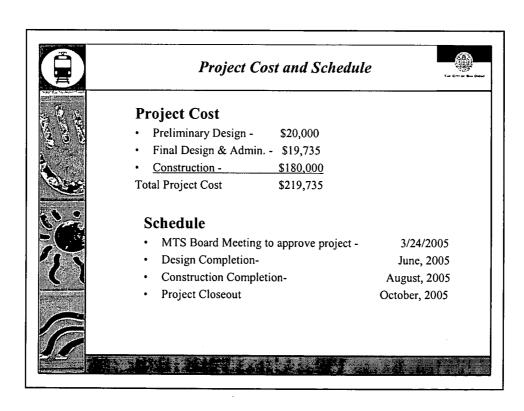














1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX: 619.234.3407

# Agenda

Item No. <u>33</u>

CIP 10426.13

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc.

March 24, 2005

Subject:

MTS: GREEN LINE OPENING DAY - TENTATIVE

#### RECOMMENDATION:

That the Board of Directors approve the tentative opening day for the Green Line and approve the Free Community Ride Day.

#### **Budget Impact**

The Board previously allocated \$400,000 for the start-up communications and marketing activities on December 9, 2004, as part of the FY 05 budget.

#### **Executive Committee Recommendation**

At its meeting on March 3, 2005, the Executive Committee recommended forwarding this item to the Board for approval.

#### **DISCUSSION:**

At its December 9, 2004, meeting, the Board approved the Final Marketing and Communications Plan for the Mission Valley East (MVE) Extension to develop a coordinated community outreach, which includes news media, special events, and a safety education program that will maximize opening day. MTS staff is now recommending that the tentative opening day of the new Green Line be on Friday, July 8, 2005, at 4:00 p.m. followed by a Free Community Ride Day on Saturday, July 9, 2005, from 10:00 a.m. to 3:00 p.m., with revenue operations commencing on Sunday, July 10, 2005. The reason for these dates is that Congress will be on recess at that time, and this would allow local government representatives to be present at this



important community landmark. Additionally, federal, state, and local authorities, and elected officials may find it easier to attend for the same reason. Staff has verified that these recommended dates do not interfere with any sports or civic events. This recommendation is made after discussions held by the MVE Project Start-up Committee and based on the status of the project, which is deemed to be approximately 96 percent complete. MTS staff will report any changes to the dates proposed above. MTS staff needs an approved date to send opening-day invitations to key elected officials as well as executive-level officials who would need to place them on their calendars in advance. More detailed information would be sent out in late May or early June 2005 to the invitees to reconfirm the date.

Paul C. Jablonski Chief Executive Officer

Key Staff Contact: Gonzalo Lopez, 619.557.4526, gonzalo.lopez@sdmts.com

JGarde MAR24-05.33.GLOPEZ 3/14/05



1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX 619.234.3407

# **Agenda**

Item No. 45

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. OPS 970.11 (PC 30102)

March 24, 2005

Subject:

MTS: 2004 YEAR-END SECURITY REPORT

#### **RECOMMENDATION:**

That the Board of Directors receive this report for information.

**Budget Impact** 

None.

#### DISCUSSION:

Statistics related to security incidents concerning the transit system are compiled by staff based on reports generated by security personnel and Code Compliance inspectors. This information is augmented by reports from local police authorities. This information is then compiled and summarized and submitted to the Board of Directors on a midyear and year-end basis. The final 2004 year-end report covers the period from January 1, 2004, through December 31, 2004.

#### C Street Corridor Project

In July 2003, the MTS Transit Enforcement Department was invited to participate in a Problem-Oriented Policing (POP) Project with local law enforcement agencies relative to the C Street Corridor.

This joint effort involved personnel from the Office of the City Attorney, the Probation Department, and the San Diego Police Department. The purpose of this project was to



address quality-of-life issues along the C Street Corridor by deterring criminal conduct and taking enforcement action, or obtaining stay-away orders, when necessary. Police radios were issued to Trolley Enforcement Officers to enhance communications between agencies and enable San Diego Trolley, Inc. (SDTI) staff to run warrant checks on suspected violators through San Diego Police dispatch. Narcotics transactions and usage, gang activity, and disorderly conduct were examples of conduct that was addressed.

In late 2004, a new city prosecutor was assigned to coordinate the C Street Corridor Enforcement Program and related crime issues. In meetings with our legal counsel and the city prosecutor, issues were identified relative to loitering laws. A resolution covering these issues and plans for enhanced signage specific to loitering are currently underway.

Aggressive enforcement continues in the area to further reduce crime and quality of life issues. Code Compliance and Security Officers concentrated on the Civic Center Station, the Fifth Avenue Station, and adjacent bus stops. Quality of life issues and fare evasion were addressed during this detail.

#### Other Joint Projects

In addition to the C Street POP Project, transit enforcement officers worked with San Diego Police during Operation Safe Crossing. Operation Safe Crossing is a combined effort of numerous law enforcement agencies to prevent youths under 18 years of age from entering Mexico without parental consent and to reduce driving under the influence (DUI), alcohol-related crashes and other alcohol-related crimes, and violence along the Tijuana/San Diego border region.

Collaboration with the San Diego Police Department Gang Unit took place during certain conventions (particularly the skateboard convention) to curtail vandalism on transit and city property.

Officers worked with the La Mesa Police Department for several truancy sweeps throughout the year as well as during the annual Oktoberfest.

From time to time, officers worked with El Cajon Police, the San Diego Sheriff's Department, and the Chula Vista Police Department to address the criminal element in those jurisdictions.

#### **Prisoner Bookings**

In June 2003, the San Diego Police Department and San Diego Sheriff's Department entered into an agreement with SDTI authorizing Code Compliance supervisors to process and book prisoners for felony or domestic violence warrants or public drunkenness refused by the Detoxification Center.

The overall evaluation of the booking procedure remains positive and worthwhile. There were 182 prisoner bookings during this reporting period compared to 106 for the same reporting period in 2003.

#### Training

During this reporting period, all Code Compliance Inspectors and Transit Systems Security Officers attended training sponsored by the United States Border Patrol that dealt with terrorist events involving ground transportation. Additional training conducted by the San Diego Sheriff's Department included the recognition and handling of incendiary devices and other bomb-related items.

Several Code Compliance Inspectors completed a 40-hour training course certified by the California Peace Officers Standards and Training (P.O.S.T.) Agency. Ongoing training includes courses sponsored by the Federal Bureau of Investigation (FBI) as well as continued P.O.S.T.-certified courses.

Legal updates and officer safety advisories, obtained through the District Attorney's Office and law enforcement agencies, are a regular part of the ongoing training program. Pertinent Homeland Security alerts relative to light rail and bus transportation are also distributed to officers when received.

#### Transit Enforcement Office – San Diego Transit Corporation Facility

As part of the ongoing effort to increase enforcement presence at San Diego Transit Corporation (SDTC), a security office was established at the Imperial Avenue Division. Code Compliance supervisors visited SDTC six times daily for approximately three hours per day. During this time, supervisors wrote reports using the computer in the office, met with officers, conducted perimeter checks, and met with various SDTC personnel. This helped build rapport and provide an avenue for SDTC personnel to ask questions or report issues of security concern to uniformed officers.

#### SDTC Security Survey

A security survey and vulnerability assessment of SDTC's Imperial Avenue Division was completed during 2004. The survey recommended short and long-term security solutions based on realistic probabilities, prioritizing them in concert with existing threat levels. The study addressed physical security, field operations, bus security, emergency preparedness, and disaster recovery.

#### Security Awareness Brochure

A security awareness brochure was developed in late 2004. It addresses crime prevention awareness amongst patrons by encouraging the riding public to report suspicious packages or people to uniformed personnel. The goal is to make patrons and employees aware that security is everyone's business.

#### San Diego Trolley, Inc. (SDTI)

Statistics compiled for calendar year 2004 indicate that reports of Part I incidents decreased moderately compared to 2003.

PART I INCIDENTS	<u>January – December 2003</u>	<u>January – December 2004</u>
Robbery	25	17
Theft	42	37
Aggravated Assault	18	11
Motor Vehicle Theft	26	18
Burglary	00	00
Arson	_00	<u>00</u>
TOTA	L 111	83

Arrests for nonfare related Part II offenses also declined overall.

PART II ARRESTS	January - December 2003	January - December 2004
Other Assaults	44	39
Vandalism	61	48
Sex Offenses	01	03
Drug Abuse Violation	s 235	292
D.U.I.	04	01
Drunkenness	172	119
Disorderly Conduct	612	686
Trespassing	380	145
Curfew and Loitering	<u> 156</u>	<u>105</u>
TOTĀI	1,665	1,438

Excluding fare evasion, there were 1,438 Part II arrests made during calendar year 2004, compared to 1,665 arrests made during calendar year 2003.

Fare evasion citations remained relatively constant at 23,964 in calendar year 2003 to 23,192 in calendar year 2004.

#### Passenger Inspections

During calendar year 2004, the inspection rate was approximately 28.39%:

Onboard Trains	Fare-Paid Zones	Total Passengers Inspected
4,021,037	4,148,510	8,169,547

Total Part I incidents per 100,000 passengers compare as follows:

	Passengers Carried	Part I Incidents/100,000		
January – December 2003	25,379,176	.44		
January – December 2004	28,772,441	.29		

Total Part II Arrests per 100,000 passengers is reflected below:

	Passengers Carried	Part II Arrests/100,000
January – December 2003	25,379,176	6.56
January - December 2004	28,772,441	5.00

In addition to the categories that appear on the Federal Transit Administration (FTA) Form 405, over 1,300 additional arrests were made for other violations occurring systemwide (SDTI, SDTC, and MTS), the majority of which involved alcoholic beverages.

Additionally, the San Ysidro bus loop and bus parking area were opened to bus and taxicab traffic in January 2004. Although adequate signage designating agencies authorized for use was posted, many private or unauthorized vehicles continued to enter these controlled areas, interfering with bus, taxicab, and sometimes trolley operations.

Private vehicles entering and parking in the bus loop, which is designated for specific commercial carriers only or pedestrians crossing in areas not designated for crossing, caused traffic to back up into the intersection, delaying vehicular and train movement. Initially, most of the persons contacted were warned verbally. During the first year, however, nearly 1,000 citations were issued to vehicles not authorized to park in these areas or to pedestrians for disregarding notices specific to crossing areas.

#### Special Enforcement Unit (SEU)

One hundred percent of passengers at specially selected trolley stations and on trains passing through these stations were inspected for fare compliance.

During calendar year 2004, inspectors and officers contacted 104,620 passengers during 30 scheduled SEU "sweeps" systemwide. Of the passengers inspected, 3,363 passengers did not comply with the published fare structure. Annual statistics from these special fare evasion inspections indicate a fare evasion rate of only 3.21%.

Of the 3,363 who were not in fare compliance, 1,765 were issued citations, 862 were allowed to purchase an upgraded fare in order to meet compliance requirements, and the remainder received verbal warnings. A total of \$1,610.65 in revenue was collected from patrons who were allowed to purchase or upgrade fares when found in noncompliance.

In addition to fare compliance, officers made arrests for quality-of-life violations, such as possession of alcohol and illegal substances.

#### Citation Revenue

While the annual number of notice-to-appear citations issued over the last several years has increased moderately, the amount of revenue generated or collected by the court system has increased significantly.

Officers have become more effective in obtaining better identification of suspects. Use of the Transit Watch database system as well as San Diego Police Department dispatch makes it possible to obtain more accurate suspect information at the time of arrest. Attachment A depicts the increase in citation revenue.

#### Multiagency Emergency Preparedness Drill

In July 2004, MTS performed an Emergency Preparedness Drill at the Bayfront/E Street Station. This exercise was videotaped, and the final edited product will be distributed to the participating agencies. The tape will also be made available to agencies that wish to learn how to create or design an emergency preparedness drill or for use in training to prepare for such events.

In June 2005, MTS and local emergency response agencies plan to perform another such drill at the San Diego State University (SDSU) Transit Center. As with previous drills, this drill will involve numerous emergency response agencies, hospitals, volunteers, law enforcement, and the media.

#### **Multiagency Training Manual**

This \$25,000 grant project builds upon the emergency preparedness drills that MTS and its operating agencies conducted in 2002-2004. A transit/trolley emergency preparedness training manual for use by SDTI, SDTC, and other agency staff will be developed based on the experiences of those who participated in previous drills. This manual will provide valuable experience and training for transit professionals that will enhance MTS's and its operators' ability to respond to emergencies.

#### Closed-Circuit Television (CCTV)

CCTV is presently functioning at the Old Town Transit Center (12 cameras), Euclid Avenue Station (8 cameras), Fashion Valley Transit Center (5 cameras), Qualcomm Stadium Station (16 cameras), 47th Street Station (5 cameras), and the El Cajon Transit Center (2 cameras).

Investigators from various law enforcement agencies have worked in concert with Code Compliance and security in reviewing archived video on crime activity. Two noteworthy cases occurred in 2004 wherein the system greatly aided the San Diego Police Department; a homicide near the 47th Street Station and a gang-related shooting at the Euclid Avenue Station. Earlier in the year, the CCTV system was again pressed into service and assisted San Diego Bomb Squad personnel with identifying a suspicious object left abandoned at the Fashion Valley Transit Center.

Enhancements to the program will include a 16-camera system located at the SDSU Transit Center and the Alvarado Medical Center Station. This system is scheduled to go on-line in late spring of 2005.

Cost estimates have been obtained for future installation in Chula Vista at the H Street, Palomar Street, and Bayfront/E Street Stations. The Spring Street Station in La Mesa and 8th Street and 24th Street Stations in National City are also being considered for 2005.

#### San Diego Transit Corporation

Statistics compiled for calendar year 2004 indicate that reports of Part I incidents against persons decreased significantly compared to calendar year 2003.

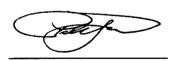
<u>INCIDENTS</u>	January – December 2003	<u>January – December 2004</u>		
Motor Vehicle Theft	01	00		
Robbery	06	03		
Theft	06	00		
Aggravated Assault	09	02		
Homicide	01	00		
Forcible Rape	<u>00</u>	<u>00</u>		
TOTAL	23	05		

Arrests for Part II offenses fell compared to previous years figures. Including fare evasion, there were 273 arrests for Part II offenses during calendar year 2003, compared to 197 arrests made during calendar year 2004.

PART II ARRESTS	<u> January – December 2003</u>	January - December 2004		
O	40			
Other Assaults	13	09		
Vandalism	40	27		
Sex Offenses	00	00		
Drug Abuse Violations	91	73		
D.U.I.	00	00		
Drunkenness	18	08		
Disorderly Conduct	40	31		
Trespassing	01	02		
Fare Evasion	17	06		
Curfew and Loitering	<u>53</u>	<u>41</u>		
TOTÁL	273	197		

#### **Contract Services**

MTS Contract Services experienced 36 Part II arrests and one report of a Part I incident for this reporting period. In 2003, there were 27 Part II arrests and one report of a Part I incident.



Paul C. Jablonski Chief Executive Officer

Key Staff Contact: Bill Burke, 619.595.4947, Bill.Burke@sdti.sdmts.com

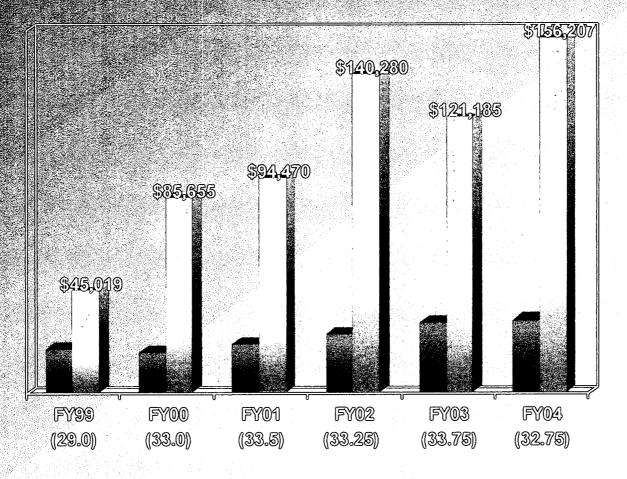
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Attachments: Citation to Revenue Comparison - FY 99 to FY 04

- B. Board FTA 405 Reports (January-December 2003 SDTI)
  C. Board FTA 405 Reports (January-December 2004 SDTI)
  D. Board FTA 405 Reports (January-December 2003 SDTC)
  E. Board FTA 405 Reports (January-December 2004 SDTC)

# Citation to Revenue Comparison

(Notice to Appear/Parking)



Citations Written

Revenue Collected

Number in parenthesis () = Number of Full Time CCI Employees



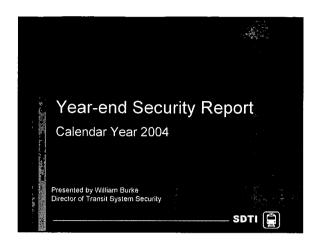


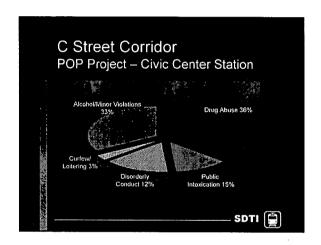
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йто по ППП					<u> </u>	Mode T
Form 005 Included						Mode
	Rec	ed on the Unifr	orm Crime Reporting Handbo	Yak		Type of Service
Security Ite			In Vehicle	In Station		Other Transit Prop.
						•
Location SDTI			1			
Part I Offenses (Reports)  Violent Crime	Inc Inv	Arrests				
Homicide	1 0	0			5,0 % i	
110111IGIGG		•	Patrons	0	0	0
			Employees	0	0	0
			Others	0	0	0
Forcible rape	0	0				
			Patrons	0	0	0
			Employees	0	0	0
Dalahan	25		Others	0	0	U
Robbery	25	6	Patrons	5	20	0
			Employees	0	0	
,			Others	o	0	0
Aggravated assault	18	6			Carlot	
7.195/210101 2002211			Patrons	8	4	0
			Employees	0	1	0
			Others	2	5	2
Property Crime	Inc Inv	Arrests			(d. 27) 9.	
Burglary	0	0		0	0	0
Larceny/theft	42	3			d moderation for sea	0.1
	i		Patrons	5	6	21
			Employees	0	0 5	
Motor vehicle theft	26	1	Others	U		3
Motor vericle their	20	'	Patrons	0	0	23
			Employees	0	0	0
	1		Others	0	0	3
Arson	0	0		0	0	0
Part II Offenses (Arrests)	Inc Inv	Arrests				
Other assaults	. 79	44		10	30	4
Vandalism	129	61		23	37	1
Sex offenses	1	1		1	0	Ō
Drug abuse violations	231	235		37	187	1.1
Driving under the influence	4	4		0	0	4
Drunkenness	173	172		47	117	8
Disorderly conduct	649	612	1	99	388	25
Trespassing	403	380		0	27	353
Fare evasion	25,399	23,964	16,5		7,400	1
Curfew & loitering laws	175	156		0	153	3
Total Transit Property Damage				7,602.59		
	Int	erna	ıl Use O	nly		
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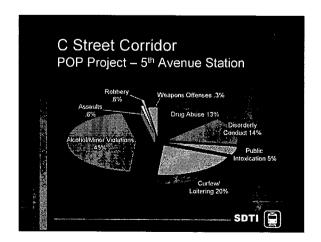
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			Employees	0		0	0
			Others	0		0	1
Forcible rape	0	0					
	l		Patrons	0		0	
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	<del></del>	40	Others	0		- 01	U
Robbery	17	12	Detres	6		11	0
			Patrons Employees	0		<del>                                      </del>	ŏl
			Others	0		1	1
Aggravated assault	11	2	Ciners				
Aggravated assault	''	_	Patrons	0		3	0
	1		Employees	0		1	0
			Others	0		8	2
Property Crime	Inc Inv	Arrests			22		
Burglary	0	0		0		0	0
Larceny/theft	37	5		-	A-1742		10
			Patrons	5		0	19 2
			Employees	0		3	6
	18	0	Others			3	<u> </u>
Motor vehicle theft	10	U	Patrons	0		0	18
			Employees	0		0	0
			Others	0		0	0
Arson	0	0		0		0	0
Part II Offenses (Arrests)	Inc Inv	Arrests					
Other assaults	57	39		15	·=	24	0
Vandalism	101	48		14		28	6
Sex offenses	8	3		1		1	1
Drug abuse violations	291	292	<u> </u>	52		225	15
Driving under the influence	11	1		0		0	1
Drunkenness	120	119		27		87	5 . 22
Disorderly conduct	714	686	<u> </u>	196		468	135
Trespassing	161	145	<del> </del>	0	4	10	135
Fare evasion	24,438	23,192		18,218	4,	974	3
Curfew & loitering laws	107	105		4		98	
				T 6 4			
Total Transit Property Damage				<u> </u>	,314.10		
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Report Run Date			Report Run Ti	me	Reportin		
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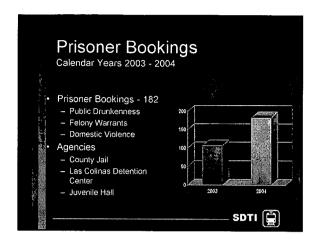
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1 oroible rape		"	Patrons	0	0	0
i			Employees	0	0	0
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Robbery	6	0		4		
·			Patrons	3	3	0
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			Others	0	0	0
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Property Crime	Inc Inv	Arrests	Others	3	U	1
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			Employees	1	0	Ö
			Others	4	0	ol ol
Motor vehicle theft	1 1	0				
	· ·		Patrons	0	0	0
			Employees	0	0	1
			Others	0	0	
Arson	0	0		0	0	0
Part II Offenses (Arrests)	Inc Inv	Arrests				
Other assaults	60	13		5	8	
Vandalism	134	40		27	13	0
Sex offenses	9	0		0	0	
Drug abuse violations	83	91		2	81	
Driving under the influence	0	0		0	0	0
Drunkenness	21	18		6	11	
Disorderly conduct	185	40		18	22	
Trespassing	4	1		0	1	
Fare evasion	37	17		11	6	
Curfew & loitering laws	55	53		0	38	15
			1	<u> </u>	004.04	
Total Transit Property Damage				\$ 3,	991.24	
,	Int	erna	ıl Use O	n	aly	
Report Run Date			Report Run Time		Reporting Pe	
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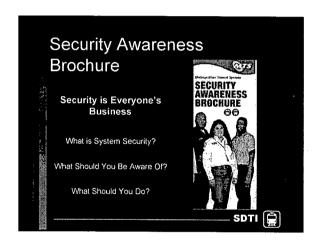
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Part I Offenses (Reports)				ı		
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Homicide	0	0	D		0	0
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Forcible rape	0	0	Culcis		U	J
r orcible rape		"	Patrons	0	0	0
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•			Patrons	0	. 2	0
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			Others	0	1	0
Aggravated assault	2	0			4	
		ļ	Patrons	0	1	0
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B	Inc Inv	Arrests	Others	1	0	U
Property Crime	1 0			0	0	0
Burglary	1 0	0		- 0		
Larceny/theft		0	Patrons	0	0	0
			Employees	0	0	0
			Others	0	0	0
Motor vehicle theft	0	0				
			Patrons	0	0	0
			Employees	0	0	0
			Others	0	_0	0
Arson	0	0		0	0	0
Part II Offenses (Arrests)	Inc Inv	Arrests				
Other assaults	18	9		3	6	0
Vandalism	72	27		17	9	
Sex offenses	11	0		0	0	
Drug abuse violations	72	73	<u> </u>	8	55	
Driving under the influence	0	0		0	0	
Drunkenness	8	8	ļ	1	5	The second secon
Disorderly conduct	40	31	ļ	12	19	
Trespassing	2	2	<u> </u>	0	0	
Fare evasion	10	6	<u> </u>	4	39	
Curfew & loitering laws	41	41		0		
Total Transit Property Damage				\$ 2,4	10.22	
	Int	erna	ıl Use	On	ly	
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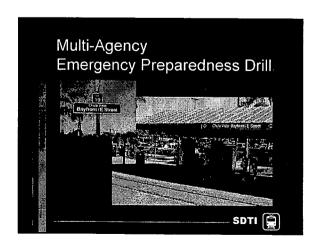


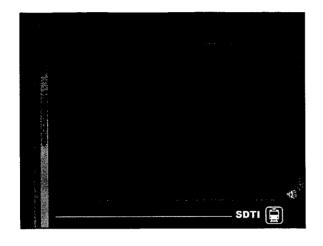




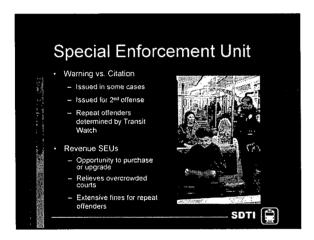


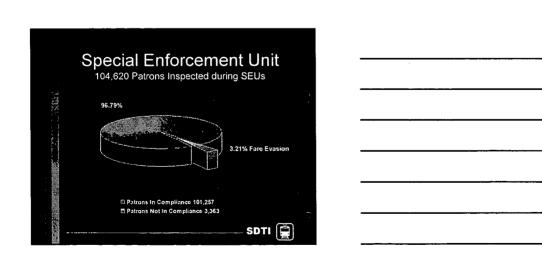


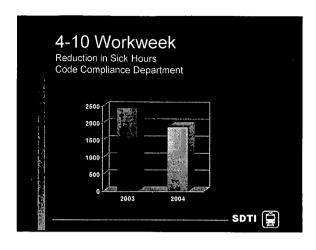


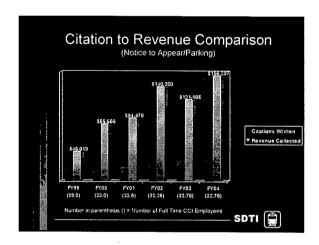


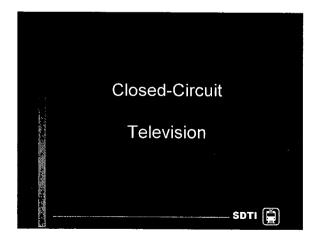
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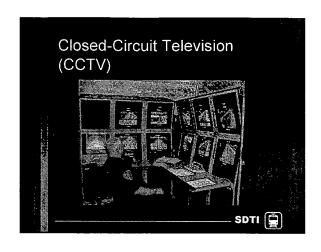


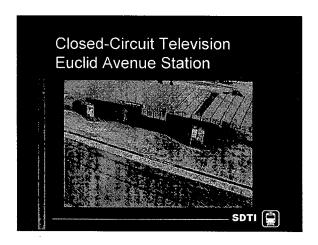


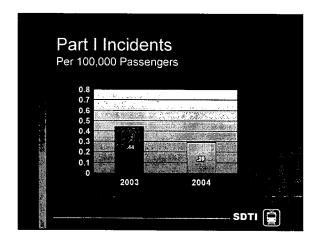












	Part II Arrests		
		2003	2004
	Other Assaults	44	39⊽
	Vandalism	61	48♡
	Sex Offenses	01	03▲
- 1	Drug Abuse Violations	235	292▲
	DUI	04	01♡
1	Drunkenness	172	119♥
thi.	Disorderly Conduct	612	686▲
	Trespassing	380	145♥
	Curfew/Loitering	156	105♡
			SDTI 🖺





1255 Imperial Avenue, Suite 1000: San Diego, CA 92101-7490 619.231.1466, FAX 619.234.3407

# **Agenda**

Item No. 46

CIP 10940

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc.

March 24, 2005

Subject:

MTS: STATUS REPORT ON INTELLIGENT TRANSPORTATION SYSTEMS

#### RECOMMENDATION:

That the Board of Directors receive the report and provide comments.

**Budget Impact** 

None.

#### **DISCUSSION:**

Samuel Johnson, ITS Chief Technology Officer for the San Diego Association of Governments, will be present at the MTS Board of Directors meeting to present the attached report on the status of regional intelligent transportation systems.

Paul C. Jablonski Chief Executive Officer

Key Staff Contact: Samuel Johnson, 619.699.6958, sjo@sandag.org

Attachment: A. Status Report on Regional Intelligent Transportation Systems

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#### KEY TRANSPORTATION MANAGEMENT AREAS

#### 1. Freeway Management

Our objective for freeway management is consistent with the goals identified for Systems and Demand Management in the MOBILITY 2030 Regional Transportation Plan. Utilizing technologies, such as traffic-monitoring cameras, vehicle detection, automatic vehicle location, and changeable message signs to support dynamic management, performance monitoring, and ultimately more efficient management of our transportation resources.

#### Associated Projects

- Advanced Transportation Management System (ATMS) Deploys an integrated management system for Caltrans operations staff to monitor freeway performance through vehicle-detection systems, automatically detect incidents, and provide access to and control over traffic cameras and changeable message signs.
- Automatic Vehicle Classification Provides for the collection and analysis of vehicle detection data to identify vehicle types and enhance planning and management capabilities.
- Freeway Service Patrol/Traffic Management Team Automatic Vehicle Location

  System Implements a real-time management tool for use by Caltrans and CHP staffs to monitor assistance vehicle locations and performance, automate data collection, and improve incident management.

#### 2. Transit Management

Our focus for transit is to produce an efficient regional management system that promotes seamless travel for patrons, enhances safety, and becomes more competitive with the automobile. The objectives for transit management are comprehensive and focus on operational efficiency as well as customer safety and convenience. Regional approaches to technologies such as smart cards, wireless communications for voice and data, computer-aided dispatch, automatic vehicle location, signal priority, and electronic message boards will provide for real-time management of operations, promote customer confidence in system reliability, ease frustration with fare payment, and collectively increase ridership.

#### Associated Projects

- Regional Automatic Vehicle Location Provides for the demonstration/pilot and early deployment of key transit technologies, such as automatic vehicle location, electronic message boards for predictive arrival of buses, and signal priority along Harbor Drive.
- Regional Scheduling System Deploys a single automated fixed-route scheduling system for use by the region's transit operators. The system will allow for better coordination of services across the region regardless of the operator and provide a single data source for use by the region's telephone information system, on-line transit trip planner, the Regional Transit Management

System, and SANDAG's passenger counting program.

- Regional Transit Management System Implementation of a single system, which will provide wireless voice and data communications, computer-aided dispatch, automatic vehicle location based on the global positioning system, and real-time customer information for use by region's operators.
- Automated Fare Collection System Installs the foundation for the region's electronic payment system through deployment of new bus fareboxes and station ticket vending machines with smart card capabilities. This system will achieve a major milestone in promoting seamless travel for patrons by reducing the complexities of fare payment and improving operations by reducing cash and eliminating multiple fare media throughout the region.
- Central Train Control System Implementation of a comprehensive backend system for: train tracking, system monitoring, and control; integration of San Diego State University (SDSU) tunnel systems; and initial deployment of field devices to address San Diego Trolley, Inc.'s (SDTI's) critical operational needs and improve operations' management capabilities.

#### 3. Arterial Management

Our objective for arterial technology deployment is to create a synchronized traffic signal system, which provides for increased efficiency/capacity and improved coordination for event/incident management.

#### Associated Projects

Regional Arterial Management System – Deploys a common traffic signal management system enabling local jurisdictions, transit operators, and Caltrans to work together. The system will allow for better management of traffic through coordination of traffic signal timing across jurisdictional boundaries, between arterials and freeways, and in support of transit services to optimize traffic flow and create an improved system for all travelers.

#### 4. Event/Incident Management

Our objective for incident management is to provide transportation and public safety agencies with information regarding the impacts of planned and unplanned events that affect our transportation system. This would provide for proactive real-time management by transit and public safety operations, resulting in fewer increases in travel time for travelers and faster on-scene arrival by emergency personnel.

#### Associated Projects

Integrated Advanced Transportation Management System – Through the user interface for the regional transportation management system, transportation and public safety agencies would be able to create and receive information regarding incidents affecting the transportation network and their traffic impacts.

#### 5. Traveler Information

The objective for our traveler information system effort is to implement an automated service that utilizes advanced technologies and effective information dissemination to serve the broad range of traveler information needs of the region, providing travelers with reliable and timely information to manage individual trips for optimum safety, efficiency, and economy.

#### Associated Projects

Automated Traveler Information System/511 – Develops and implements a comprehensive set of technologies and services utilizing data from the regional transportation system for the deployment of traveler information services. The system would provide travelers with real-time information on freeway speeds, freeway and transit travel times, the ability to create driving and transit trip plans, and receive incident information regarding impacts to these services through internet, phone, and wireless mediums.

#### SYSTEMS INTEGRATION AND COORDINATED OPERATIONS

Key to our vision for a regional transportation system is the integration of various modal technology deployments into a comprehensive management system that provides a unified view of the region's surface transportation system and resources. Our vision seeks to have transportation and public safety agencies utilize the system and promote coordinated operations through shared and/or virtual facilities.

Projects under development that will benefit all transportation areas:

- Intermodal Transportation Management System Develops the umbrella and core of our regional transportation management system through the development of several key systems and integration of these elements and the various modal systems for transit, freeway, and arterial management into the integrated regional system. This development and integration provide for implementation of the Automated Traveler Information Management Server, which will collect and forward the real-time data necessary for the traveler information system. (Development/Implementation)
- <u>Fiber-Optic Communication System</u> To support the data connectivity needs of the regional systems and the operators/agencies using them, Caltrans and SANDAG are each working to install and/or enhance their communication networks. These efforts will result in the creation of a logical regional network connecting transit, freeway, and arterial systems for integration, traveler information, and coordinated operations. (Design/Development)
- Regional Operations Center As a means to maximize use of the resulting transportation management system and promote coordinated operations, SANDAG is working with the transit operators and the City of San Diego to construct a regional transportation management center. The facility would house the central/integrated components of our ITS deployments, transit dispatch/control operations, City of San Diego special events traffic management operations, and provide virtual coordinated operations through communications and data sharing with the Caltrans Traffic Management Center and other traffic management and emergency operation facilities in the region. SANDAG is currently seeking participation from public safety agencies to

identify direct and regional benefits from their use or virtual connection to the facility. (Preliminary Design)

#### CHALLENGES AND FUTURE STEPS

The region is making considerable progress in planning and deployment of intelligent transportation systems. Projects/efforts that will result in significant benefits for the region are underway, and their completions will provide transportation operators, public safety, and travelers with vital tools to improve mobility in the region. However, SANDAG, local cities, transit operators, the County, and Caltrans face major hurdles in resource limitations for project funding and program/systems management, increased expectations for system usage, commitments to ownership and operation of the systems, and agency agreements for shared use of communications and field devices. These financial and operational issues are currently being worked on and must be resolved on existing projects and before any new projects are started. As these hurdles are surpassed, SANDAG will facilitate the following efforts:

- Completion of major phases of in-progress ITS deployments and identification of funding for expansion phases;
- Reestablishment of regional ITS executive, operations management, technology managers' committees, and increased participation of stakeholders;
- Expansion of field devices for traffic monitoring, vehicle detection stations/systems, and changeable message signs;
- Incorporation of parking management and border technologies into key initiatives;
- Initiation of planning for expansion of the transit smart card to a regional electronic payment/access medium for all regional transportation services; and
- Update the Regional Strategic Plan and ITS architecture to reflect standards/systems changes,
   Federal Highway Administration (FHWA) requirements for incorporation of an architecture maintenance plan, and strategy for continued and new deployments.

#### SUMMARY

SANDAG's involvement in the regional application of intelligent transportation systems dates back to the early 1990s when initial planning efforts were formalized. Under its leadership, the region developed a strategic plan, adopted a regional ITS architecture that provides the framework for our technology deployments, and initiated project implementations through participation in the FHWA Priority Corridor Showcase Projects. These early efforts formed the region's vision for our intelligent transportation systems, and established SANDAG's role/mission in bringing this vision to fruition.

SANDAG has worked diligently with transportation stakeholders to fulfill its mission and manage the deployment and integration of technology solutions that improve operations and provide efficiency improvements to our transportation system. We have focused our vision and efforts on key objectives in the freeway, arterial, transit, and event\incident management areas with the ultimate goal of deploying a state-of-the-art traveler information system using the integrated data from each modal area.

The completed system will provide travelers with the information they need to change behaviors and plan their trips to make use of our transportation system more efficient.

While financial hurdles do exist in making our vision of a regional transportation management system a reality, the continued commitment to this effort will result in a more efficient system that not only supports transportation operations but also aids public safety and delivers tangible products to the public. SANDAG has already taken the first steps to achieving our vision through the consolidation effort by establishing the ITS program under project implementation so projects can be delivered faster.

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# Intelligent Transportation Systems Program and Project Overview Metropolitan Transit System Board of Directors March 24, 2005

### **Presentation Topics**

- · Vision and Mission
- · Focus Areas, Objectives & Transit Projects
- Systems Integration & Coordinated Operations
- · Challenges & Future Efforts
- · Summary

SANDAG

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## ITS Program Vision

Develop a comprehensive regional transportation management system utilizing advanced technologies to

- Improve system management and services:
- Develop traveler information services to promotemore efficient system usage; and
- Support public safety.

SANDAG.

# ITS Program Mission

- Develop regional strategic plans and technology framework:
- Facilitate the design and implementation of individual agency/modal systems;
- Build consensus and operational partnerships between transportation and/or public safety organizations; and
- Design, implement, and manage the integration of agency/modal systems into the regional system.

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# ITS Program Focus Areas

- 1. Freeway Management
- 2. Transit Management
- 3. Major Streets/Arterial Management
- 4. Incident Management
- 5. Traveler Information

SANDAG

# 1. Freeway Management Improve Transportation System

- Monitoring
- More Efficient Management

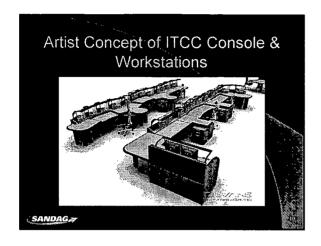


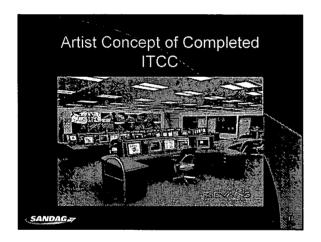
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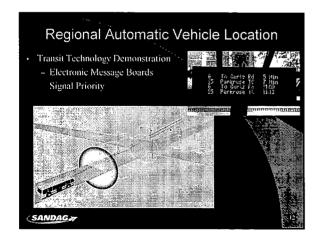


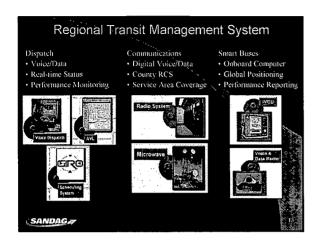


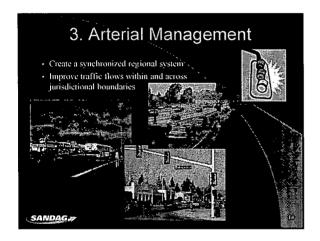
# Centralized Train Control (CTC) • Modern Control Center Operations - Train Tracking - Switch Control - Power Sub-Station Health Monitoring - Fire/Life & Safety for Tunnel Operations - Control of Passenger Information Signs • Improved Operations • Improved Safety

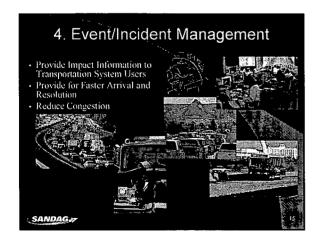


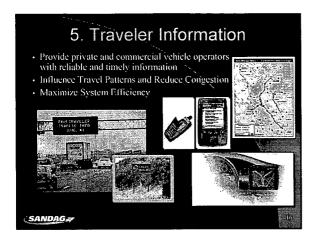




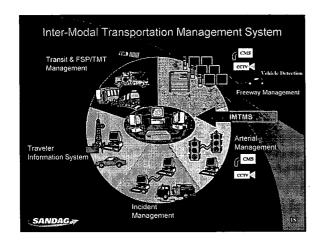


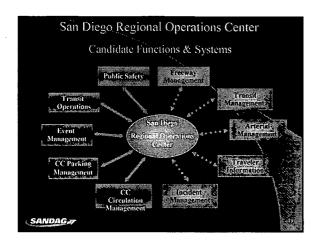






# Systems Integration & Coordinated Operations Comprehensive management of our transportation system Utilization by transportation and public safety agencies Promote coordinated operations Provide travelers with system information





# Challenges Project and Program Funding Increased Expectations for System Usage Commitments to Ownership and Operation Agency Agreements for Shared Use of Communications and Field Devices

# Future Steps Completion of current deployments, evaluation, and determination for expansion phases; Establishment of regional working groups; Exploring Collaborative Opportunities with Public Safety, Homeland Security, other Regional Partners; and Update Regional Strategic Plan and ITS Architecture.

# Summary • Strong Regional Vision and Mission • Major ITS Projects in Implementation or Planning • Challenges to Overcome • Initiating evaluation and planning for next program phase.

SANDAG

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# **Agenda**

Item No. 47

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. OPS 960.5 (PC 30101)

March 24, 2005

Subject:

SDTC: PENSION UPDATE

RECOMMENDATION:

That the Board of Directors receive this report.

**Budget Impact** 

None.

### **DISCUSSION:**

Attached for your review is a copy of the Investment Performance Analysis of the SDTC Employees' Retirement Plan through December 31, 2004 (Attachment A). The plan had a total market value of \$152,690,186 on December 31, 2004—an increase of \$84.6 million from January 1, 2004. The issuance of pension obligation bonds (POBs) in October 2004 accounted for \$74.6 million of the increase, while \$10 million was through the investment increase in the SDTC plan.

As of December 31, 2004, equity investments comprised 62.6 percent of the portfolio, above the 60 percent equity target, and fixed-income and cash investments comprised 37.3 percent (below its target of 40 percent). Both equity and fixed-income allocations are in line with the investment policy guideline of +/-5 percent of the target range.

For the quarter ending December 31, 2004, the total SDTC plan provided a return of 7.8 percent, outperforming the customized index return of 7.4 percent. This return



ranked at the 31st percentile in the total public funds universe for the quarter. Over the one-year period, the SDTC plan returned 10.1 percent, slightly underperforming the customized index return of 10.4 percent, and the return ranked in the 43rd percentile in the total public funds universe. For the long-term performance, the SDTC plan still ranked in the top quartile of the total public fund universe.

As of the end of the last year, the SDTC plan had nine investment managers in the following asset classes: two U.S. large cap equity managers, two U.S. small-midsize cap equity managers, two global equity managers, two U.S. fixed-income managers, and one global fixed-income manager. With the additional assets generated from the POB, the SDTC plan hired a new real estate manager during the first quarter of 2005 with a 5 percent allocation of the overall SDTC plan assets. The plan's assets were also rebalanced to reflect the asset allocation.

Bruno Grimaldi, the plan's investment advisor, will present the report in more detail and be available to answer questions at the March 24 MTS Board Meeting.

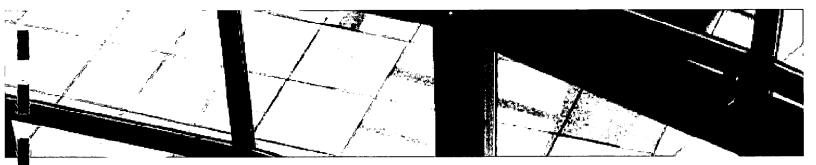
Paul C. Jablonski Chief Executive Officer

Kev Staff Contact: Cliff Telfer, 619.557.4532, cliff.telfer@sdmts.com

DDeVaul/JGarde MAR24-05.47.CTELFER 3/15/05

Attachment: A. Investment Performance Analysis through 12/31/04

Att. A, Al 47, 3/24/05, OPS 960.5 KPMG INVESTMENT ADVISORS San Diego Transit Corporation Investment Performance Analysis **December 31, 2004** AUDIT TAX - ADVISORY



This presentation was prepared by

Bruno G. Grimaldi, *Manager* Nicolina R. Ruvolo, *Senior Associate* Andrew W. Lui, *Senior Associate* 

KPMG Investment Advisors 345 Park Avenue, New York NY 10154 (212) 872-6571



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- 2. Capital Markets Overview
- 3. Total Retirement Fund
- 4. Westwood Large Cap Portfolio
- 5. TCW Investment Management
- 6. Vanguard Explorer Fund
- 7. Kayne Anderson
- 8. Brandes Investment Partners
- 9. Nicholas Applegate
- 10. Banc One Investment Advisors
- 11. PIMCO Total Return Fund II
- 12. Loomis Sayles-Global Bond Fund



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The Employees' Retirement Plan for San Diego Transit had a total market value of \$152,690,186 on December 31, 2004, an increase of \$83.5 million from September 30, 2004. Ninety percent of the increase was due to the issuance of the POBs while ten percent was through an investment increase.

As of December 31, 2004, equity investments comprised 62.63% of the portfolio, above the 60% equity target, and fixed income and cash investments comprised 37.37%, below its target of 40%.

For the quarter ending December 31, 2004, the total San Diego Transit Portfolio provided a return of 7.81%, outperforming the customized index return of 7.46%. This return ranked at the 31<sup>st</sup> percentile in the Public Funds Total Fund universe for the quarter. For the long term performance, the Plan still ranked in the top quartile.

Westwood's Large Cap portfolio returned 7.85% for the fourth quarter of 2004, underperforming the S&P 500 Stock Index return of 9.23%. This portfolio ranked at the 86th percentile in the large cap value equity universe. The portfolio invests in about 40 high quality companies that appear undervalued relative to their forecasted growth rate based on proprietary research. The portfolio remains fully invested (95-100%) at all times.

TCW's Large Cap portfolio returned 11.22% for the fourth quarter of 2004, outperforming the S&P 500 Stock Index return of 9.23%. The portfolio ranked at the 18<sup>th</sup> percentile in the large cap growth universe. TCW Investment Management has a concentrated core equity strategy that seeks to maximize capital appreciation by participating in the long term success of selected businesses purchased at attractive valuations.

Vanguard Explorer Fund (Admiral share) was purchased in October 2004. The Fund returned 14.29% for the fourth quarter, underperforming the Russell 2000 Growth Index return of 15.07%. The portfolio ranked at the 41<sup>st</sup> percentile in the small cap growth equity universe. This fund seeks long-term capital appreciation using a multimanager approach that provides exposure to a broad universe of small company growth stocks.

Kayne Anderson's Mid-Cap portfolio returned 13.05% for the fourth quarter of 2004 and underperformed the Russell 2500 Index return of 14.23%. The portfolio ranked at the 42<sup>nd</sup> percentile in the mid-cap value equity universe. Kayne Anderson has an approach that focuses on structuring a well diversified portfolio comprised of candidates the firm expects to become a new generation of high quality, "blue chip" companies.

Brandes' Global Large Cap portfolio returned 14.53% for the fourth quarter of 2004, outperforming the MSCI World Index return of 12.05%. The portfolio ranked at the 14<sup>th</sup> percentile for the quarter in the global equity mutual fund universe. This portfolio is designed for investors who seek long-term capital appreciation along with diversification and value equity management.

Nicholas Applegate's Global Large Cap portfolio returned 11.78% for the fourth quarter of 2004, underperforming the MSCI World Index return of 12.05%. The portfolio ranked at the 65th percentile in the global equity mutual fund universe. Nicholas Applegate has an investment strategy that reflects a focus on individual security selection. The process seeks to identify growth stock opportunities through extensive research, seeking companies poised for a change.

Banc One had a return at 0.96% for the fourth quarter, slightly outperforming the Lehman Brothers Aggregate Bond Index return of 0.95%. The portfolio ranked at the 42<sup>nd</sup> percentile in the intermediate-term fixed income mutual fund universe. This fund invests mainly in investment grade bonds and debt securities. These include U.S. government obligations and mortgage-backed securities.

The PIMCO Total Return II Fund returned 0.47% for the quarter, underperforming the Lehman Brothers Aggregate Bond Index return of 0.95%. The Fund ranked at the 82<sup>nd</sup> percentile in the intermediate term fixed income fund for the current quarter. The Fund uses the core bond portfolio strategy which seeks maximum current income and price appreciation consistent with the preservation of capital and prudent risk taking. All sectors of the bond markets are utilized to add value while maintaining an overall risk level similar to the benchmark.

The Loomis Sayles Global Bond Fund returned 6.75% for the fourth quarter, underperforming the Citigroup (Salomon Brothers) World Government Bond Index return of 8.50%. This fund ranked at the 62<sup>nd</sup> percentile in the global fixed income universe for the quarter. The objective of this fund is to seek a high total investment return through a combination of high current income and capital appreciation.



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### **GDP Increased During the Fourth Quarter**

- The economy grew at a 3.1% seasonally adjusted annualized rate in the fourth quarter.
- The Index of Leading Economic Indicators decreased 0.3% in October, increased 0.2% in November, and increased 0.2% in December.

# **Prices Increased During the Quarter**

- The seasonally adjusted Consumer Price Index All Urban Consumers (CPI-U) increased by 0.74% during the quarter.
- The seasonally adjusted Producer Price Index (PPI) for finished goods increased by 1.55%¹ during the quarter.

1. Preliminary. All indexes are subject to revision four months after original publication.



# U.S. Economy as of December 31, 2004

■ The Federal Reserve Board raised short-term interest twice during the fourth quarter in 2004.

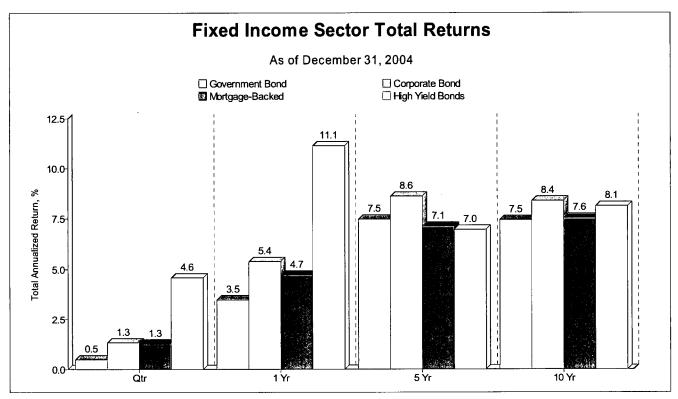
Federal Funds Interest Rate History (2001-2004)

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Announce	Fed Funds	Direction	Amount of	Discount	Primary	Secondary	Economic
Date	Target	i Las Maria e constitui	Change	Rate *	Rate *	Rate *	Assessment
12/14/2004	2.25%	Tightening	+0.25%		3.25%	3.75%	Balanced
11/10/2004	2.00%	Tightening	+0.25%		3.00%	3.50%	Balanced
09/21/2004	1.75%	Tightening	+0.25%		2.75%	3.25%	Balanced
08/10/2004	1.50%	Tightening	+0.25%		2.50%	3.00%	Balanced
06/30/2004	1.25%	Tightening	+0.25%		2.25%	2.75%	Balanced
05/04/2004	1.00%	None	None		2.00%	2.50%	Balanced
03/16/2004	1.00%	None	None		2.00%	2.50%	Balanced
01/28/2004	1.00%	None	None		2.00%	2.50%	Balanced
12/09/2003	1.00%	None	None		2.00%	2.50%	Balanced
10/28/2003	1.00%	None	None		2.00%	2.50%	Bal. w/ risk of disinflation
09/16/2003	1.00%	None	None		2.00%	2.50%	Bal. w/ risk of disinflation
08/12/2003	1.00%	None	None		2.00%	2.50%	Bal. w/ risk of disinflation
06/25/2003	1.00%	Easing	-0.25%		2.00%	2.50%	Bal. w/ risk of deflation
05/06/2003	1.25%	None	None		2.25%	2.75%	Bal. w/ risk of deflation
03/18/2003	1.25%	None	None		2.25%	2.75%	None
01/29/2003	1.25%	None	None		2.25%	2.75%	Balanced
12/10/2002	1.25%	None	None	0.75%			Balanced
11/06/2002	1.25%	Easing	-0.50%	0.75%			Balanced
09/24/2002	1.75%	None	None	1.25%			Weakness
08/13/2002	1.75%	None	None	1.25%			Weakness
06/26/2002	1.75%	None	None	1.25%			Balanced
05/07/2002	1.75%	None	None	1.25%			Balanced
03/19/2002	1.75%	None	None	1.25%			Balanced
01/30/2002	1.75%	None	None	1.25%			Weakness
12/11/2001	1.75%	Easing	-0.25%	1.25%			Weakness
11/06/2001	2.00%	Easing	-0.50%	1.50%			Weakness
10/02/2001	2.50%	Easing	-0.50%	2.00%			Weakness
09/17/2001	3.00%	Easing	-0.50%	2.50%			Inter-meeting

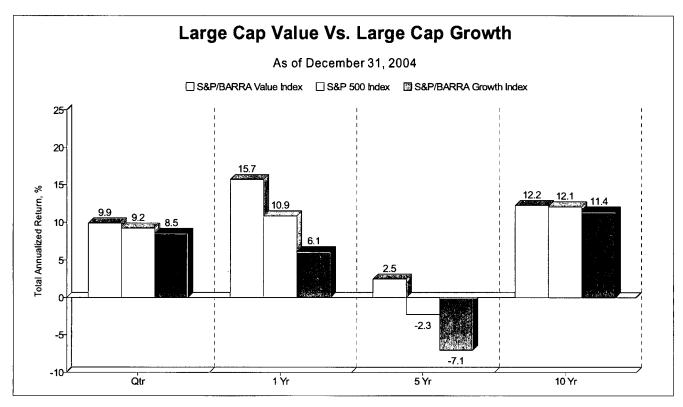
<sup>\*</sup> Beginning January 9, 2003 the primary and secondary credit rate will be tracked.



# Fixed Income Markets as of December 31, 2004,



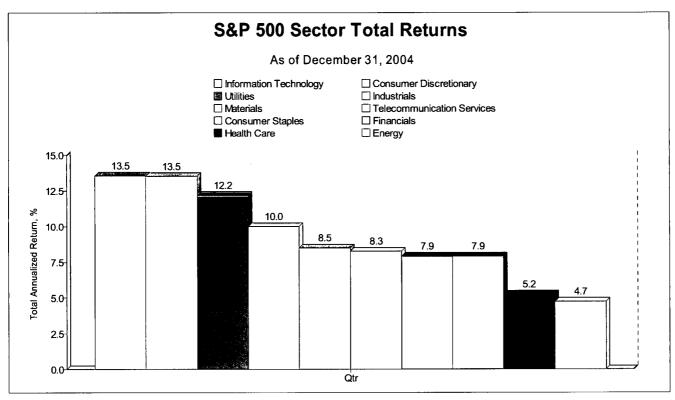
- High yield bonds was the best performing bond sector during the fourth quarter of 2004.
- High yield bonds significantly outperformed all other bond sectors over the one year period.
- Over longer periods, corporate bonds was the best performing bond sector.



- Large cap value stocks outperformed large cap growth stocks by 140 basis points during the fourth quarter of 2004.
- Over the last one and five year periods, large cap value stocks significantly outperformed large cap growth stocks.
- Over the ten year period, large cap value stocks outperformed large cap growth stocks by 80 basis points.



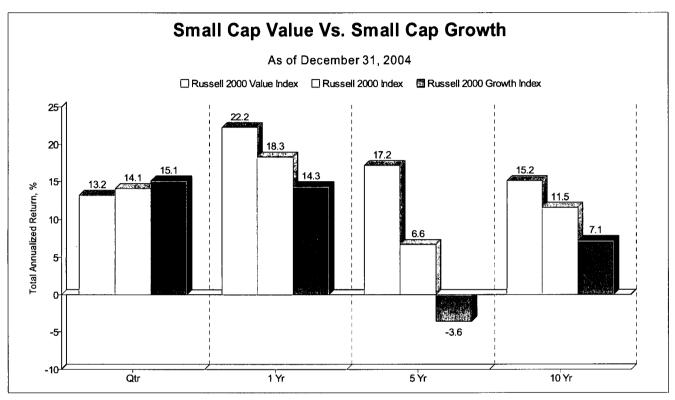
# U.S. Equity as of December 31, 2004



- Information technology and consumer discretionary were the best performing sectors during the fourth quarter of 2004.
- Energy and health care were the worst performing sectors during the fourth quarter.

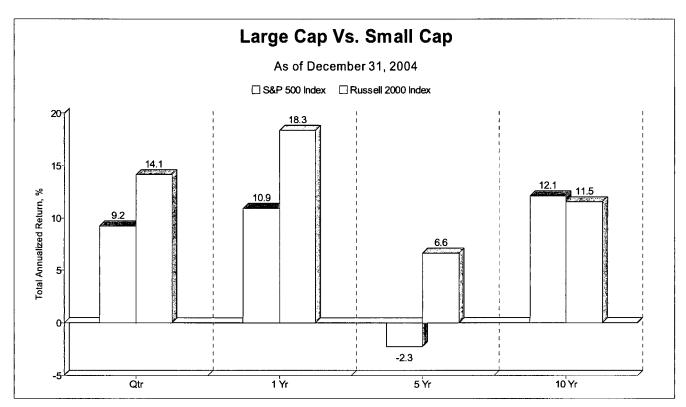
S&P 500 Sector	4Q 2004	1 Yr	2 Yrs	3 Yrs	4 Yrs	5 Yrs	6 Yrs	7 Yrs	8 Yrs	9 Yrs	10 Yrs
Information Technology	13.54	2.56	22.88	-1.87	-8.51	-16.17	-4.89	4.03	6.81	10.41	13.02
Consumer Discretionary	13.50	13.24	24.74	5.83	5.06	-0.51	3.37	8.07	11.06	11.20	12.08
Utilities	12.18	24.28	25.27	3.18	-6.50	3.73	1.46	3.27	5.73	5.72	8.16
Industrials	9.99	18.03	24.91	4.75	2.02	2.78	5.69	6.41	8.80	10.50	13.07
Materials	8.52	13.19	25.07	13.93	11.22	5.22	8.32	6.12	6.40	7.41	8.61
Telecommunication Services	8.29	19.85	13.29	-5.43	<i>-</i> 7.19	-14.61	-9.73	-2.72	1.92	1.83	5.29
Consumer Staples	7.92	8.16	9.85	4.93	1.98	4.78	1.17	3.14	6.46	8.46	11.24
Financials	7.91	10.89	20.54	7.44	3.09	7.26	6.73	7.39	11.79	14.18	17.65
Health Care	5.21	1.68	8.16	-1.71	-4.37	2.76	0.39	5.69	9.83	11.02	15.01
Energy	4.73	31.54	28.55	13.67	7.10	8.77	10.37	8.92	10.84	12.42	14.15





- Small cap growth stocks outperformed small cap value stocks by 190 basis points during the fourth quarter of 2004.
- Over longer periods, small cap value stocks significantly outperformed small cap growth stocks.

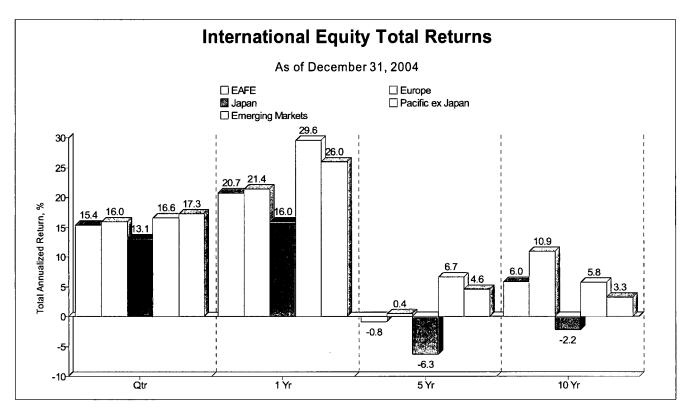
# Large Cap vs. Small Cap as of December 31, 2004.



- Small cap stocks significantly outperformed large cap stocks by 490 basis points during the fourth quarter of 2004.
- Over the one and five year periods, small cap stocks outperformed large cap stocks by large margins.
- Over the ten year period, large cap stocks outperformed small cap stocks by 60 basis points.



# International Equity as of December 31, 2004,

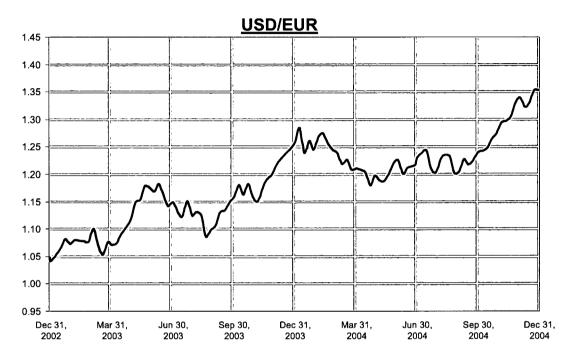


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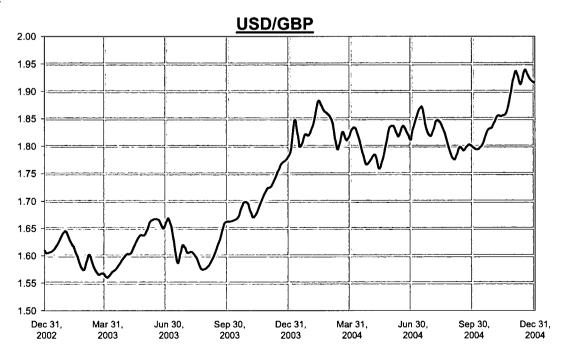
- Emerging markets was the best performer during the fourth quarter of 2004.
- Pacific ex Japan significantly outperformed all other international markets over the one and five year periods.
- Over the ten year period, Europe outperformed all other international markets by at least 490 basis points.

# International Equity Exchange Rate Analysis,

■ The U.S. Dollar weakened against the Euro during the fourth quarter in 2004.

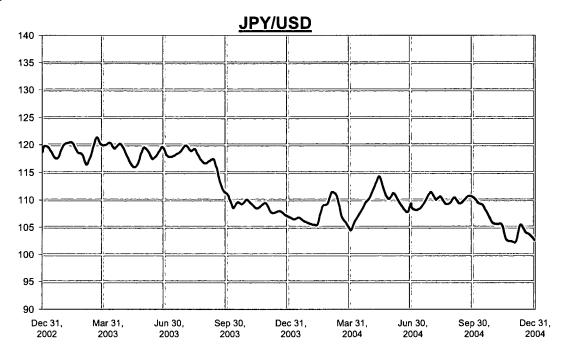


■ The U.S. Dollar weakened against the U.K. Pound during the fourth quarter in 2004.



# International Equity Rate Analysis

■ The U.S. Dollar weakened against the Japanese Yen during the fourth quarter in 2004.

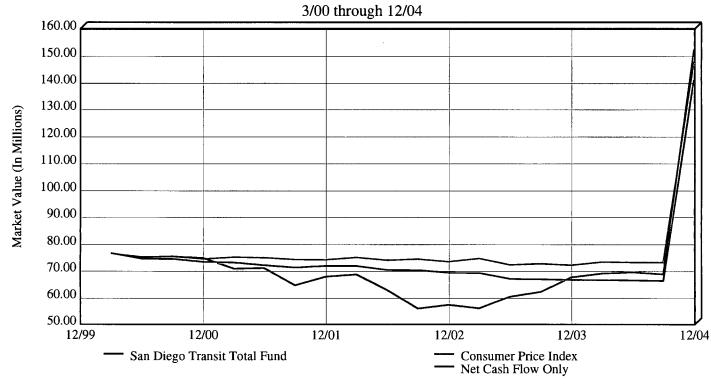




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# San Diego Transit Employees Retirement Plan Sources of Portfolio Growth San Diego Transit Total Fund

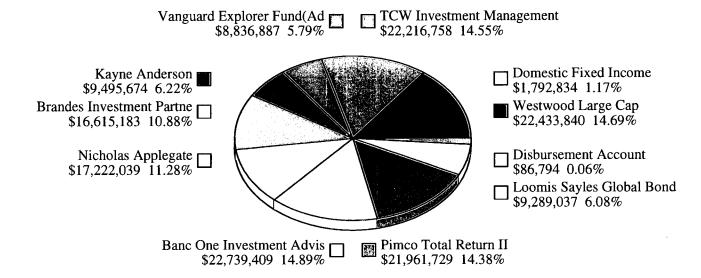


Period Ending	Beginning Value \$(000)	Net Cash Flow	Investment Increment	Ending Value \$(000)	Return	Unit Value
3/00				76,852		100.00
6/00	76,852	-2,079	754	75,527	1.02	101.02
9/00	75,527	-82	318	75,762	0.43	101.45
12/00	75,762	-1,095	527	75,194	0.77	102.23
3/01	75,194	-243	-3,659	71,292	-4.88	97.24
6/01	71,292	-980	1,148	71,460	1.59	98.78
9/01	71,460	-824	-5,508	65,128	-7.79	91.09
12/01	65,128	601	2,614	68,343	7.16	97.62
3/02	68,343	-18	856	69,182	1.95	99.52
6/02	69,182	-1,485	-4,318	63,379	-6.30	93.25
9/02	63,379	-63	-6,894	56,422	-10.89	83.10
12/02	56,422	-932	2,314	57,805	4.94	87.21
3/03	57,805	-137	-1,152	56,515	-1.98	85.48
6/03	56,515	-2,139	6,508	60,884	11.37	95.20
9/03	60,884	-195	1,971	62,660	3.24	98.29
12/03	62,660	-190	5,602	68,072	8.95	107.08
3/04	68,072	-98	1,506	69,480	2.21	109.45
6/04	69,480	-136	590	69,933	0.85	110.38
9/04	69,933	-134	-623	69,177	-0.89	109.40
12/04	69,177	74,699	8,815	152,690	7.81	117.94
Total	76,852	64,470	11,369	152,690	17.94	117.94

# San Diego Transit Employees Retirement Plan Total Fund Allocation By Manager San Diego Transit Total Fund

December 31, 2004

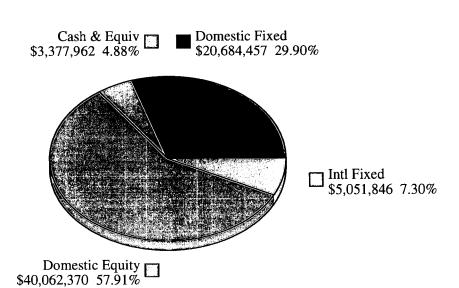
\$152,690,186



# San Diego Transit Employees Retirement Plan Asset Allocation San Diego Transit Total Fund

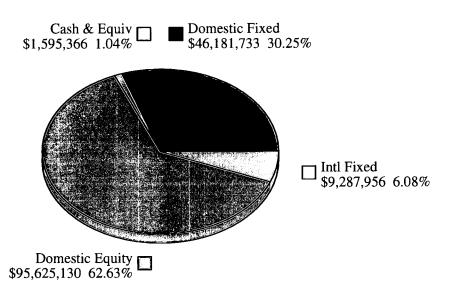
September 30, 2004

\$69,176,635

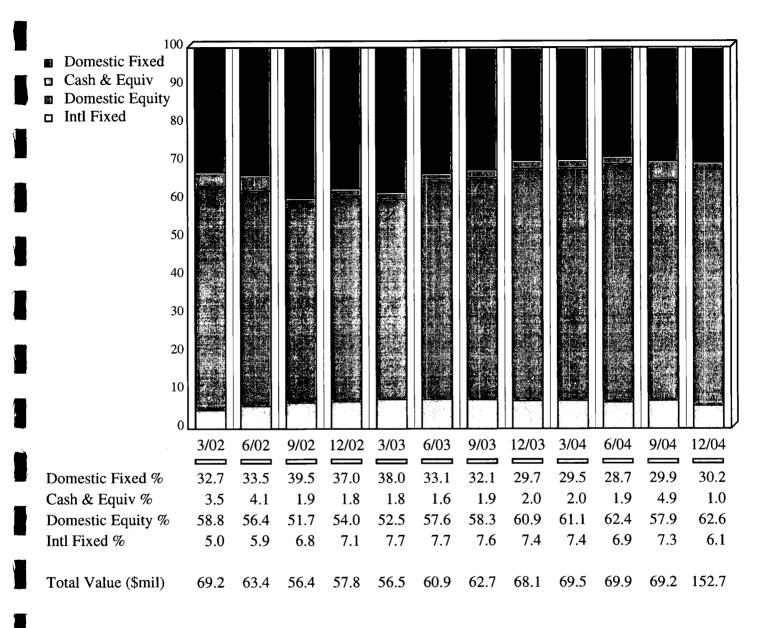


December 31, 2004

\$152,690,186



# San Diego Transit Employees Retirement Plan Asset Allocation San Diego Transit Total Fund



# San Diego Transit Employees Retirement Plan Asset Allocation Summary San Diego Transit Total Fund Quarter Ending 12/31/04

			Fixed In	c. &	Cash	&	Int	l	
Manager Name	Equit	y	Mortg	age	Equival	lents	Fixed In	come	Total
	\$000	%	\$000	%	\$000	%	\$000	%	\$000
Loomis Sayles Global Bond Fund		0.0		0.0	1	0.0	9,288	100.0	9,289
Intn'l Fixed	0	0.0	0	0.0	1	0.0	9,288	100.0	9,289
Westwood Large Cap	22,372	99.7		0.0	62	0.3		0.0	22,434
TCW Investment Management	22,034	99.2		0.0	183	0.8		0.0	22,217
Vanguard Explorer Fund(Admiral)	8,834	100.0		0.0	3	0.0		0.0	8,837
Kayne Anderson	9,126	96.1		0.0	369	3.9		0.0	9,496
Managed Equity	62,366	99.0	0	0.0	617	1.0	0	0.0	62,983
Banc One Investment Advisors		0.0	22,737	100.0	2	0.0		0.0	22,739
Pimco Total Return II		0.0	21,962	100.0	0	0.0		0.0	21,962
Domestic Fixed Income		0.0	1,483	82.7	310	17.3		0.0	1,793
Managed Fixed	0	0.0	46,182	99.3	312	0.7	0	0.0	46,494
Brandes Investment Partners	16,043	96.6		0.0	572	3.4		0.0	16,615
Nicholas Applegate	17,216	100.0		0.0	6	0.0		0.0	17,222
Intn'l Equity	33,259	98.3	0	0.0	578	1.7	0	0.0	33,837
Disbursement Account		0.0		0.0	87	100.0		0.0	87
Managed Short Term	0	0.0	0	0.0	87	100.0	0	0.0	87
Total Fund	95,625	62.6	46,182	30.2	1,595	1.0	9,288	6.1	152,690

# San Diego Transit Employees Retirement Plan Performance Summary Table San Diego Transit Total Fund Periods Endings 12/31/04

							Since	Incept	Incept
Manager	1 Qtr	2 Qtrs	3 Qtrs	1 Year	3 Yrs	5 Yrs	9/30/04	Date	Ret
Westwood Large Cap									
Total Return	7.85	9.58	12.60	14.10	5.92	4.59	7.85	6/30/86	12.52
Standard & Poors 500	9.23	7.19	9.02	10.87	3.58	-2.31	9.23	6/30/86	11.52
TCW Investment Management									
Total Return	11.22	5.08	12.72	12.37	6.46		11.22	12/31/01	6.46
Standard & Poors 500	9.23	7.19	9.02	10.87	3.58		9.23	12/31/01	3.58
Vanguard Explorer Fund(Admiral)									
Total Return	14.29	,					14.29	9/30/04	14.29
Russell 2000 Growth	15.07						15.07	9/30/04	15.07
Kayne Anderson									
Total Return	13.05	7.80	10.40	13.19	7.35		13.05	12/31/01	7.35
Russell 2500	14.23	11.35	11.72	18.30	12.27		14.23	12/31/01	12.27
<b>Brandes Investment Partners</b>									
Total Return	14.53	10.10	11.83	17.11	10.53		14.53	12/31/01	10.53
MSCI World (Gross)	12.05	11.04	12.19	15.25	7.44		12.05	12/31/01	7.44
Nicholas Applegate									
Total Return	11.78	7.55	7.88	11.15	3.12		11.78	12/31/01	3.12
MSCI World (Gross)	12.05	11.04	12.19	15.25	7.44		12.05	12/31/01	7.44
<b>Banc One Investment Advisors</b>									
Total Return	0.96	4.05	1.72	4.51			0.96	6/30/03	3.75
LB Aggregate	0.95	4.18	1.64	4.34			0.95	6/30/03	2.99
Pimco Total Return II									
Total Return	0.47	3.65	1.69	4.28			0.47	6/30/03	2.98
LB Aggregate	0.95	4.18	1.64	4.34			0.95	6/30/03	2.99
Loomis Sayles Global Bond Fund						:			
Total Return	6.75	11.24	7.61	9.89	17.06	12.68	6.75	6/30/98	10.33
S B World Govt Bond	8.50	12.06	8.34	10.36	14.87	8.80	8.50	6/30/98	7.88
San Diego Transit Total Fund									
Total Return	7.81	6.85	7.76	10.14	6.51	4.13	7.81	9/30/82	11.55
Policy Index	7.46	7.83	7.53	10.41	7.36	3.19	7.46	9/30/82	11.80

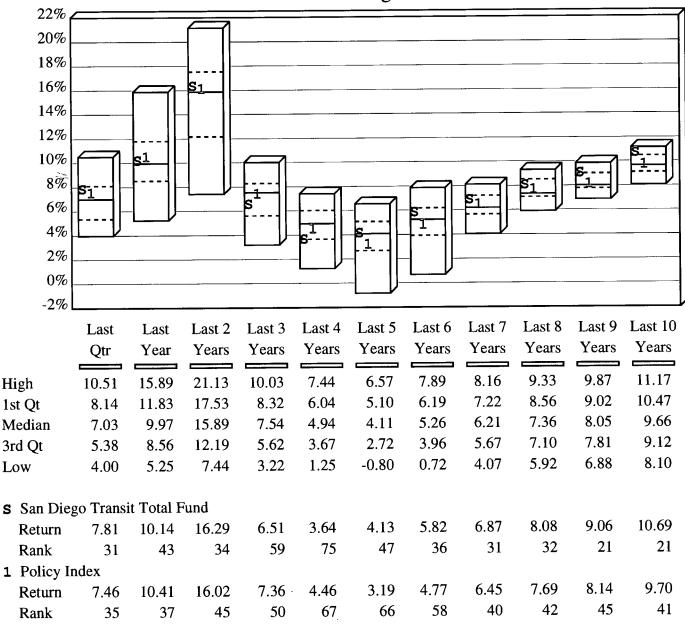
# San Diego Transit Employees Retirement Plan Performance Overview San Diego Transit Total Fund Returns for Periods Ending December 31, 2004

	Last	Last 2	Last 3	Last	Last 3	Last 5	Since
	Quarter	Quarters	Quarters	Year	Years	Years	4th Qtr 82
Total Return	7.81	6.85	7.76	10.14	6.51	4.13	11.55
Total Fund Portfolios Median Return	7.15	7.09	7.34	10.41	6.62	4.14	
Allocation Index Return	7.25	7.18	7.08	9.90	7.27	2.91	11.57
Policy Index Return	7.46	7.83	7.53	10.41	7.36	3.19	11.80
Domestic Equity Return	11.75	8.01	11.00	13.26	6.94	2.47	12.85
Equity Segment Median Return	10.48	8.31	9.77	12.98	5.91	1.86	
Standard & Poors 500	9.23	7.19	9.02	10.87	3.58	-2.31	13.98
Russell 2000	14.09	10.84	11.35	18.32	11.48	6.61	12.40
Domestic Fixed Return	0.79	3.93	1.77	4.57	3.04	5.74	
Fixed Income Segment Median Return	0.90	3.87	1.61	4.10	6.13	7.80	
LB Aggregate	0.95	4.18	1.64	4.34	6.20	7.71	9.39
Int'l Fixed Return	6.78	11.28	7.65	9.92	17.07	12.69	
Citigroup World Govt	8.50	12.06	8.34	10.36	14.87	8.80	9.97

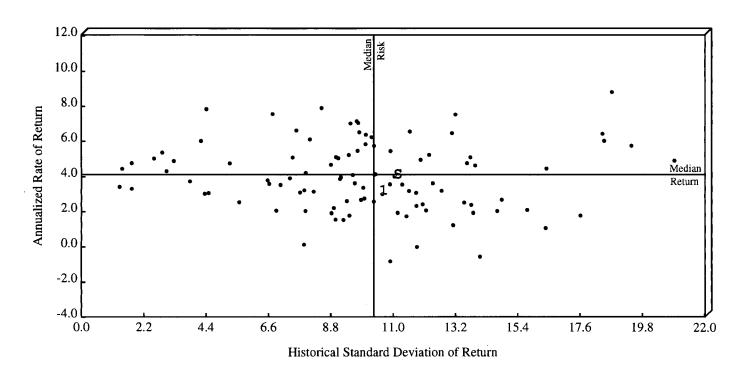
### Policy Index

	Segment	Percent	
Russell 2000	Domestic Equity	4.20	•
Russell 2500	Domestic Equity	4.20	
MSCI World (Gross)	International Equity	26.40	
LB Aggregate	Domestic Fixed Income	35.00	
Citigroup World Govt	Internationa Fixed Income	5.00	
Standard & Poors 500	Domestic Equity	25.20	

### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of Total Fund Public Sponsors Periods Ending 12/04



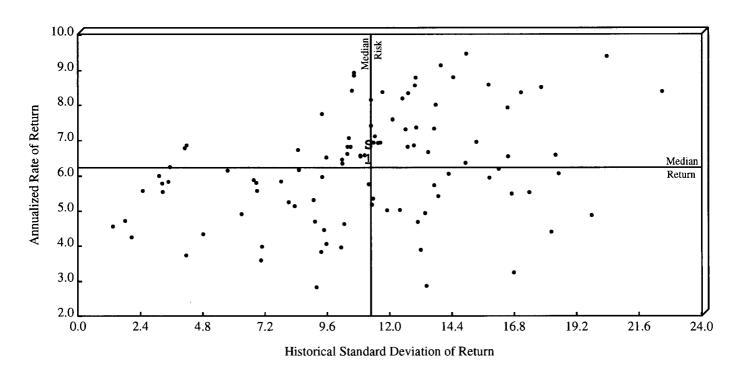
# San Diego Transit Employees Retirement Plan Return vs Risk Total Returns of Total Fund Portfolios 5 Years Ending 12/31/04



		Annualize	Annualized Return		Deviation
		Value	Rank	Value	Rank
S	San Diego Transit Total Fund	4.13	50	11.28	62
1	Policy Index	3.19	66	10.77	58
	Median	4.14		10.33	

# San Diego Transit Employees Retirement Plan Return vs Risk

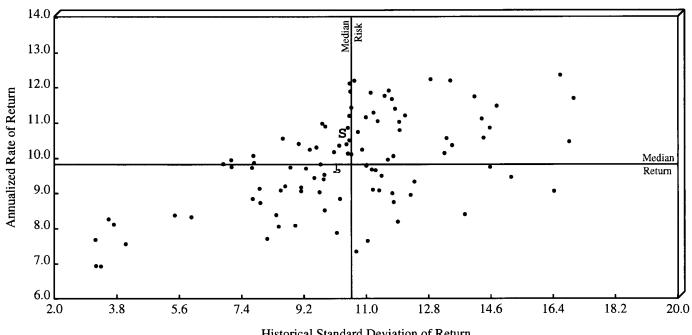
Total Returns of Total Fund Portfolios 7 Years Ending 12/31/04



		Annualized Return		Standard Deviation	
		Value	Rank	Value	Rank
s	San Diego Transit Total Fund	6.87	34	11.31	52
1	Policy Index	6.45	46	11.30	51
	Median	6.25		11.30	

# San Diego Transit Employees Retirement Plan Return vs Risk Total Returns of Total Fund Portfolios

Total Returns of Total Fund Portfolios 10 Years Ending 12/31/04



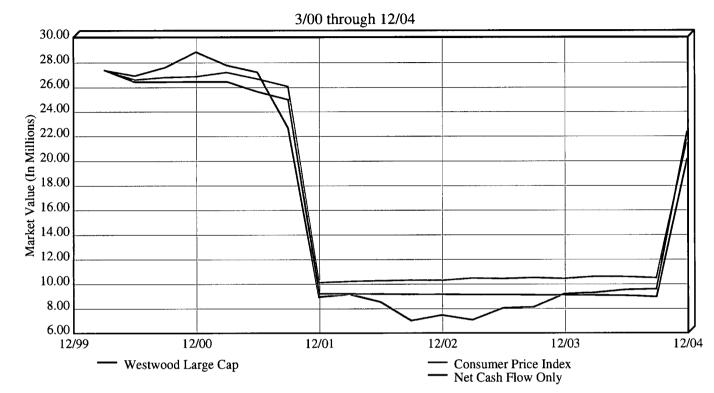
Historical	Standard	Deviation	ot k	leturn
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		Annualized Return		Standard Deviation	
		Value	Rank	Value	Rank
S	San Diego Transit Total Fund	10.69	30	10.40	46
1	Policy Index	9.70	55	10.23	44
	Median	9.84		10.58	

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- 6. Vanguard Explorer Fund
- 7. Kayne Anderson
- 8. Brandes Investment Partners
- 9. Nicholas Applegate
- 10. Banc One Investment Advisors
- 11. PIMCO Total Return Fund II
- 12. Loomis Sayles-Global Bond Fund



## San Diego Transit Employees Retirement Plan Sources of Portfolio Growth Westwood Large Cap

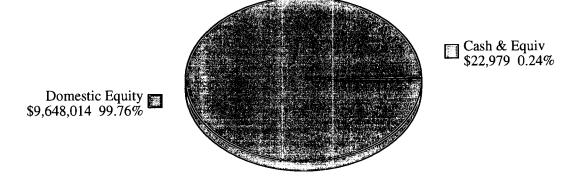


Period Ending	Beginning Value \$(000)	Net Cash Flow	Investment Increment	Ending Value \$(000)	Return	Unit Value
2100				27. 421		100.00
3/00		0.50	<b>500</b>	27,421	1.02	100.00
6/00	27,421	-959	503	26,965	1.82	101.82
9/00	26,965	0	696	27,661	2.58	104.44
12/00	27,661	17	1,239	28,917	4.48	109.12
3/01	28,917	2	-1,086	27,834	-3.75	105.03
6/01	27,834	-808	245	27,271	0.76	105.82
9/01	27,271	-657	-3,883	22,731	-14.58	90.40
12/01	22,731	-15,744	2,057	9,044	11.95	101.20
3/02	9,044	-17	234	9,261	2.59	103.82
6/02	9,261	-18	-602	8,640	-6.52	97.06
9/02	8,640	-17	-1,521	7,102	-17.64	79.94
12/02	7,102	-14	470	7,559	6.63	85.24
3/03	7,559	-15	-381	7,164	-5.04	80.94
6/03	7,164	-14	977	8,127	13.65	91.99
9/03	8,127	-16	100	8,211	1.23	93.12
12/03	8,211	-16	1,081	9,275	13.18	105.39
3/04	9,275	-18	124	9,381	1.34	106.80
6/04	9,381	-18	257	9,621	2.75	109.73
9/04	9,621	-102	153	9,671	1.61	111.50
12/04	9,671	11,205	1,558	22,434	7.85	120.25
Total	27,421	-7,206	2,220	22,434	20.25	120.25

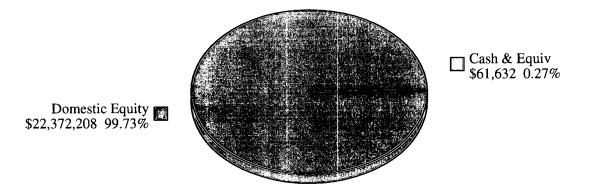
# San Diego Transit Employees Retirement Plan Asset Allocation Westwood Large Cap

September 30, 2004

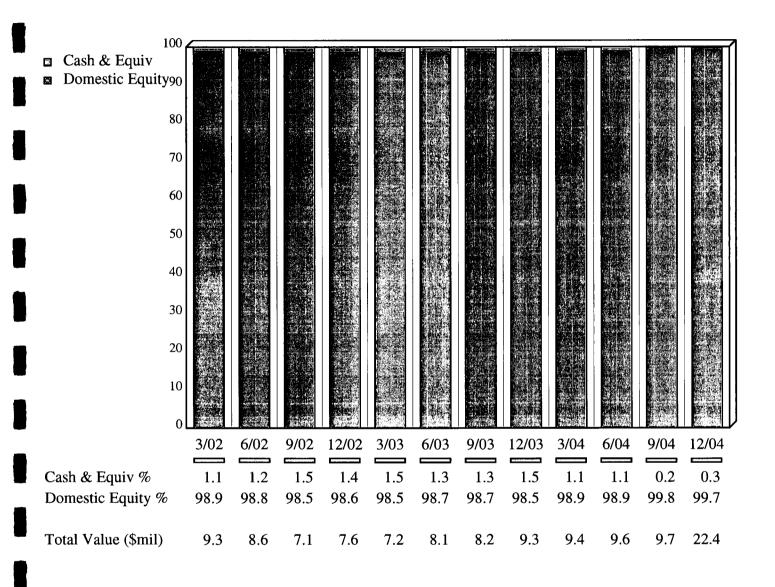
\$9,670,994



December 31, 2004 \$22,433,840



#### San Diego Transit Employees Retirement Plan Asset Allocation Westwood Large Cap



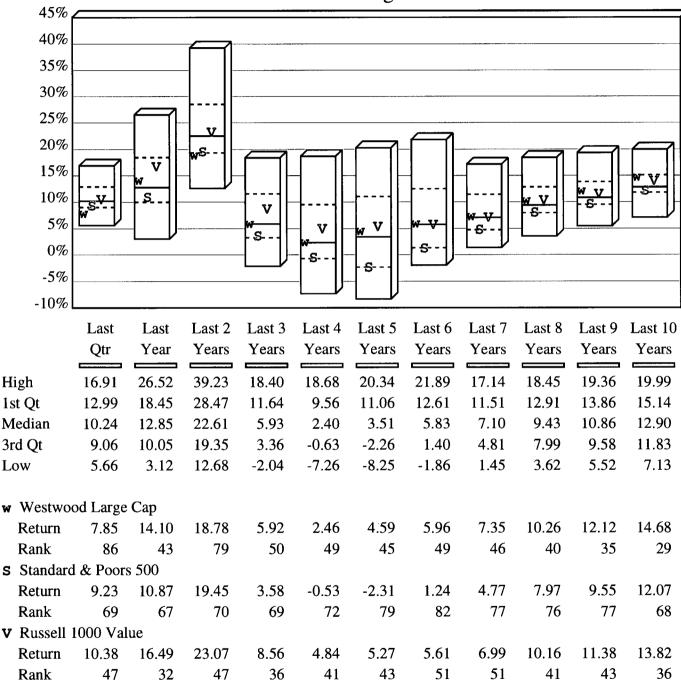
#### San Diego Transit Employees Retirement Plan Performance Overview Westwood Large Cap Returns for Periods Ending December 31, 2004

	Last	Last 2	Last 3	Last	Last 3	Last 5	Since
	Quarter	Quarters	Quarters	Year	Years	Years	3rd Qtr 86
		2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	***************************************		Tanko Sarati u di Lari		A. C. St. Mark Mark 1 1 1 1 1 1
Total Return	7.85	9.58	12.60	14.10	5.92	4.59	12.52
Equity Portfolios Median Return	10.24	8.04	9.56	12.85	5.93	3.51	
Allocation Index Return	9.21	7.18	9.00	10.83	3.59	-2.19	10.38
Policy Index Return	9.23	7.19	9.02	10.87	3.58	-2.31	11.52
Domestic Equity Return	7.95	9.69	12.73	14.26	5.96	4.59	12.83
Equity Segment Median Return	10.48	8.31	9.77	12.98	5.91	1.86	
Standard & Poors 500	9.23	7.19	9.02	10.87	3.58	-2.31	11.52
Cash Return	2.22	2.61	2.77	2.94	1.77	3.25	5.18
91-Day Treasury Bill	0.48	0.85	1.08	1.32	1.42	2.94	4.93

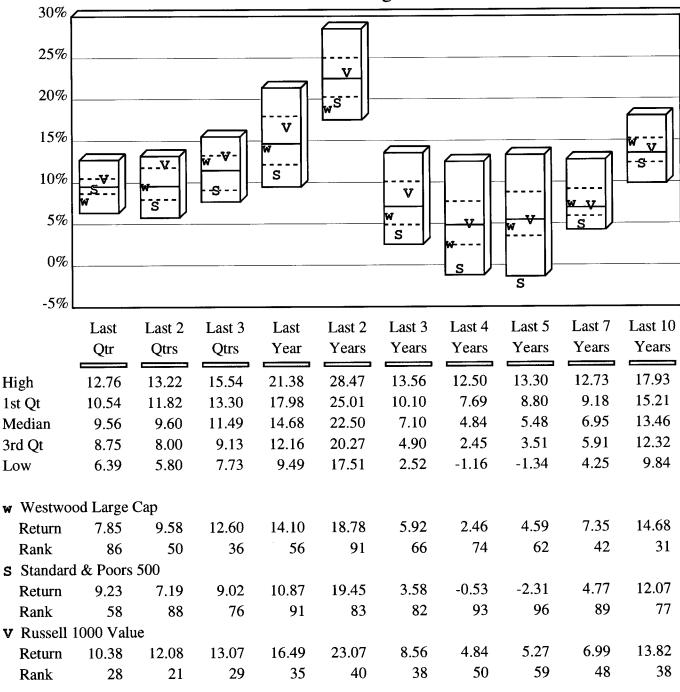
Policy Index

	Segment	Percent
Standard & Poors 500	Domestic Equity	100.00

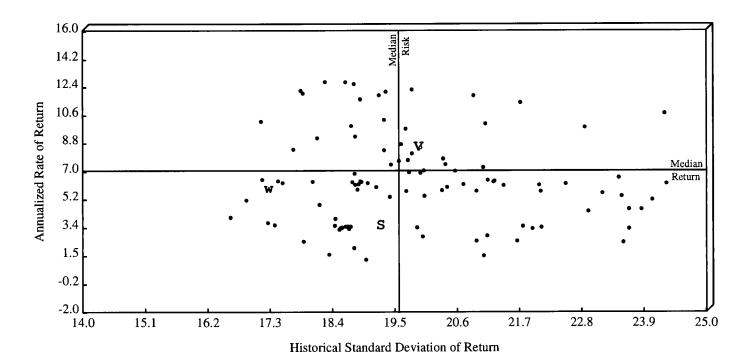
#### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of Equity Portfolios Periods Ending 12/04



#### San Diego Transit Employees Retirement Plan Large Value Cumulative Performance Comparisons Total Returns of Equity Portfolios Periods Ending 12/04

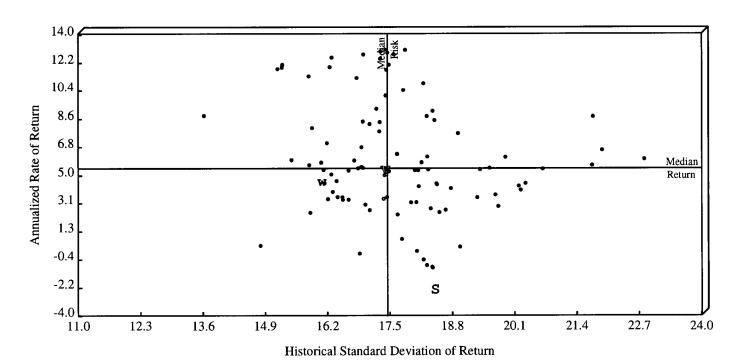


Total Returns of Large Value Portfolios 3 Years Ending 12/31/04



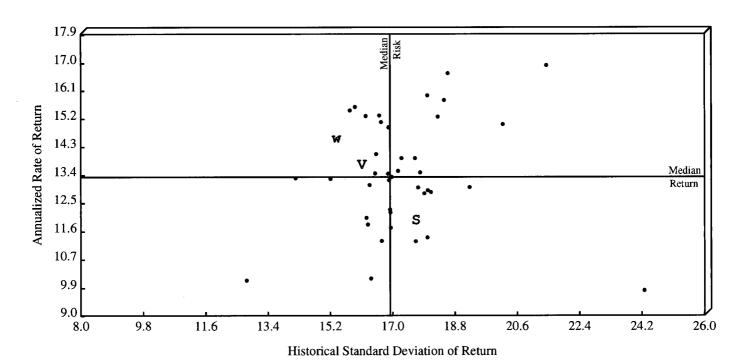
		Annualize	Standard Deviation		
		Value	Rank	Value	Rank
w	Westwood Large Cap	5.92	66	17.33	10
s	Standard & Poors 500	3.58	82	19.31	44
V	Russell 1000 Value	8.56	38	19.98	65
	Median	7.10		19.58	

Total Returns of Large Value Portfolios 5 Years Ending 12/31/04



		Annualize	Standard Deviation		
		Value	Rank	Value	Rank
w	Westwood Large Cap	4.59	62	16.15	13
S	Standard & Poors 500	-2.31	96	18.51	79
V	Russell 1000 Value	5.27	59	17.47	52
	Median	5.48		17.46	

Total Returns of Large Value Portfolios 10 Years Ending 12/31/04

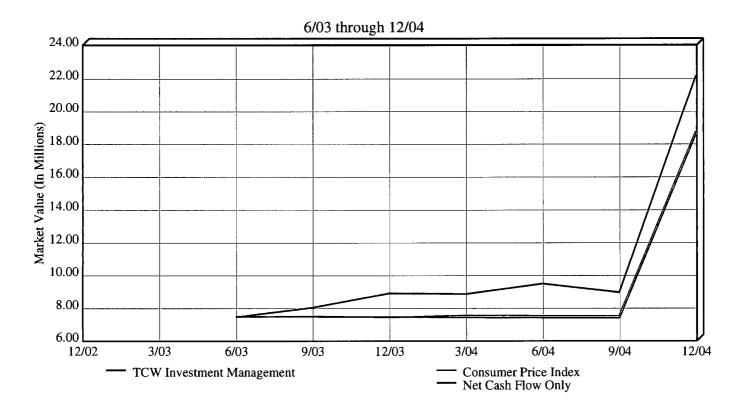


		Annualize	Standard Deviation		
		Value	Rank	Value	Rank
w	Westwood Large Cap	14.68	31	15.47	10
S	Standard & Poors 500	12.07	77	17.77	72
V	Russell 1000 Value	13.82	38	16.20	19
	Median	13.46		16.94	

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- 9. Nicholas Applegate
- 10. Banc One Investment Advisors
- 11. PIMCO Total Return Fund II
- 12. Loomis Sayles-Global Bond Fund



## San Diego Transit Employees Retirement Plan Sources of Portfolio Growth TCW Investment Management

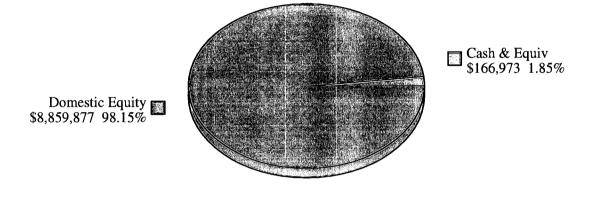


	Period Ending	Beginning Value \$(000)	Net Cash Flow	Investment Increment	Ending Value \$(000)	Return	Unit Value
_	6/03		_		7,533		100.00
	9/03	7,533	-18	587	8,102	7.79	107.79
	12/03	8,102	-19	891	8,975	11.01	119.65
	3/04	8,975	-21	-28	8,926	-0.32	119.27
	6/04	8,926	-21	650	9,555	7.28	127.95
8	9/04	9,555	0	-528	9,027	-5.53	120.88
_	12/04	9,027	11,202	1,988	22,217	11.22	134.45
	Total	7,533	11,124	3,559	22,217	34.45	134.45

#### San Diego Transit Employees Retirement Plan Asset Allocation TCW Investment Management

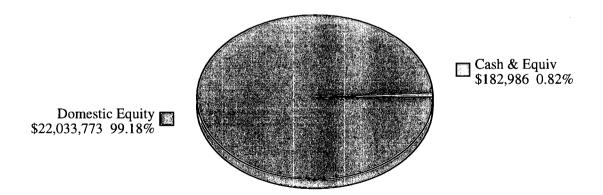
September 30, 2004

\$9,026,849

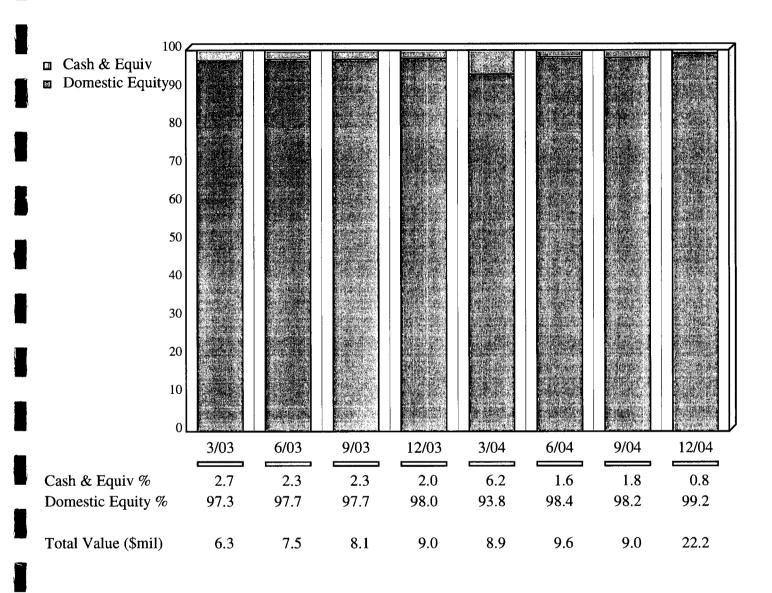


December 31, 2004

\$22,216,758



#### San Diego Transit Employees Retirement Plan Asset Allocation TCW Investment Management



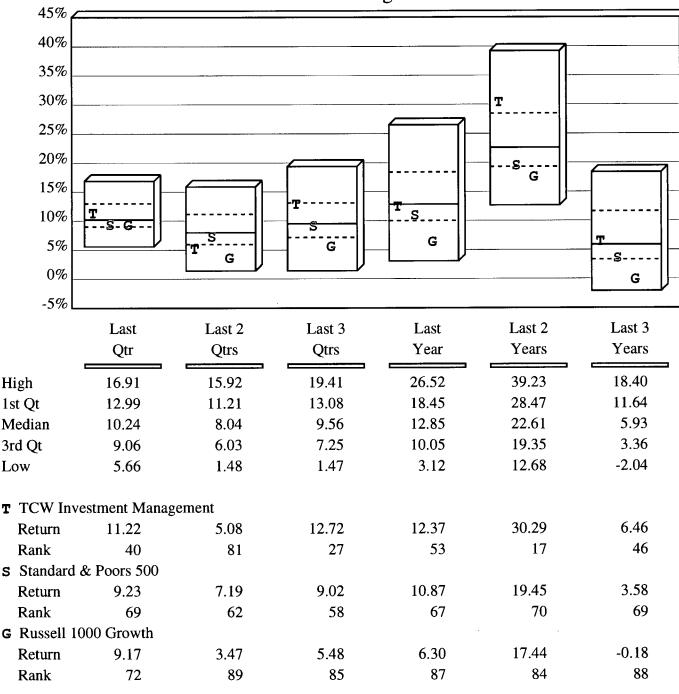
# San Diego Transit Employees Retirement Plan Performance Overview TCW Investment Management Returns for Periods Ending December 31, 2004

	Last	Last 2	Last 3	Last	Last 3	Last 5 Since
	Quarter	Quarters	Quarters	Year	Years	Years 1st Qtr 02
	***************************************		Sec. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.			
Total Return	11.22	5.08	12.72	12.37	6.46	6.46
Equity Portfolios Median Return	10.24	8.04	9.56	12.85	5.93	5.93
Allocation Index Return	9.14	7.13	8.91	10.69	3.60	3.60
Policy Index Return	9.23	7.19	9.02	10.87	3.58	3.58
Domestic Equity Return	11.25	4.93	12.72	12.32	6.53	6.53
Equity Segment Median Return	10.48	8.31	9.77	12.98	5.91	5.91
Russell 1000 Growth	9.17	3.47	5.48	6.30	-0.18	-0.18
Standard & Poors 500	9.23	7.19	9.02	10.87	3.58	3.58
Cash Return	1.04	1.26	1.45	1.58	1.28	1.28
91-Day Treasury Bill	0.48	0.85	1.08	1.32	1.42	1.42

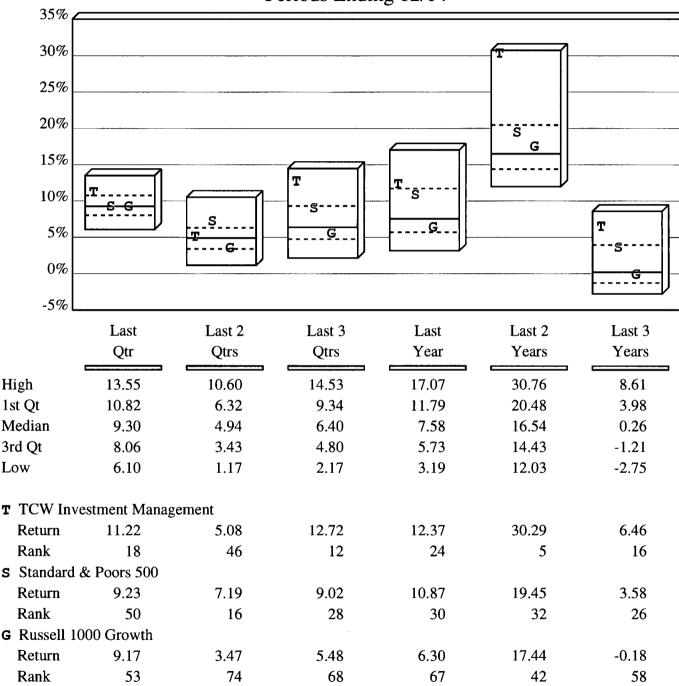
Policy Index

	Segment	Percent
Standard & Poors 500	Domestic Equity	100.00

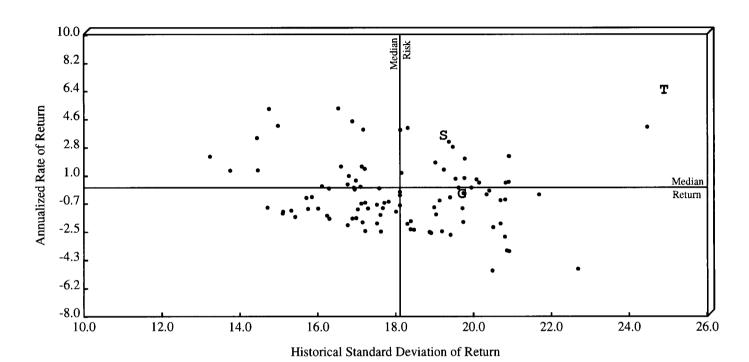
#### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of Equity Portfolios Periods Ending 12/04



# San Diego Transit Employees Retirement Plan Large Growth Cumulative Performance Comparisons Total Returns of Equity Portfolios Periods Ending 12/04



# Total Returns of Large Growth Portfolios 3 Years Ending 12/31/04

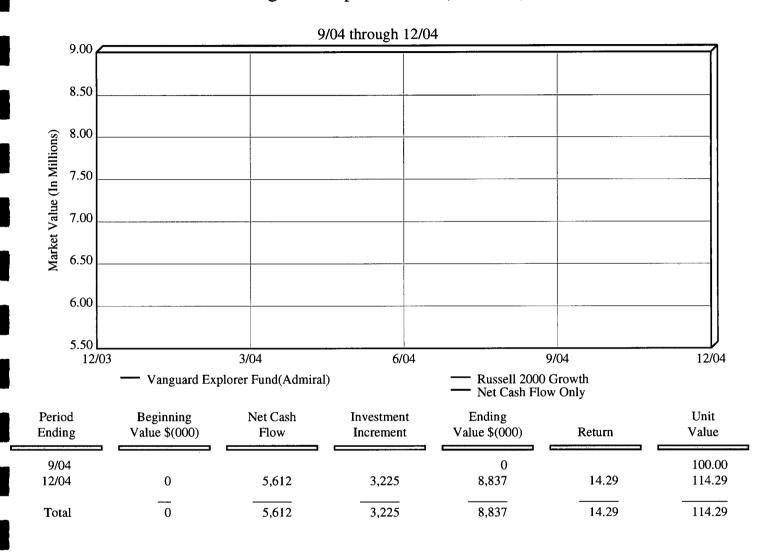


		Annualize	ed Return	Standard Deviation		
		Value	Rank	Value	Rank	
T	TCW Investment Management	6.46	16	24.98	94	
S	Standard & Poors 500	3.58	26	19.31	63	
G	Russell 1000 Growth	-0.18	58	19.78	71	
•	Median	0.26		18.12		

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- 9. Nicholas Applegate
- 10. Banc One Investment Advisors
- 11. PIMCO Total Return Fund II
- 12. Loomis Sayles-Global Bond Fund



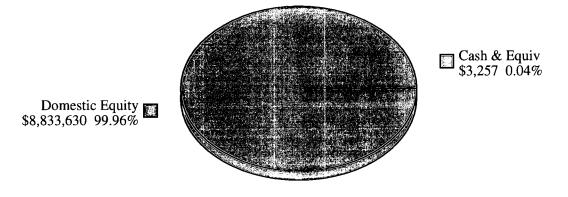
#### San Diego Transit Employees Retirement Plan Sources of Portfolio Growth Vanguard Explorer Fund(Admiral)



# San Diego Transit Employees Retirement Plan Asset Allocation Vanguard Explorer Fund(Admiral)

December 31, 2004

\$8,836,887

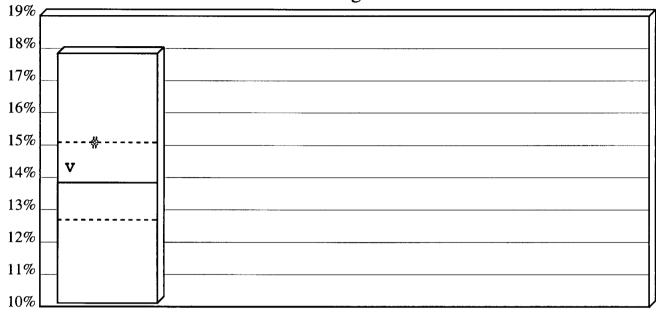


# San Diego Transit Employees Retirement Plan Performance Overview

#### Vanguard Explorer Fund(Admiral) Returns for Periods Ending December 31, 2004

	Last	Last 2	Last 3	Last	Last 3	Last 5	Since
	Quarter	Quarters	Quarters	Year	Years	Years	4th Qtr 04
Total Return	14.29	S				Garage Control Control	14.29
Equity Portfolios Median Return	10.24						10.24
Allocation Index Return	15.07						15.07
Policy Index Return	15.07						15.07
Domestic Equity Return	14.29						14.29
Equity Segment Median Return	10.48						10.48
Russell 2000	14.09						14.09
Russell 2000 Growth	15.07						15.07
Standard & Poors 500	9.23						9.23
Cash Return	0.53						0.53
91-Day Treasury Bill	0.48						0.48
Policy Index							
	15.50	Segment			Percent		
Russell 2000 Growth	Do	mestic Eq	uity		100.00		

#### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of Small Cap Growth Equity Mutual Funds Periods Ending 12/04



	Qtr
High	17.84
1st Qt	15.09
Median	13.85
3rd Qt	12.70
Low	10.12

v Vanguard Explorer Fund(Admiral)

Last

Return 14.29 Rank 41

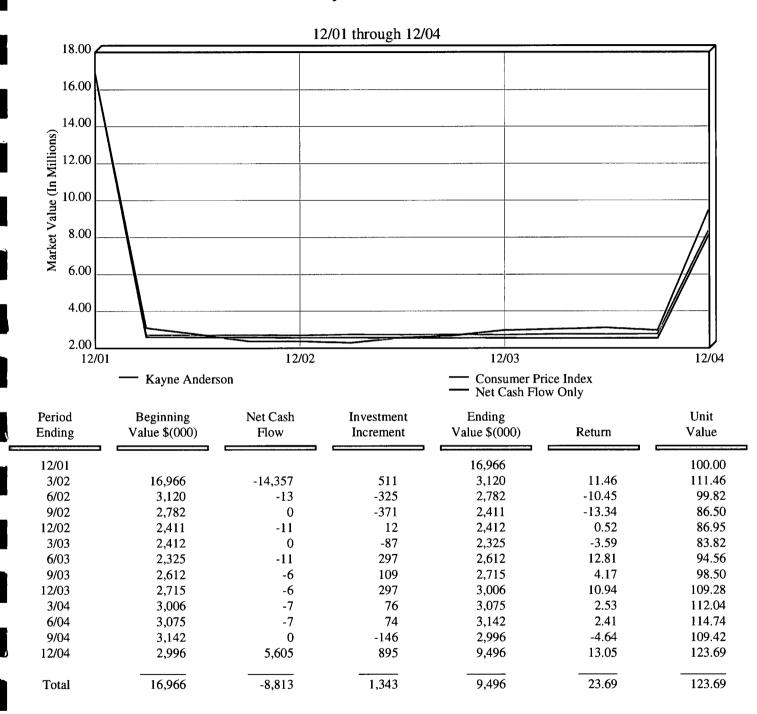
# Russell 2000 Growth

Return 15.07 Rank 25

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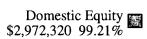
#### San Diego Transit Employees Retirement Plan Sources of Portfolio Growth Kayne Anderson

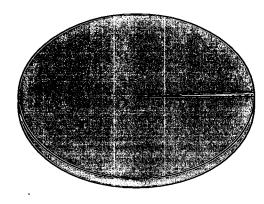


#### San Diego Transit Employees Retirement Plan Asset Allocation Kayne Anderson

September 30, 2004

\$2,996,137

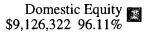


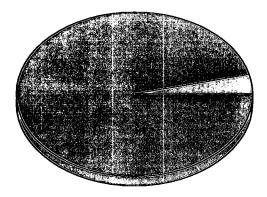


Cash & Equiv \$23,817 0.79%

December 31, 2004

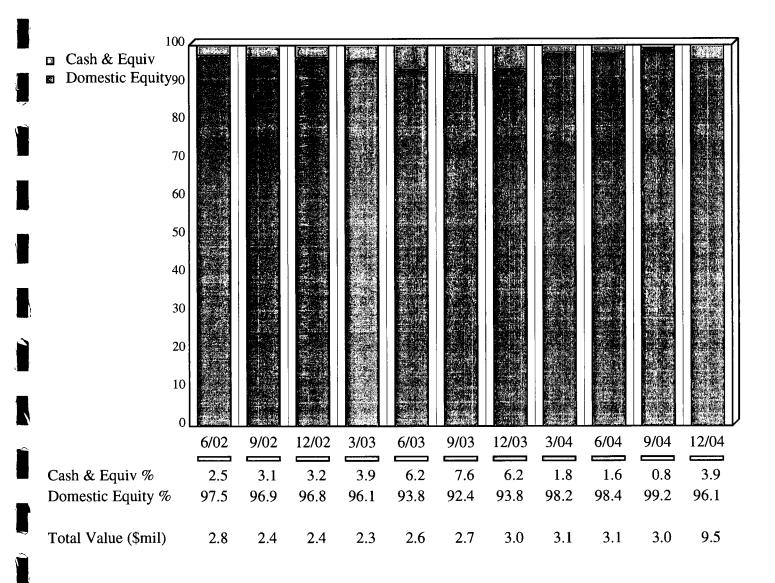
\$9,495,674





Cash & Equiv \$369,351 3.89%

#### San Diego Transit Employees Retirement Plan Asset Allocation Kayne Anderson



#### San Diego Transit Employees Retirement Plan Performance Overview

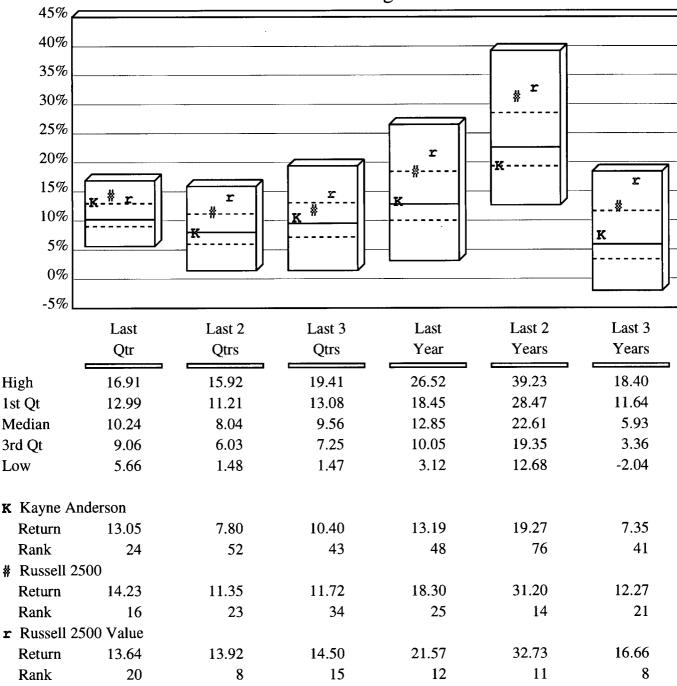
# Kayne Anderson Returns for Periods Ending December 31, 2004

Last	Last 2	Last 3	Last	Last 3	Last 5 Since
Quarter	Quarters	Quarters	Year	Years	Years 1st Qtr 02
13.05	7.80	10.40	13.19	7.35	7.35
10.24	8.04	9.56	12.85	5.93	5.93
13.80	10.96	11.34	17.64	11.52	11.52
14.23	11.35	11.72	18.30	12.27	12.27
13.06	7.65	10.35	13.20	7.95	7.95
10.48	8.31	9.77	12.98	5.91	5.91
14.23	11.35	11.72	18.30	12.27	12.27
13.64	13.92	14.50	21.57	16.66	16.66
9.23	7.19	9.02	10.87	3.58	3.58
0.38	0.71	0.85	1.08	1.11	1.11
0.48	0.85	1.08	1.32	1.42	1.42
	13.05 10.24 13.80 14.23 13.06 10.48 14.23 13.64 9.23	Quarter       Quarters         13.05       7.80         10.24       8.04         13.80       10.96         14.23       11.35         13.06       7.65         10.48       8.31         14.23       11.35         13.64       13.92         9.23       7.19         0.38       0.71	Quarter         Quarters         Quarters           13.05         7.80         10.40           10.24         8.04         9.56           13.80         10.96         11.34           14.23         11.35         11.72           13.06         7.65         10.35           10.48         8.31         9.77           14.23         11.35         11.72           13.64         13.92         14.50           9.23         7.19         9.02           0.38         0.71         0.85	Quarter         Quarters         Quarters         Year           13.05         7.80         10.40         13.19           10.24         8.04         9.56         12.85           13.80         10.96         11.34         17.64           14.23         11.35         11.72         18.30           13.06         7.65         10.35         13.20           10.48         8.31         9.77         12.98           14.23         11.35         11.72         18.30           13.64         13.92         14.50         21.57           9.23         7.19         9.02         10.87           0.38         0.71         0.85         1.08	Quarter         Quarters         Quarters         Year         Years           13.05         7.80         10.40         13.19         7.35           10.24         8.04         9.56         12.85         5.93           13.80         10.96         11.34         17.64         11.52           14.23         11.35         11.72         18.30         12.27           13.06         7.65         10.35         13.20         7.95           10.48         8.31         9.77         12.98         5.91           14.23         11.35         11.72         18.30         12.27           13.64         13.92         14.50         21.57         16.66           9.23         7.19         9.02         10.87         3.58           0.38         0.71         0.85         1.08         1.11

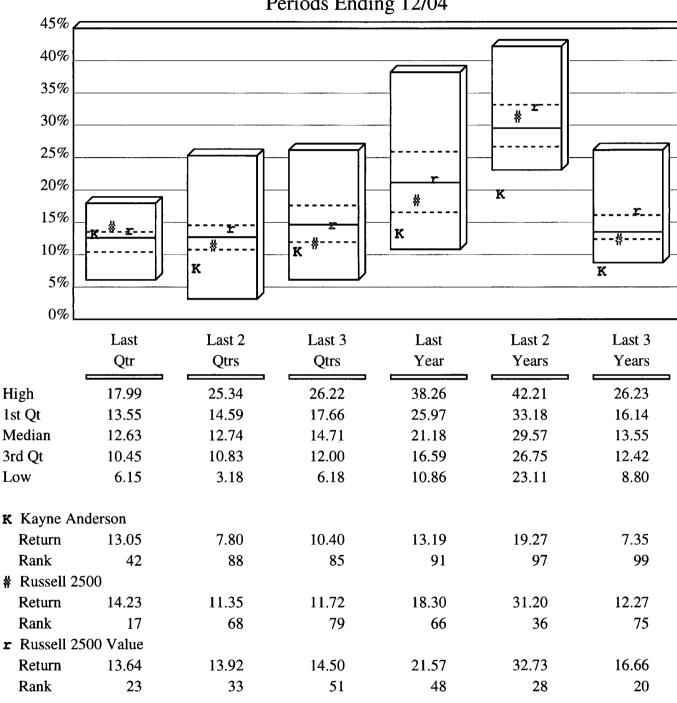
Policy Index

Russell 2500 Domestic Equity 100.00

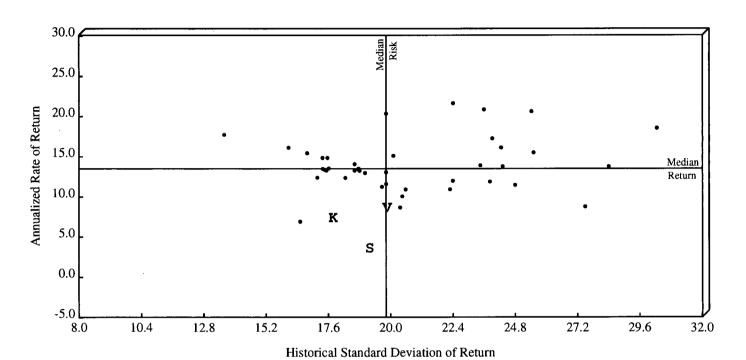
#### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of Equity Portfolios Periods Ending 12/04



#### San Diego Transit Employees Retirement Plan Midcap Value Cumulative Performance Comparisons Total Returns of Equity Portfolios Periods Ending 12/04



#### San Diego Transit Employees Retirement Plan Return vs Risk Total Returns of Midcap Value Portfolios 3 Years Ending 12/31/04

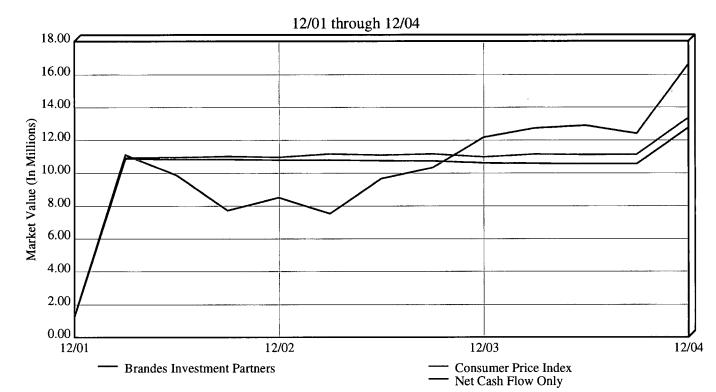


		Annualize	Standard Deviation		
		Value	Rank	Value	Rank
K	Kayne Anderson	7.35	99	17.90	31
s	Standard & Poors 500	3.58	100	19.31	49
V	Russell 1000 Value	8.56	99	19.98	54
	Median	13.55		19.84	

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- 12. Loomis Sayles-Global Bond Fund



## San Diego Transit Employees Retirement Plan Sources of Portfolio Growth Brandes Investment Partners

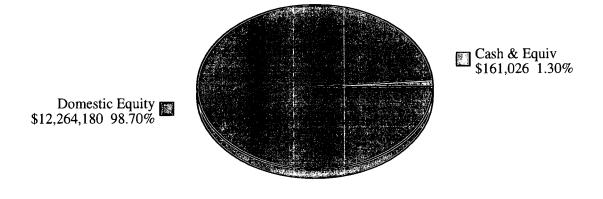


Period Ending	Beginning Value \$(000)	Net Cash Flow	Investment Increment	Ending Value \$(000)	Return	Unit Value	
12/01				1,244		100.00	
3/02	1,244	9,665	246	11,155	2.61	102.61	
6/02	11,155	-49	-1,203	9,903	-10.83	91.50	
9/02	9,903	0	-2,133	7,770	-21.54	71.79	
12/02	7,770	-40	826	8,556	10.64	79.43	
3/03	8,556	0	-971	7,585	-11.35	70.42	
6/03	7,585	-37	2,155	9,702	28.45	90.45	
9/03	9,702	-23	689	10,368	7.10	96.87	
12/03	10,368	-124	1,963	12,208	19.02	115.30	
3/04	12,208	-28	576	12,755	4.72	120.73	
6/04	12,755	-29	199	12,925	1.57	122.63	
9/04	12,925	0	-500	12,425	-3.87	117.89	
12/04	12,425	2,163	2,027	16,615	14.53	135.02	
Total	1,244	11,497	3,874	16,615	35.02	135.02	

#### San Diego Transit Employees Retirement Plan Asset Allocation Brandes Investment Partners

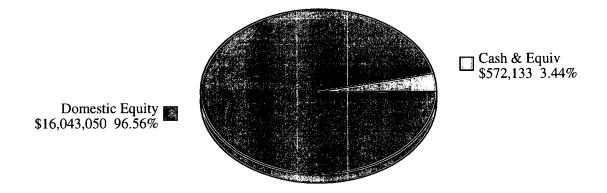
September 30, 2004

\$12,425,206

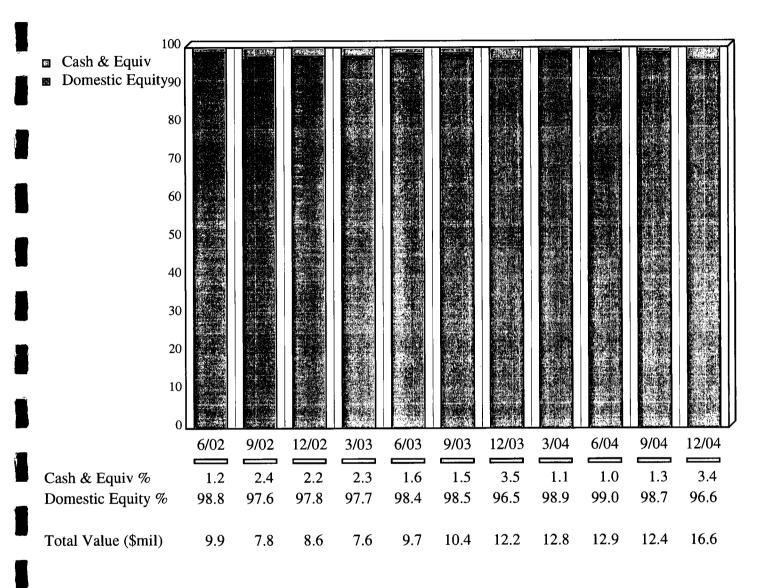


December 31, 2004

\$16,615,183



#### San Diego Transit Employees Retirement Plan Asset Allocation Brandes Investment Partners



#### San Diego Transit Employees Retirement Plan Performance Overview Brandes Investment Partners Returns for Periods Ending December 31, 2004

	Last	Last 2	Last 3	Last	Last 3	Last 5	Since
	Quarter	Quarters	Quarters	Year	Years	Years	1st Qtr 02
Total Return	14.53	10.10	11.83	17.11	10.53		10.53
Intl Equity Portfolios Median Return	14.37	14.38	14.11	19.88	12.76		12.76
Allocation Index Return	9.01	7.00	8.81	10.62	3.55		3.55
Policy Index Return	12.05	11.04	12.19	15.25	7.44		7.44
Policy Index							

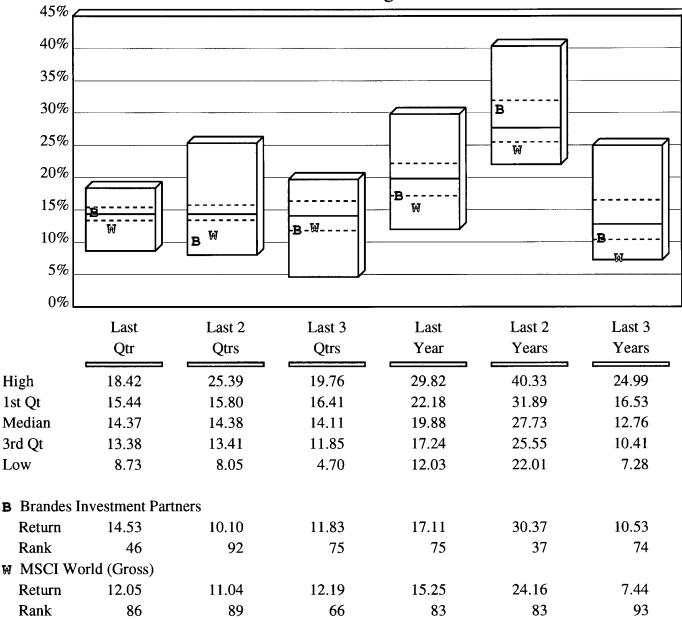
Policy Index

MSCI World (Gross)

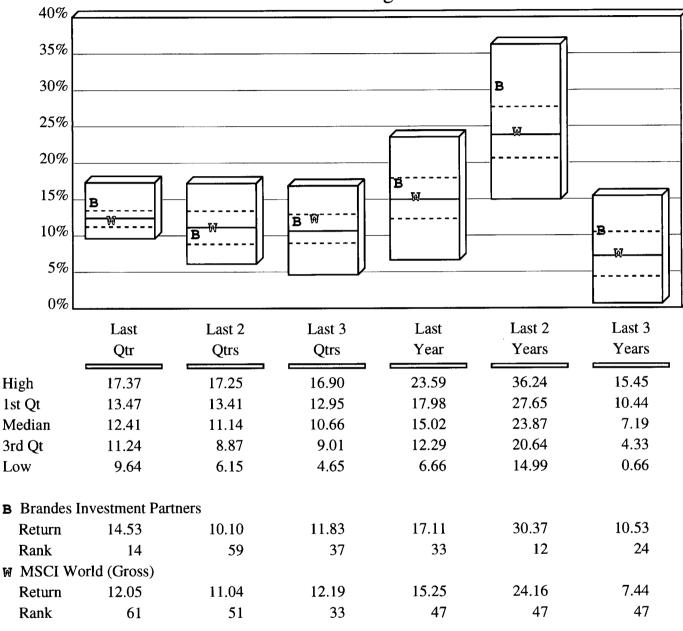
Segment Percent

International Equity 100.00

### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of International Equity Portfolios Periods Ending 12/04



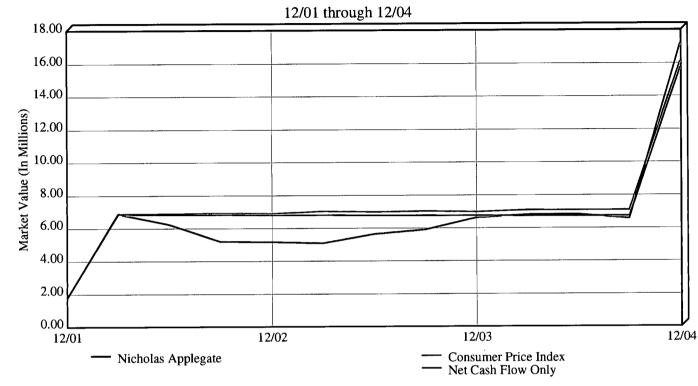
### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of Global Equity Mutual Funds Periods Ending 12/04



- 1. Executive Summary
- 2. Capital Markets Overview
- 3. Total Retirement Fund
- 4. Westwood Large Cap Portfolio
- 5. TCW Investment Management
- 6. Vanguard Explorer Fund
- 7. Kayne Anderson
- 8. Brandes Investment Partners
- 9. Nicholas Applegate
- 10. Banc One Investment Advisors
- 11. PIMCO Total Return Fund II
- 12. Loomis Sayles-Global Bond Fund



### San Diego Transit Employees Retirement Plan Sources of Portfolio Growth Nicholas Applegate

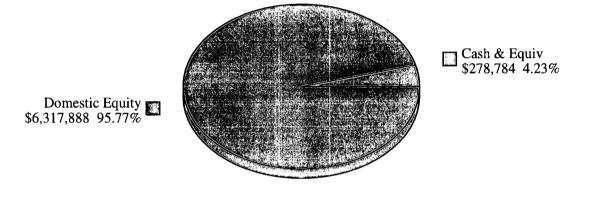


Period Ending	Beginning Value \$(000)	Net Cash Flow	Investment Increment	Ending Value \$(000)	Return	Unit Value
12/01			yi, l winini	1,775		100.00
3/02	1,775	5,100	40	6,915	0.54	100.54
6/02	6,915	-30	-606	6,279	-8.79	91.70
9/02	6,279	0	-1,041	5,238	-16.58	76.50
12/02	5,238	-26	-3	5,208	-0.08	76.44
3/03	5,208	0	-76	5,132	-1.47	75.32
6/03	5,132	-24	567	5,675	11.06	83.65
9/03	5,675	-13	279	5,941	4.91	87.76
12/03	5,941	-14	737	6,664	12.42	98.66
3/04	6,664	-15	202	6,851	3.03	101.64
6/04	6,851	-16	21	6,856	0.31	101.96
9/04	6,856	0	-259	6,597	-3.78	98.10
12/04	6,597	9,015	1,610	17,222	11.78	109.66
Total	1,775	13,976	1,471	17,222	9.66	109.66

### San Diego Transit Employees Retirement Plan Asset Allocation Nicholas Applegate

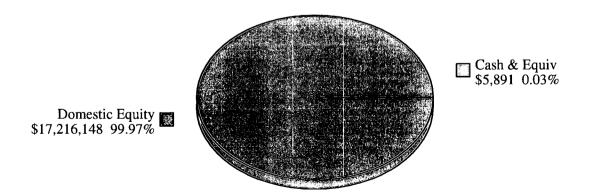
September 30, 2004

\$6,596,672

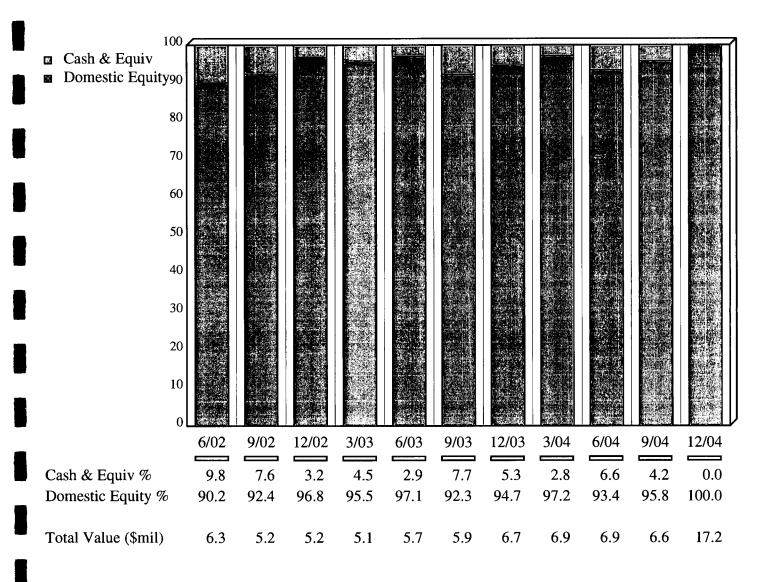


December 31, 2004

\$17,222,039



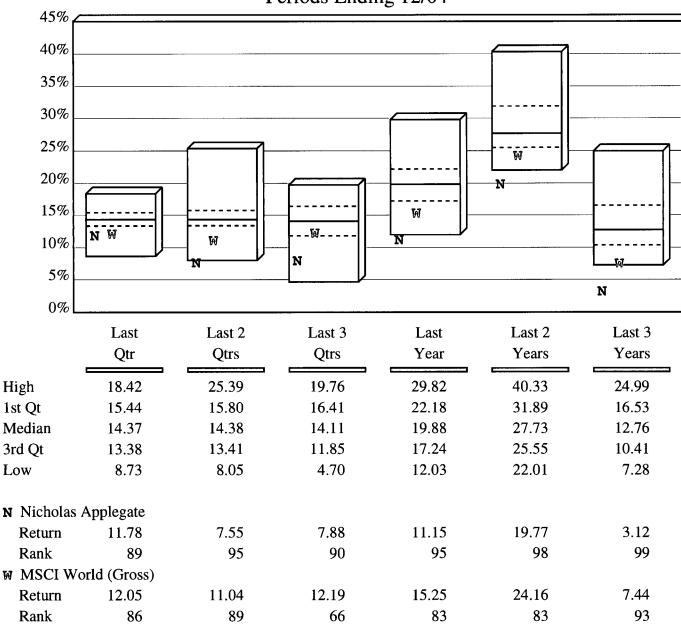
### San Diego Transit Employees Retirement Plan Asset Allocation Nicholas Applegate



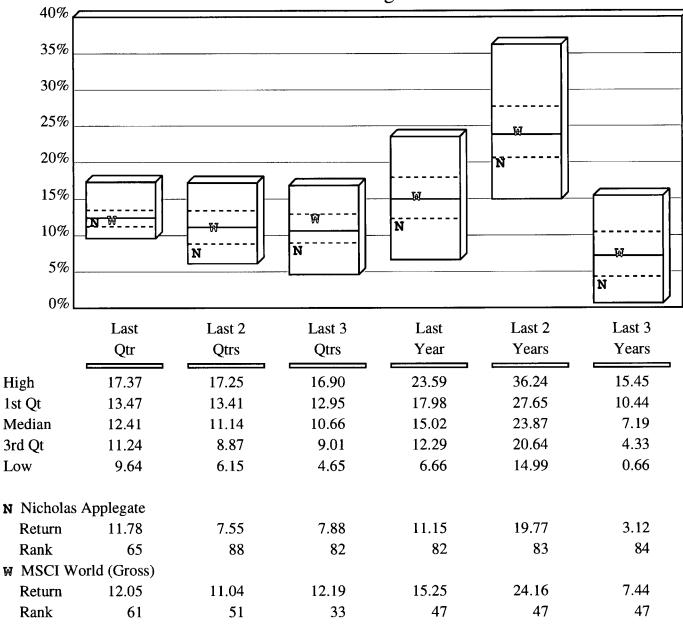
### San Diego Transit Employees Retirement Plan Performance Overview Nicholas Applegate Returns for Periods Ending December 31, 2004

	Last	Last 2	Last 3	Last	Last 3	Last 5	Since
	Quarter	Quarters	Quarters	Year	Years	Years	1st Qtr 02
m . 1 D .	11.70	7.55	7.00	11 15	2 10		2 12
Total Return	11.78	7.55	7.88	11.15	3.12		3.12
Intl Equity Portfolios Median Return	14.37	14.38	14.11	19.88	12.76		12.76
Allocation Index Return	9.13	7.22	8.98	10.76	4.03		4.03
Policy Index Return	12.05	11.04	12.19	15.25	7.44		7.44
Policy Index		Caamant			Dargant		
		Segment			Percent		
MSCI World (Gross)	Intern	national E	quity		100.00	<del>-</del>	

### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of International Equity Portfolios Periods Ending 12/04



### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of Global Equity Mutual Funds Periods Ending 12/04

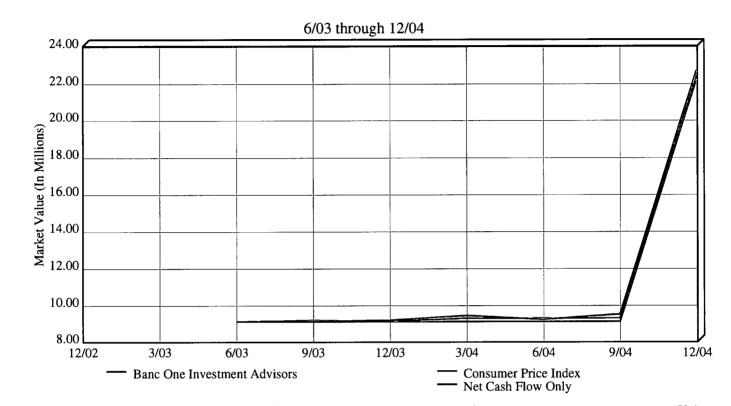




- 2. Capital Markets Overview
- 3. Total Retirement Fund
- 4. Westwood Large Cap Portfolio
- 5. TCW Investment Management
- 6. Vanguard Explorer Fund
- 7. Kayne Anderson
- 8. Brandes Investment Partners
- 9. Nicholas Applegate
- 10. Banc One Investment Advisors
- 11. PIMCO Total Return Fund II
- 12. Loomis Sayles-Global Bond Fund



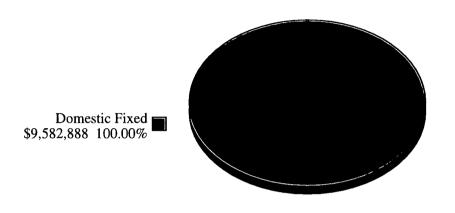
### San Diego Transit Employees Retirement Plan Sources of Portfolio Growth Banc One Investment Advisors



	Period Ending	Beginning Value \$(000)	Net Cash Flow	Investment Increment	Ending Value \$(000)	Return	Unit Value
-	6/03				9,154		100.00
	9/03	9,154	0	36	9,189	0.38	100.38
	12/03	9,189	0	68	9,257	0.74	101.12
	3/04	9,257	0	254	9,511	2.75	103.90
	6/04	9,511	0	-213	9,298	-2.24	101.57
	9/04	9,298	0	285	9,583	3.06	104.68
	12/04	9,583	13,095	62	22,739	0.96	105.68
	Total	9,154	13,095	491	22,739	5.68	105.68

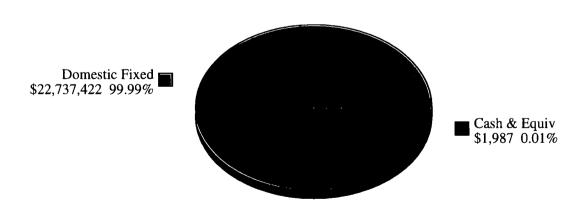
### San Diego Transit Employees Retirement Plan Asset Allocation Banc One Investment Advisors

September 30, 2004 \$9,582,888



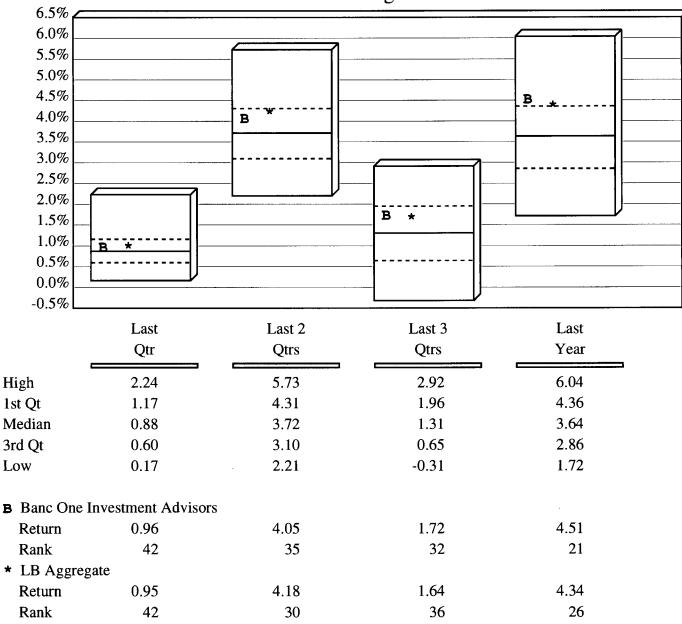
December 31, 2004

\$22,739,409



### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison

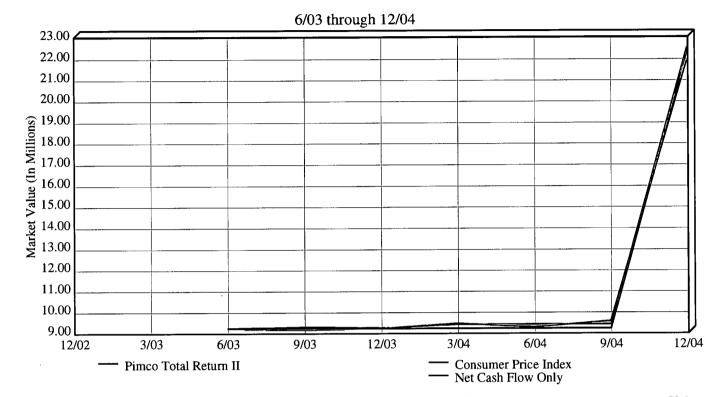
Total Returns of Intermediate Term Fixed Income Mutual Funds Periods Ending 12/04



- 1. Executive Summary
- 2. Capital Markets Overview
- 3. Total Retirement Fund
- 4. Westwood Large Cap Portfolio
- 5. TCW Investment Management
- 6. Vanguard Explorer Fund
- 7. Kayne Anderson
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- 9. Nicholas Applegate
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- 11. PIMCO Total Return Fund II
- 12. Loomis Sayles-Global Bond Fund



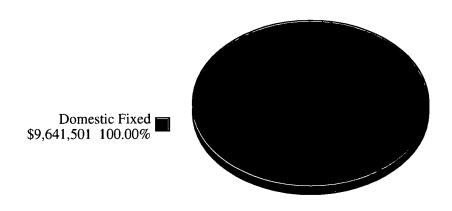
### San Diego Transit Employees Retirement Plan Sources of Portfolio Growth Pimco Total Return II



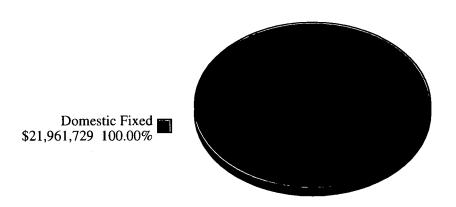
	Period Ending	Beginning Value \$(000)	Net Cash Flow	Investment Increment	Ending Value \$(000)	Return	Unit Value
_	6/03				9,269		100.00
	9/03	9,269	0	-35	9,233	-0.38	99.62
-	12/03	9,233	0	56	9,289	0.60	100.22
	3/04	9,289	0	236	9,525	2.54	102.77
	6/04	9,525	0	-180	9,345	-1.89	100.82
	9/04	9,345	0	296	9,642	3.17	104.02
	12/04	9,642	13,095	-775	21,962	0.47	104.51
	Total	9,269	13,095	-402	21,962	4.51	104.51

### San Diego Transit Employees Retirement Plan Asset Allocation Pimco Total Return II

September 30, 2004 \$9,641,501

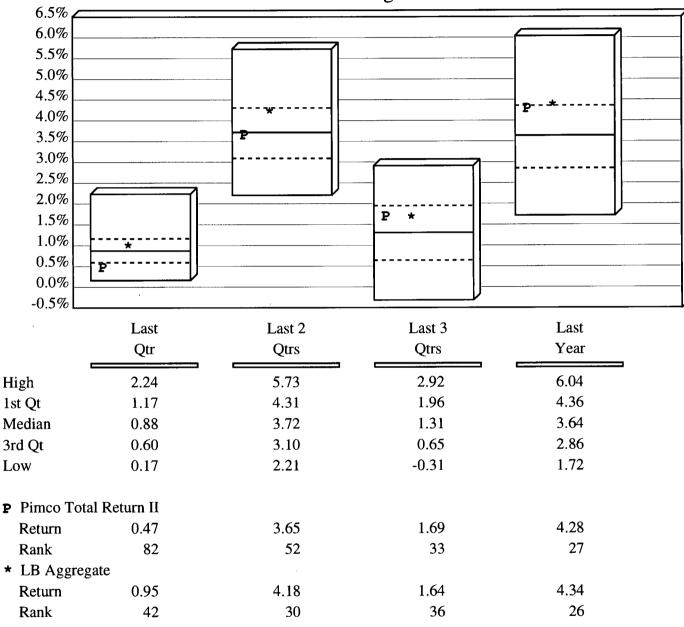


December 31, 2004 \$21,961,729



# San Diego Transit Employees Retirement Plan Cumulative Performance Comparison al Returns of Intermediate Term Fixed Income Mutual F

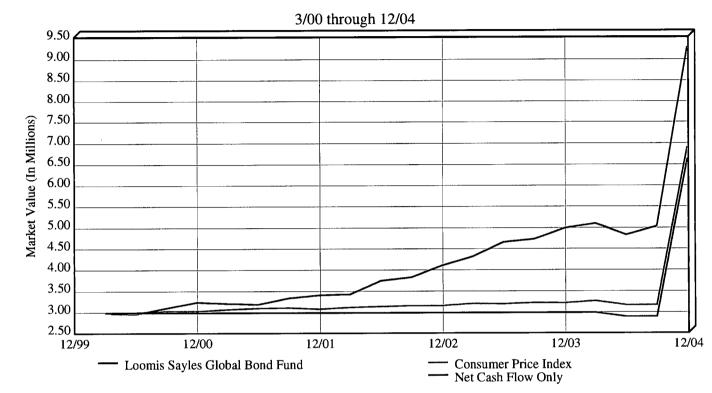
Total Returns of Intermediate Term Fixed Income Mutual Funds Periods Ending 12/04



- 1. Executive Summary
- 2. Capital Markets Overview
- 3. Total Retirement Fund
- 4. Westwood Large Cap Portfolio
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- 11. PIMCO Total Return Fund II
- 12. Loomis Sayles-Global Bond Fund



### San Diego Transit Employees Retirement Plan Sources of Portfolio Growth Loomis Sayles Global Bond Fund

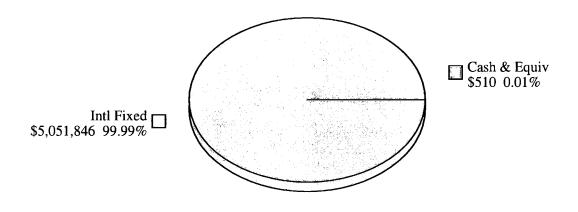


Period Ending	Beginning Value \$(000)	Net Cash Flow	Investment Increment	Ending Value \$(000)	Return	Unit Value
3/00				3,004		100.00
6/00	3,004	0	-21	2,982	-0.70	99.30
9/00	2,982	0	139	3,122	4.67	103.94
12/00	3,122	0	143	3,265	4.59	108.70
	3,265	0	-30	3,235	-0.93	107.69
3/01 6/01	3,235	0	-24	3,210	-0.75	106.89
9/01	3,210	0	152	3,362	4.73	111.94
10/01	3,362	0	70	3,432	2.08	114.26
3/02	3,432	0	18	3,450	0.53	114.87
6/02	3,450	0	319	3,769	9.23	125.47
9/02	3,769	0	79	3,847	2.09	128.10
12/02	3,847	0	282	4,129	7.33	137.48
12/02 3/03	4,129	0	209	4,338	5.06	144.44
6/03	4,338	0	337	4,676	7.77	155.67
9/03	4,676	0	73	4,749	1.56	158.10
12/03	4,749	0	261	5,010	5.49	166.79
3/04	5,010	0	106	5,115	2.11	170.31
6/04	5,115	-100	-167	4,848	-3.26	164.75
9/04	4,848	0	204	5,052	4.21	171.69
12/04	5,052	3,741	496	9,289	6.75	183.28
Total	3,004	3,641	2,645	9,289	83.28	183.28

### San Diego Transit Employees Retirement Plan Asset Allocation Loomis Sayles Global Bond Fund

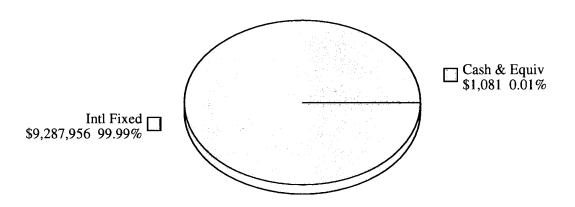
September 30, 2004

\$5,052,357

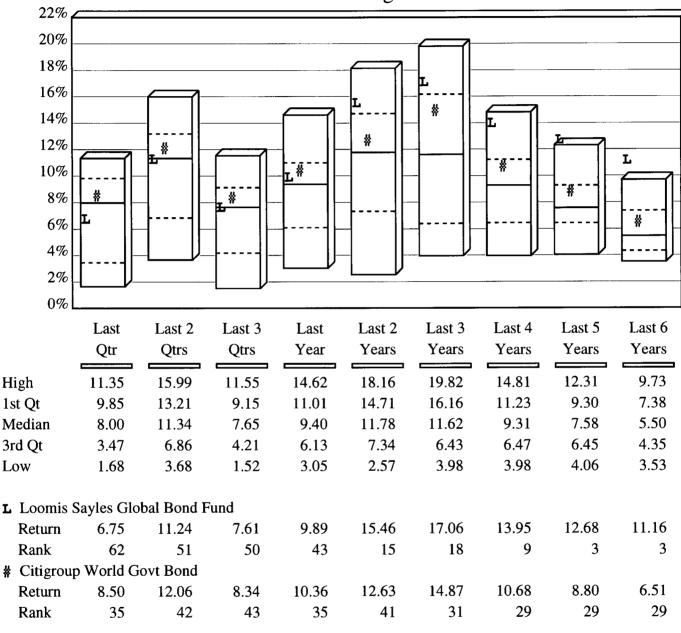


December 31, 2004

\$9,289,037

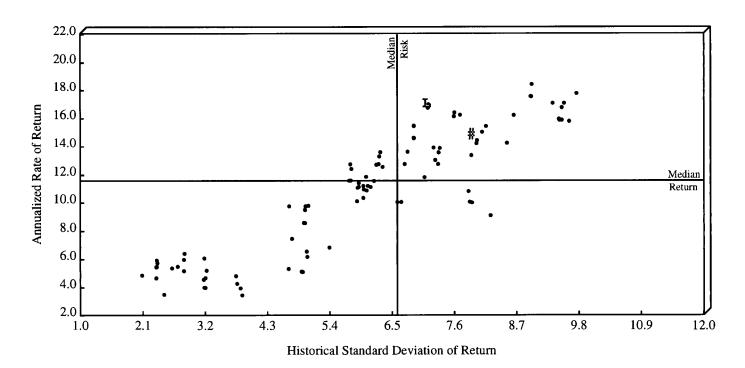


### San Diego Transit Employees Retirement Plan Cumulative Performance Comparison Total Returns of Global Fixed Income Mutual Funds Periods Ending 12/04



### San Diego Transit Employees Retirement Plan Return vs Risk

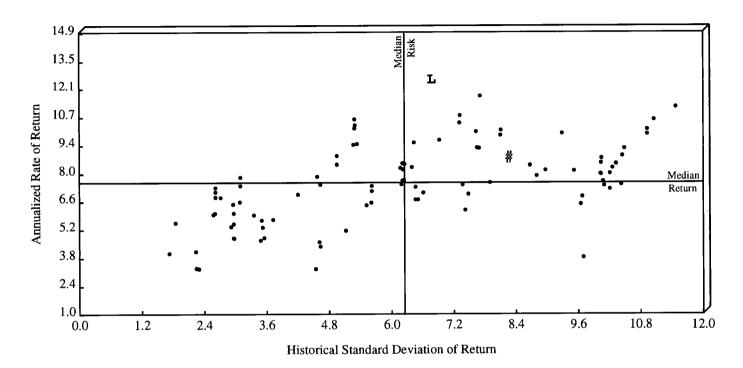
Total Returns of Global Fixed Income Mutual Funds 3 Years Ending 12/31/04



		Annualize	ed Return	Standard	Deviation
		Value	Rank	Value	Rank
L	Loomis Sayles Global Bond Fund	17.06	18	7.17	63
#	Citigroup World Govt Bond	14.87	31	7.96	75
	Median	11.62		6.60	

### San Diego Transit Employees Retirement Plan Return vs Risk Total Returns of Global Fixed Income Mutual Funds

Total Returns of Global Fixed Income Mutual Funds 5 Years Ending 12/31/04



		Annualize	ed Return	Standard	Deviation
		Value	Rank	Value	Rank
L	Loomis Sayles Global Bond Fund	12.68	3	6.84	58
#	Citigroup World Govt Bond	8.80	29	8.33	. 72
	Median	7.58		6.26	

### Ten Year: Periodic Table of Investment Returns

1985	1986	1987	1988	1989	1990	1991	1992	1993	1994
MSCI EAFE 58.72%	MSCI EAFE 69.94%	MSCI EAFE 24.93%	Russell 2000 Value 29.47%	S&P Growth 36.40%	Citigroup World Govt Bond 12.00%	Russell 2000 Growth 51.19%	Russell 2000 Value 29.14%	MSCI EAFE 32.94%	MSCI EAFE 8.06%
S&P Growth 33.31%	Citigroup World Govt Bond 23.06%	Citigroup World Govt Bond 18.42%	MSCI EAFE 28.59%	S&P 500 31.69%	Lehman Aggregate 8.96%	Lehman High Yield 46.19%	Russell 2000 18.41%	Russell 2000 Value 23.84%	S&P Growth 3.13%
S&P 500 31.73%	<b>SaP</b> <b>Value</b> 21.67%	S&P Growth 6.50%	Russell 2000 24.89%	<b>S&amp;P</b> <b>Value</b> 26.13%	S&P Growth 0.20%	Russell 2000 46.05%	Lehman High Yield 15.75%	Russell 2000 18.91%	Wilshire REIT 2.66%
Russell 2000 31.05%	Wilshire REIT 19.74%	S&P 500 5.25%	<b>S&amp;P</b> <b>Value</b> 21.6 <b>7%</b>	Russell 2000 Growth 20.17%	S&P 500 -3.10%	Russell 2000 Value 41.70%	Wilshire REIT 15.13%	<b>S&amp;P</b> <b>Value</b> 18.80%	Citigroup World Govt Bond 2.37%
Russell 2000 Value 31.01%	S&P 500 18.67%	Lehmen High Yield 4.99%	Russell 2000 Growth 20.37%	Russell 2000 16.24%	<b>S&amp;P</b> <b>Value</b> -6.85%	S&P Growth 38.37%	<b>SSP</b> <b>Value</b> 10.53%	Lehmen High Yield 17.12%	S&P 500 1.32%
Russell 2000 Growth 30.97%	Lehman High Yield 17.45%	<b>SGP</b> <b>Value</b> 3.68%	Wilshire REIT 17.48%	Lehman Aggregate 14.53%	Lehmen High Yield -9.59%	S&P 500 30.46%	Russell 2000 Growth 7.77%	Wilshire REIT 15.14%	<b>SEP</b> <b>Value</b> -0.64%
<b>S&amp;P</b> Value 29.63%	Lehman Aggregate 15.28%	Lehman Aggregate 2.76%	S&P 500 16.61%	Russell 2000 Value 12.43%	Russell 2000 Growth -17.41%	Wilshire REIT 23.84%	S&P 500 7.62%	Russell 2000 Growth 13.36%	Lehmen High Yield -1.03%
Citigroup World Govt Bond 27.25%	S&P Growth 14.50%	Wilshire REIT -6.59%	Lehman High Yield 12.53%	MSCI EAFE 10.80%	Russell 2000 -19.51%	<b>S&amp;P</b> <b>Value</b> 22.56%	Lehmen Aggregate 7.40%	Citigroup World Govt Bond 13.28%	Russell 2000 Value -1.55%
Lehmen High Yield 25.64%	Russell 2000 Value 7.41%	Russell 2000 Value -7.11%	S&P Growth 11.95%	Citigroup World Govt Bond 4.35%	Russell 2000 Value -21.77%	Lehman Aggregate 16.00%	Citigroup World Govt Bond 5.56%	S&P 500 10.08%	Russell 2000 -1.82%
Lehman Aggregate 22.10%	Russell 2000 5.68%	Russell 2000 -8.77%	Lehman Aggregate 7.89%	Wilshire REIT 2.72%	MSCI EAFE -23.20%	Citigroup World Govt Bond -15.82%	S&P Growth 5.07%	Lehman Aggregate 9.75%	Russell 2000 Growth -2.43%
Wilshire REIT 6.50%	Russell 2000 Growth 3.58%	Russell 2000 Growth -10.48%	Citigroup World Govt Bond 4.42%	Lehman High Yield 0.33%	Wilshire REIT -23.44%	MSCI EAFE 12.50%	MSCI EAFE -11.85%	S&P Growth 1.68%	Lehman Aggregate -2.92%



### Ten Year: Periodic Table of Investment Returns

1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
S&P	Wilshire	.S&P	S&P	Russell	Wilshire	Russell	Citigroup World	Russell	Wilshire
Growth	REIT	Growth	Growth	. 2000 Growth	REIT	2000 Value	Govt Bond	2000 Growth	REIT
38.13%	37.04%	36.53%	42.16%	43.09%	31.04%	14.02%	19.51%	48.54%	33.14%
S&P 500 37.58%	S&P Growth 23.97%	S&P 500 33.36%	S&P 500 28.58%	S&P Growth 28.25%	Russell 2000 Value 22.83%	Wilshire REIT 12.35%	Lehman Aggregate 10.25%	Russell 2000 47.25%	Russell 2000 Value 22.25%
<b>SSP</b> Value 36.99%	S&P 500 22.96%	Russell 2000 Value 31.78%	MSCI EAFE 20.33%	MSCI EAFE 27.20%	Lehman Aggregate 11.63%	Lehmen Aggregate 8.44%	Wilshire REIT 3.60%	Russell 2000 Value 46.03%	MSCI EAIFE 20.70%
Russell	S&P	<b>SGP</b>	Citigroup World	Russell	<b>S&amp;P</b>	Lehmen	Lehman	MSCI	Russell
2000 Growth	Value	Value	Govt Bond	2000	Value	High Yield	High Yield	EAFE	2000
31.04%	21.99%	29.98%	15.30%	21.26%	6.08%	5.28%	-1.41%	39.17%	18.33%
Russell 2000 28.44%	Russell 2000 Value <sub>.</sub> 21.37%	Russell 2000 22.36%	<b>S&amp;P</b> <b>Value</b> 14.67%	S&P 500 21.04%	Citigroup World Govt Bond 1.61%	Russell 2000 2.49%	Russell 2000 Value -11.42%	Wilshire REIT 36.18%	S&P Value 15.71%
Russell	Russell	Wilshire	Lehman	<b>S&amp;P</b>	Russell	Citigroup World	MSCI	<b>S&amp;P</b>	Russell
2000 Value	2000	REIT	Aggregate	<b>Value</b>	2000	Govt Bond	EAFE	<b>Value</b>	2000 Growth
25.75%	16.49%	19.53%	8.69%	12.72%	-3.02%	-0.95%	-15.66%	31.79%	14.31%
Lehman	Lehmen	Russell	Lehmen	Lehmen	Lehman	. Russell	Russell	Lehmen	Lehman
High Yield	High Yield	2000 Growth	High Yield	High Yield	High Yield	2000 Growth	2000	High Yield	High Yield
19.17%	11.35%	12.95%	1.87%	2.39%	-5.86%	-9.23%	-20.48%	23.97%	11.13%
Citigroup World Govt Bond 19.04%	Russell 2000 Growth 11.26%	Lehmen High Yield 12.76%	Russell 2000 Growth 1.23%	Lehman Aggregate -0.82%	S&P 500 -9.11%	<b>S&amp;P</b> <b>Value</b> -11.71%	<b>S&amp;P</b> Value -20.85%	S&P 500 28.68%	S&P 500 10.88%
Lehman Aggregate 18.47%	MSCI EAFE 6.36%	Lehman Aggregate 9.65%	Russell / 2000 -2.55%	Russell 2000 Value -1.49%	MSCI EAFE -14.02%	S&P 500 -11.88%	S&P 500 -22.10%	S&P Growth 25.66%	Citigroup World Govt Bond 10.35%
Wilshire	Citigroup World	MSCI	Russell	Wilshire	S&P	S&P	S&P	Citigroup World	S&P
REIT	Govt Bond	EAFE	2000 Value	REIT	Growth	Growth	Growth	Govt Bond	Growth
12.24%	3.65%	2.06%	-6.45%	-1.83%	-22.08%	-12.73%	-23.59%	14.92%	6.13%
MSCI	Lehman	Citigroup World	Wilshire	Citigroup World	Russell	MSCI	Russell	Lehman	Lehman
EAFE	Aggregate	Govt Bond	REIT	Govt Bond	2000 Growth	EAFE	2000 Growth	Aggregate	Aggregate
11.55%	3.63%	0.28%	-17.00%	-4.22%	-22.43%	-21.21%	-30.26%	4.10%	4.34%





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### **Agenda**

Item No. <u>48</u>

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. ADM 110.7 (PC 30100)

March 24, 2005

SUBJECT:

MTS: OPERATIONS BUDGET STATUS REPORT FOR JANUARY FY 05

#### RECOMMENDATION:

That the Board of Directors receive the Metropolitan Transit System (MTS) Operations Budget Status Report for January FY 05.

**Budget Impact** 

None at this time.

#### DISCUSSION:

This report compares operating expenditures compared to budget for January 2005. (Attachment A-1 is a summary).

#### MTS OPERATIONS

Attachment A-2 summarizes combined operations. Attachment A-3 provides greater detail on combined operations. Attachments A-4 to A-17 present budget comparisons for each MTS operation.



#### Revenues

Fare Revenue – January 2005. Combined fare revenue for January 2005 aggregated \$5,595,000 compared to the amended budget of \$5,593,000, which represents a \$2,000 (0.0%) favorable variance. Fare revenues for rail operations resulted in a \$69,000 (3.4%) positive revenue variance. Fare revenues associated with internal bus operations were \$1,837,000 compared to \$1,845,000, resulting in an \$8,000 (-0.4%) unfavorable budget. Other operations (Chula Vista Transit and National City Transit) and Contract Services operations fare revenue was \$59,000 (-3.4%) under budget.

Total passengers for January 2005 were 6,122,000 compared to a budget of 6,359,000, representing an unfavorable ridership variance of 237,000. Rail operations had 8,000 (0.3%) more passengers than budget while all other bus-related operations were 245,000 (-6.2%) passengers less than the January 2005 budget.

<u>Fare Revenue – Year-to-Date January 2005</u>. Combined fare revenue for January 2005 year-to-date was \$41,351,000 compared to the year-to-date budget of \$41,363,000, representing a \$12,000 (0.0%) unfavorable year-to-date variance. Rail operations contributed a \$69,000 (0.4%) year-to-date positive variance, while all year-to-date bus-related operations were \$81,000 (-0.7%) under budget.

Total passengers for the first seven months of the 2005 fiscal year totaled 44,850,000 for all MTS operations compared to year-to-date budgeted ridership totaling 45,105,000, representing a 255,000 unfavorable variance in ridership. Rail operations contributed an 8,000 (0.0%) positive ridership variance while other bus-related operations were 261,000 (-0.9%) passengers less than the January 2005 year-to-date budget.

Other Revenue. Other revenue totaled \$60,000 compared to a January 2005 budget of \$123,000. Year-to-date other revenues through January 2005 were \$625,000 compared to the year-to-date budget of \$689,000, representing a \$64,000 unfavorable variance. This represents less-than-anticipated advertising demand within internal bus operations and rail operations.

<u>Subsidy</u>. Combined subsidy for January 2005 was \$11,509,000 compared to a \$10,073,000 budget. This represents a \$1,436,000 or 14.3% positive variance. This positive variance is primarily due to rail operations receipt of advanced Transportation Development Act (TDA) funds in the current month. Year-to-date subsidy through January 2005 was \$66,519,000 compared to a year-to-date subsidy budget of \$64,527,000. This \$1,991,000 positive variance is primarily due to TDA subsidy advances early within the fiscal year.

#### Expenses

<u>Personnel Costs</u>. Total personnel-related costs for January 2005 were \$7,700,000 compared to the budget at \$7,860,000, resulting in a \$160,000 (2.0%) favorable variance. Year-to-date employee-related costs totaled \$50,041,000 compared to a year-to-date budgetary figure of \$50,126,000. Year-to-date personnel costs were under budget by \$85,000 (0.2%).

Outside Services and Purchased Transportation – January 2005. Total outside services expenses totaled \$5,144,000 compared to a budgetary figure of \$5,060,000, resulting in an unfavorable expense variance of \$83,000 (-1.6%). This unfavorable variance is primarily driven by higher facility repair and bus-cleaning service costs within internal bus and rail operations (\$75,000).

Outside Services and Purchased Transportation – Year-to-Date January 2005. Total outside services for the first seven months of the fiscal year totaled \$36,115,000 compared to \$36,132,000, resulting in a year-to-date positive variance of \$17,000 (0.0%).

<u>Materials and Supplies</u>. Total combined materials and supplies costs were \$641,000 for January 2005 compared to the amended budget of \$720,000, resulting in a favorable expense variance of \$79,000 (11.0%). Rail operations material uses trended down significantly within the month (\$163,000 under budget). The positive variance is offset by high material use within internal bus operations (\$63,000 over budget). Year-to-date materials and supplies expenses totaled \$5,146,000 compared to a budgetary figure of \$5,205,000, resulting in a positive expense variance of \$58,000 (1.1%).

<u>Energy – January 2005</u>. Total energy costs were \$1,679,000 for the month compared to the budget of \$1,644,000. This unfavorable variance of \$36,000 (-2.2%) is primarily the result of higher-than-expected electricity usage within rail operations. As the midyear amended budget revised the diesel and compressed natural gas (CNG) prices to \$1.60 per gallon and \$1.05 per therm, respectively, there were no significant variances within those areas.

Energy – Year-to-Date January 2005. Total year-to-date energy costs were \$11,784,000 compared to the budget of \$11,813,000, resulting in a year-to-date positive variance of \$29,000 (0.2%). Year-to-date diesel fuel expenses were under budget by \$56,000 (1.5%), offset by electricity-related expenses over budget by \$33,000 (-0.9%).

<u>Risk Management</u>. Risk management costs were \$508,000 for January 2005 compared to a \$427,000 budgetary figure, resulting in an unfavorable variance of \$80,000 (-18.8%). This unfavorable variance is primarily due to higher workers' compensation legal fees within internal bus operations (\$49,000 over budget). Year-to-date expenses for risk management were \$114,000 (-3.9%).

General and Administrative. General and administrative costs were \$49,000 for the month compared to the amended budget of \$76,000, resulting in a favorable expense variance of \$27,000 (35.3%). Year-to-date general and administrative costs were \$3,000 (1.0%) under budget totaling \$320,000 through January 2005 compared to a year-to-date budget of \$323,000.

<u>Month-End Summary</u>. After midyear budget adjustments, the total favorable net operating subsidy variance of \$11,000 for the month of January 2005 was produced by various factors. Total personnel and materials-related expenses produced a combined positive variance of \$240,000 offset by higher-than-anticipated costs (\$164,000) within outside services and risk management.

<u>Year-to-Date Summary</u>. After midyear budget adjustments, the year-to-date operating subsidy netted a positive variance of \$3,000 (0.0%).

#### Other Expenditures

Attachment A-1 summarizes total nonoperating other expenditures.

The January 2005 combined favorable variance for other expenditures totaled \$137,000. Total year-to-date expenses totaled \$4,173,000 compared to a year-to-date amended budget of \$4,520,000, resulting in a positive variance of \$346,000 (7.7%) through January 2005.

Paul C. Jablonski Chief Executive Officer

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Attachment: A. Combined Operations

#### **COMBINED OPERATIONS** TRANSIT OPERATORS NET SUBSIDY AND OTHER EXPENDITURES

#### **COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005** (in \$000's)

		- MON	îH	
		AMENDED		%
	ACTUAL	BUDGET	VARIANCE	VARIANCE
MTS Net Operating Subsidy				
Internal Bus Operations	5,069	4,965	(103)	-2.1%
Rail Operations	1,560	1,703	143	8.4%
Contracted Bus Operations - Fixed Route	2,237	2,165	(72)	-3.3%
Contracted Bus Operations - Para Transit	706	748	42	5.6%
Other Operators	490	492	3	0.6%
Total MTS Net Operating Subsidy	10,062	10,073	11	0.1%
Other Expenditures				
Administrative Pass Thru	0	0	0	-
Taxicab Administration	(527)	(542)	(15)	2.8%
San Diego and Arizona Eastern	10	12	2	14.7%
Debt Service	0	0	0	-
General Fund	250_	401	150_	37.5%
Grand Total Expenditures	9,796	9,944	148	1.5%

	ter i Kilpet	YEAR TO	DATE	
		AMENDED		%
	ACTUAL	BUDGET	VARIANCE	VARIANCE
MTS Net Operating Subsidy				
Internal Bus Operations	30,827	30,691	(135)	-0.4%
Rail Operations	10,412	10,560	148	1.4%
Contracted Bus Operations - Fixed Route	14,766	14,684	(82)	-0.6%
Contracted Bus Operations - Para Transit	5,418	5,471	54	1.0%
Other Operators	3,101	3,120	19_	0.6%
Total MTS Net Operating Subsidy	64,524	64,527	3	0.0%
Other Expenditures				
Administrative Pass Thru	344	344	0	0.0%
Taxicab Administration	(125)	(43)	82	-192.9%
San Diego and Arizona Eastern	110	119	9	7.3%
Debt Service	-	0	0	-
General Fund	3,844	4,100	255_	6.2%
Grand Total Expenditures	68,697	69,047	349	0.5%

#### **COMBINED OPERATIONS**

#### COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005 (in \$000's)

4.0001111		MON	ITH		
ACTUAL		MENDED BUDGET	VA	RIANCE	% VARIANCE
Fare Revenue \$ 5,5	95 \$	5,593	\$	2	0.0%
Other Revenue	<u> </u>	123		(63)	-51.2%
Total Operating Revenue \$ 5,6	55 \$	5,716	\$	(61)	-1.1%
Subsidy11,50	<u> </u>	10,073		1,436	14.3%
Total Revenue \$ 17,10	64 \$	15,789	\$	1,375	8.7%
Wages \$ 4,8	36 \$	4,850	\$	15	0.3%
Fringes 2,8	34	3,010		145	4.8%
Services 1,0	26	938		(89)	-9.5%
Purchased Transportation 4,1	18	4,123		` 6´	0.1%
Materials 6	41	720		79	11.0%
Energy 1,6	79	1,644		(36)	-2.2%
	28	428		(80)	-18.7%
	49	77		27	35.1%
Vehicle/Facility Lease	(5)			5	100.0%
Total Costs \$ 15,7	17\$	15,789	\$	73	0.5%
Total Revenue Less Total Costs \$ 1,4	48 _\$	-	\$	1,448	100.0%
Net Operating Subsidy \$ (10,0)	<u> </u>	(10,073)	\$	11	0.1%
		YEAR TO	DATE		
	A	YEAR TO	DATE		%
ACTUAL				RIANCE	% VARIANCE
ACTUAL Fare Revenue \$ 41,3	. 1	MENDED			• -
ACTUAL Fare Revenue \$ 41,3	. 1	MENDED BUDGET	VA	RIANCE	VARIANCE
ACTUAL Fare Revenue \$ 41,3	51 \$ 25	MENDED BUDGET 41,363	VA	(12) (64)	0.0% -9.3%
Fare Revenue \$ 41,33 Other Revenue 6	51 \$ 25	MENDED BUDGET 41,363 689	<b>VA</b> \$	RIANCE (12)	VARIANCE 0.0%
Fare Revenue \$ 41,33 Other Revenue 65  Total Operating Revenue \$ 41,93	51 \$ 25 76 \$ 19	MENDED BUDGET 41,363 689 42,052	<b>VA</b> \$	(12) (64) (76)	0.0% -9.3% -0.2%
Fare Revenue         \$ 41,33           Other Revenue         65           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,43	51 \$ 25 76 \$ 19 95 \$	41,363 689 42,052 64,527	\$ \$ \$	(12) (64) (76) 1,991	0.0% -9.3% -0.2% 3.1% 1.8%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         65           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,49           Wages         \$ 32,63           Fringes         17,33	551 \$ 225 76 \$ 19 95 \$ \$	41,363 689 42,052 64,527 106,579	<b>VA</b> \$ \$	(12) (64) (76) 1,991 <b>1,916</b> (158)	0.0% -9.3% -0.2% 3.1% -1.8%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         65           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,43           Wages         \$ 32,63           Fringes         17,33           Services         7,56	51 \$ 225 76 \$ 19 \$ 57 \$ 34	41,363 689 42,052 64,527 106,579 32,499 17,627	\$ \$ \$	(12) (64) (76) 1,991 <b>1,916</b> (158) 243	0.0% -9.3% -0.2% 3.1% -0.5% 1.4%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         65           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,43           Wages         \$ 32,63           Fringes         17,33	51 \$ 225 76 \$ 19 \$ 57 \$ 34 443	41,363 689 42,052 64,527 106,579 32,499 17,627 7,545	\$ \$ \$	(12) (64) (76) 1,991 <b>1,916</b> (158)	0.0% -9.3% -0.2% 3.1% -0.5% 1.4% 0.0%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         65           Total Operating Revenue         \$ 41,93           Subsidy         66,5           Total Revenue         \$ 108,43           Wages         \$ 32,63           Fringes         17,33           Services         7,54           Purchased Transportation         28,55           Materials         5,14	51 \$ 225 76 \$ 19 95 \$ 57 \$ 34 43 72	41,363 689 42,052 64,527 106,579 32,499 17,627	\$ \$ \$	(12) (64) (76) 1,991 1,916 (158) 243 2	0.0% -9.3% -0.2% 3.1% -0.5% 1.4%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         65           Total Operating Revenue         \$ 41,93           Subsidy         66,5           Total Revenue         \$ 108,43           Wages         \$ 32,63           Fringes         17,33           Services         7,54           Purchased Transportation         28,5           Materials         5,14           Energy         11,76	51 \$ 25 76 \$ 19 95 \$ \$ 34 43 72 46 34	41,363 689 42,052 64,527 106,579 32,499 17,627 7,545 28,587	\$ \$ \$	(12) (64) (76) 1,991 <b>1,916</b> (158) 243 2 15	0.0% -9.3% -0.2% 3.1% -0.5% 1.4% 0.0% 0.1%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         66           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,43           Wages         \$ 32,63           Fringes         17,33           Services         7,50           Purchased Transportation         28,5           Materials         5,14           Energy         11,78           Risk Management         3,04	51 \$ 25 76 \$ 19 95 \$ \$ 43 72 46 34 41	41,363 689 42,052 64,527 106,579 32,499 17,627 7,545 28,587 5,205 11,813 2,927	\$ \$ \$	(12) (64) (76) 1,991 1,916 (158) 243 2 15 58	0.0% -9.3% -0.2% 3.1% -0.5% 1.4% 0.0% 0.1% 1.1%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         66           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,49           Wages         \$ 32,69           Fringes         17,30           Services         7,50           Purchased Transportation         28,50           Materials         5,14           Energy         11,70           Risk Management         3,00           General and Administrative         32	51 \$ 25	41,363 689 42,052 64,527 106,579 32,499 17,627 7,545 28,587 5,205 11,813 2,927 323	\$ \$ \$	(12) (64) (76) 1,991 <b>1,916</b> (158) 243 2 15 58 29	0.0% -9.3% -0.2% 3.1% -0.5% 1.4% 0.0% 0.1% 1.1% 0.2%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         66           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,49           Wages         \$ 32,69           Fringes         17,30           Services         7,50           Purchased Transportation         28,50           Materials         5,14           Energy         11,70           Risk Management         3,00           General and Administrative         32	51 \$ 25 76 \$ 19 95 \$ \$ 43 72 46 34 41	41,363 689 42,052 64,527 106,579 32,499 17,627 7,545 28,587 5,205 11,813 2,927	\$ \$ \$	(12) (64) (76) 1,991 1,916 (158) 243 2 15 58 29 (114)	0.0% -9.3% -0.2% 3.1% 1.8% -0.5% 1.4% 0.0% 0.1% 1.1% 0.2% -3.9%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         66           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,49           Wages         \$ 32,69           Fringes         17,30           Services         7,50           Purchased Transportation         28,50           Materials         5,14           Energy         11,70           Risk Management         3,00           General and Administrative         32	51 \$ 25	41,363 689 42,052 64,527 106,579 32,499 17,627 7,545 28,587 5,205 11,813 2,927 323	\$ \$ \$	(12) (64) (76) 1,991 1,916 (158) 243 2 15 58 29 (114)	0.0% -9.3% -0.2% 3.1% -0.5% 1.4% 0.0% 0.1% 1.1% 0.2% -3.9% 0.9%
ACTUAL           Fare Revenue         \$ 41,33           Other Revenue         66           Total Operating Revenue         \$ 41,9           Subsidy         66,5           Total Revenue         \$ 108,49           Wages         \$ 32,69           Fringes         17,33           Services         7,5-           Purchased Transportation         28,5-           Materials         5,1-           Energy         11,70           Risk Management         3,0-           General and Administrative         33           Vehicle/Facility Lease         9	551 \$ 225	41,363 689 42,052 64,527 106,579 32,499 17,627 7,545 28,587 5,205 11,813 2,927 323 53	\$ \$ \$ \$	(12) (64) (76) 1,991 1,916 (158) 243 2 15 58 29 (114) 3	0.0% -9.3% -0.2% 3.1% -0.5% 1.4% 0.0% 0.1% 1.1% 0.2% -3.9% 0.9% 0.0%

#### **COMBINED OPERATIONS**

#### FINANCIAL COMPARISON TO BUDGET SEVEN MONTHS ENDING JANUARY 31, 2005

		CUR	RENT MONTH	COMPARISO	N	YE	AR TO DATE C	FULL YEAR				
FY Month:	7	ACTUAL	AMENDED BUDGET	VARIANCE	% VAR	ACTUAL	AMENDED BUDGET	VARIANCE	% VAR	AMENDED BUDGET	REMAINING	
REVENUE							• 44 000 D75	<b>\$</b> (11,579)	0.0%	\$ 68,912,400	\$ 27,561,004	
	Passenger Fares	\$ 5,595,490 25,463	\$ 5,593,398 62,100	\$ 2,092 (36,638)	0.0% -59.0%	\$ 41,351,396 396,064	\$ 41,362,975 432,701	\$ (11,579) (36,637)	-8.5%	740,000	343,936	
	Advertising Contracted Service Revenue	25,465	2,000	(2,000)	-00.070	· -	14,000	(14,000)	•	25,000	25,000	
	Other	34,143	58,798	(24,654)	<u>-41.9%</u>	228,860	242,281	(13,420)	<u>-5.5%</u>	411,269	182,409	
	Total Operating Revenue	\$ 5,655,096	\$ 5,716,295	\$ (61,200)	-1.1%	\$ 41,976,321	\$ 42,051,957	\$ (75,637)	-0.2%	\$ 70,088,669	\$ 28,112,348	
	Subsidy	11,509,175	10,072,932	1,436,244	14.3%	66,518,616	64,527,203	1,991,413	3.1%	114,294,729	47,776,114	
	Total Revenue	\$ 17,164,271	\$ 15,789,227	\$ 1,375,044	8.7%	\$ 108,494,936	\$ 106,579,160	\$ 1,915,776	1.8%	\$ 184,383,398	\$ 75,888,462	
EXPENSES												
	Personnel	\$ 4,835,739	\$ 4,850,487	\$ 14,748	0.3%	\$ 32,657,229	\$ 32,499,094	\$ (158,135)	-0.5%	\$ 56,341,293	\$ 23,684,064	
	Wages Fringes	\$ 4,835,739 2,864,244	3,009,715	145,471	4.8%	17,383,876	17,627,082	243,205	1.4%	30,048,924	12,665,048	
	Total Personnel	\$ 7,699,983	\$ 7,860,202	\$ 160,218	2.0%	\$ 50,041,105	\$ 50,126,176	\$ 85,071	0.2%	\$ 86,390,217	\$ 36,349,112	
	Outside Services											
	Security	\$ 416,381	\$ 357,747	\$ (58,634)	-16.4%	\$ 3,162,881	\$ 3,162,869	\$ (12)	0.0%	\$ 5,322,613	\$ 2,159,732	
	Repair/Maintenance Services	336,976	262,298	(74,678)	-28.5%	2,090,459	2,026,652	(63,807) (119)	-3.1% 0.0%	3,335,511 1,012,003	1,245,052 600,165	
	Engine and Transmission Rebuild	84,477	97,817	13,340 31,101	13.6% 14.2%	411,838 1,877,752	411,719 1,943,802	66,050	3.4%	3,903,113	2,025,361	
	Other Outside Services Purchased Transportation	188,152 4,117,698	219,253 4,123,427	5,729	0.1%	28,572,165	28,586,989	14,824	0.1%	49,557,717	20,985,552	
	Other Contracted Bus Services	4,117,030	-,120,427						-		-	
	Total Outside Services	\$ 5,143,683	\$ 5,060,542	\$ (83,141)	-1.6%	\$ 36,115,095	\$ 36,132,031	\$ 16,936	0.0%	\$ 63,130,957	\$ 27,015,861	
	Materials & Supplies											
	Lubricants	\$ 49,641	\$ 16,958	\$ (32,683)	-192.7%	\$ 118,837	\$ 82,596	\$ (36,241)	-43.9%	\$ 165,772 614,407	\$ 46,935 269,452	
	Tires	44,614	55,034	10,420 101,698	18.9% 15.7%	344,955 4,682,640	362,238 4,759,746	17,283 77,106	4.8% 1.6%	7,530,370	2,847,729	
	Other Materials and Supplies	546,802	648,499	101,090		4,002,040	4,700,740					
	Total Main. Parts and Supplies	\$ 641,056	\$ 720,491	\$ 79,435	11.0%	\$ 5,146,432	\$ 5,204,580	\$ 58,148	1.1%	\$ 8,310,549	\$ 3,164,116	
	Energy	\$ 501.045	\$ 510,383	\$ 9,338	1.8%	\$ 3,757,671	\$ 3,814,034	\$ 56,363	1.5%	\$ 6,488,321	\$ 2,730,650	
	Dieset Fuel CNG	\$ 501,045 596,246	\$ 510,383 603,250	7,004	1.2%	4,165,514	4,171,618	6,104	0.1%	7,090,261	2,924,747	
	Fuel and Electricity for Facilities	582,075	530,168	(51,907)	-9.8%	3,860,937	3,827,796	(33,140)	-0.9%	6,677,389	2,816,452	
	Total Energy	\$ 1,679,366	\$ 1,643,801	\$ (35,565)	-2.2%	\$ 11,784,121	\$ 11,813,448	\$ 29,327	0.2%	\$ 20,255,971	\$ 8,471,850	
	Risk Management	\$ 508,149	\$ 427,661	\$ (80,488)	-18.8%	\$ 3,041,468	\$ 2,927,065	\$ (114,404)	-3.9%	\$ 5,432,070	\$ 2,390,602	
	General and Administrative	\$ 49,486	\$ 76,530	\$ 27,044	35.3%	\$ 319,811	\$ 323,072	\$ 3,262	1.0%	\$ 671,434	\$ 351,624	
	Vehicle/facility Lease	\$ (5,000)	\$ -	\$ 5,000	-	\$ 52,788	\$ 52,788	\$ -	0.0%	<b>\$</b> 192,200	\$ 139,412	
	TOTAL EXPENSES	\$ 15,716,724	\$ 15,789,227	\$ 72,503	0.6%	\$ 106,500,821	\$ 106,679,160	\$ 78,340	0.1%	\$ 184,383,398	\$ 77,882,578	
>	Total Revenue Less Total Costs	\$ 1,447,547	<u> </u>	\$ 1,447,547		\$ 1,994,116	<u>\$</u> -	\$ 1,994,116	•	\$ (0)	\$ (1,994,116)	
ည်	NET OPERATING SUBSIDY	\$(10,061,628)	\$(10,072,932)	\$ 11,303	0.1%	\$ (64,524,500)	\$ (64,627,203)	\$ 2,703	0.0%	\$(114,294,729)	\$ (49,770,229)	

# INTERNAL BUS OPERATIONS (SAN DIEGO TRANSIT CORPORATION)

#### COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005 (in \$000's)

	MONTH											
	ACTUAL			MENDED			%					
	,	ACTUAL	E	BUDGET	VA	RIANCE	VARIANCE					
Fare Revenue	\$	1,837	\$	1,845	\$	(8)	-0.4%					
Other Revenue		44		72		(28)	38.9%					
Total Operating Revenue	\$	1,881	\$	1,917	\$	(36)	-1.9%					
Subsidy		4,264		4,965		(701)	-14.1%					
Total Revenue	\$	6,145	\$	6,882	\$	(736)	-10.7%					
Wages	\$	0.040	\$	0.707	•	(404)	4.404					
Fringes	Φ	2,849 2,459	Ф	2,727 2,584	\$	(121) 126	-4.4% 4.9%					
Services		298		300		2	0.7%					
Purchased Transportation		-		-		_	-					
Materials		423		371		(52)	-14.0%					
Energy		589		596		8	1.3%					
Risk Management		295		247		(49)	-19.8%					
General and Administrative		38		57		19	33.3%					
Vehicle/Facility Lease							-					
Total Costs	\$	6,950	\$	6,882	\$	(68)	-1.0%					
Total Revenue Less Total Costs		(804)	\$		\$	(804)	100.0%					
Net Operating Subsidy	\$	(5,069)	\$	(4,965)	\$	(103)	2.1%					
				YEAR TO	DATE	-						
			- vermonous	YEAR TO	DATE		%					
	<u> </u>	ACTUAL	Ai			RIANCE						
Fare Revenue		ACTUAL	Af B	MENDED SUDGET	VA	RIANCE	% VARIANCE					
Fare Revenue Other Revenue	\$		Ai	MENDED			%					
Other Revenue	\$	13,139 476	A1 B	13,138 505	<b>VA</b> \$	<b>RIANCE</b> 1 (28)	% VARIANCE 0.0% -5.5%					
Other Revenue  Total Operating Revenue		13,139 476 13,615	Af B	13,138 505 13,643	VA	1 (28) (27)	% VARIANCE 0.0% -5.5% -0.2%					
Other Revenue Total Operating Revenue Subsidy	\$	13,139 476	A1 B	13,138 505	<b>VA</b> \$	<b>RIANCE</b> 1 (28)	% VARIANCE 0.0% -5.5%					
Other Revenue  Total Operating Revenue	\$	13,139 476 13,615	A1 B	13,138 505 13,643	<b>VA</b> \$	1 (28) (27)	% VARIANCE 0.0% -5.5% -0.2%					
Other Revenue Total Operating Revenue Subsidy Total Revenue Wages	\$	13,139 476 13,615 28,436 42,051	\$ \$ \$	13,138 505 13,643 30,691 44,334	\$ \$ \$	(27) (2,255) (2,283)	% VARIANCE  0.0% -5.5% -0.2% -7.3% -5.1%					
Other Revenue Total Operating Revenue Subsidy Total Revenue Wages Fringes	\$ \$ \$	13,139 476 13,615 28,436	\$ \$ \$	13,138 505 13,643 30,691 44,334	\$ \$	1 (28) (27) (2,255) (2,283) (276)	% VARIANCE  0.0% -5.5% -0.2% -7.3%  -5.1%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services	\$ \$ \$	13,139 476 13,615 28,436 42,051	\$ \$ \$	13,138 505 13,643 30,691 44,334	\$ \$ \$	(27) (2,255) (2,283)	% VARIANCE  0.0% -5.5% -0.2% -7.3% -5.1%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation	\$ \$ \$	13,139 476 13,615 28,436 42,051 19,126 14,636 1,816	\$ \$ \$	13,138 505 13,643 30,691 44,334 18,850 14,883	\$ \$ \$	(27) (2,255) (2,283) (2,266) 247	% VARIANCE  0.0% -5.5%  -0.2% -7.3%  -5.1%  -1.5% 1.7%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials	\$ \$ \$	13,139 476 13,615 28,436 42,051 19,126 14,636 1,816 - 2,844	\$ \$ \$	13,138 505 13,643 30,691 44,334 18,850 14,883 1,827 - 2,776	\$ \$ \$	(27) (2,255) (2,283) (2,283) (2,283) (2,283) (2,283) (2,283) (2,283) (2,283)	% VARIANCE  0.0% -5.5%  -0.2% -7.3%  -5.1%  -1.5% 1.7% 0.6% -2.4%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy	\$ \$ \$	13,139 476 13,615 28,436 42,051 19,126 14,636 1,816 - 2,844 4,161	\$ \$ \$	13,138 505 13,643 30,691 44,334 18,850 14,883 1,827 - 2,776 4,217	\$ \$ \$	(27) (2,255) (2,283) (2,283) (2,283) (276) 247 11 - (68) 56	% VARIANCE  0.0% -5.5%  -0.2% -7.3%  -5.1%  -1.5% 1.7% 0.6%2.4% 1.3%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management	\$ \$ \$	13,139 476 13,615 28,436 42,051 19,126 14,636 1,816 - 2,844 4,161 1,664	\$ \$ \$	13,138 505 13,643 30,691 44,334 18,850 14,883 1,827 - 2,776 4,217 1,591	\$ \$ \$	(27) (2,255) (2,283) (2,283) (276) 247 11 - (68) 56 (74)	% VARIANCE  0.0% -5.5%  -0.2% -7.3%  -5.1%  -1.5% 1.7% 0.6%2.4% 1.3% -4.7%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy	\$ \$ \$	13,139 476 13,615 28,436 42,051 19,126 14,636 1,816 - 2,844 4,161	\$ \$ \$	13,138 505 13,643 30,691 44,334 18,850 14,883 1,827 - 2,776 4,217	\$ \$ \$	(27) (2,255) (2,283) (2,283) (2,283) (276) 247 11 - (68) 56	% VARIANCE  0.0% -5.5%  -0.2% -7.3%  -5.1%  -1.5% 1.7% 0.6%2.4% 1.3%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management General and Administrative	\$ \$ \$	13,139 476 13,615 28,436 42,051 19,126 14,636 1,816 - 2,844 4,161 1,664	\$ \$ \$	13,138 505 13,643 30,691 44,334 18,850 14,883 1,827 - 2,776 4,217 1,591 190	\$ \$ \$	(27) (2,255) (2,283) (2,283) (276) 247 11 - (68) 56 (74) (4)	% VARIANCE  0.0% -5.5%  -0.2% -7.3%  -5.1%  1.7% 0.6% -2.4% 1.3% -4.7% -2.1%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management General and Administrative Vehicle/Facility Lease	\$ \$ \$	13,139 476 13,615 28,436 42,051 19,126 14,636 1,816 - 2,844 4,161 1,664 194 -	\$ \$ \$ \$	13,138 505 13,643 30,691 44,334 18,850 14,883 1,827 - 2,776 4,217 1,591	\$ \$ \$	(27) (2,255) (2,283) (276) 247 11 - (68) 56 (74) (4) - (108)	% VARIANCE  0.0% -5.5%  -0.2% -7.3%  -5.1%  1.7% 0.6% -2.4% 1.3% -4.7% -2.1%					
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management General and Administrative Vehicle/Facility Lease  Total Costs	\$ \$ \$	13,139 476 13,615 28,436 42,051 19,126 14,636 1,816 - 2,844 4,161 1,664 194	\$ \$ \$ \$	13,138 505 13,643 30,691 44,334 18,850 14,883 1,827 - 2,776 4,217 1,591 190	\$ \$ \$	(27) (2,255) (2,283) (2,283) (276) 247 11 - (68) 56 (74) (4)	% VARIANCE  0.0% -5.5%  -0.2% -7.3%  -5.1%  1.7% 0.6% -2.4% 1.3% -4.7% -2.1%					

### INTERNAL BUS OPERATIONS (SAN DIEGO TRANSIT CORPORATION)

### FINANCIAL COMPARISON TO BUDGET SEVEN MONTHS ENDING JANUARY 31, 2005

			CUR	REN	TMONT	100	MPARISO	N	YEAR TO DATE COMPARISON								FULL YEAR				
FY Month:	<u> 77.3.</u>	ACTL	IAL		MENDED BUDGET	v	'ARIANCE	% VAR		ACTUAL		AMENDED BUDGET	,	/ARIANCE	% VAR		AMENDED BUDGET	F	REMAINING		
REVENUE	Passenger Fares Advertising Contracted Service Revenue Other		6,858 5,463 - 8,688	\$	1,845,000 62,100 2,000 7,500	\$	(8,142) (36,638) (2,000) 11,188	-0.4% -59.0% - 149.2%	\$	13,139,071 396,064 - 79,922	\$	13,138,346 432,701 14,000 57,500	\$	725 (36,637) (14,000) 22,422	0.0% -8.5% - 39.0%	\$	21,180,000 740,000 25,000 100,000	s	8,040,929 343,936 25,000 20,078		
	Total Operating Revenue Subsidy	\$ 1,88 4,26	1,008 4,409	\$	1,916,600 4,965,105	\$	(35,592) (700,696)	-1.9% -14.1%		13,615,056 28,435,984	\$	13,642,547 30,691,481	\$	(27,491) (2,255,497)	-0.2%	\$	22,045,000 53,430,998	\$	8,429,944 24,995,014		
	Total Revenue	\$ 6,14	5,417	\$	6,881,705	\$	(736,288)	-10.7%	\$	42,051,040	\$	44,334,028	\$	(2,282,988)	-5.1%	\$	75,475,998	\$	33,424,958		
EXPENSES																					
<u>Per</u>	<u>sonnel</u> Wages Fringes	\$ 2,84 2,45	3,521 3,570	\$	2,727,143 2,584,121	\$	(121,378) 125,551	-4.5% -4.9%		19,125,922 14,635,907	\$	18,850,082 14,882,898	\$	(275,840) 246,991	-1.5% 1.7%	<b>\$</b>	32,034,214 25,176,772	\$	12,908,292 10,540,865		
	Total Personnel	\$ 5,30	7,091	\$	5,311,264	\$	4,173	0.1%	\$	33,761,829	\$	33,732,980	\$	(28,849)	-0.1%	\$	57,210,986	\$	23,449,157		
<u>Out</u>	side Services Security Repair/Maintenance Services Engine and Transmission Rebuild Other Outside Services Purchased Transportation	7: 4-	1,453 3,818 4,887 7,497	\$	77,816 44,081 57,817 119,917	\$	(3,637) (29,738) 12,930 22,420	-4.7% -67.5% 22.4% 18.7% -	\$	546,997 384,685 218,352 666,071	\$	544,712 340,501 224,719 717,400	\$	(2,285) (44,185) 6,367 51,329	-0.4% -13.0% 2.8% 7.2% -	\$	715,892 554,345 513,800 1,316,977	\$	168,895 169,660 295,448 650,906		
	Other Contracted Bus Services  Total Outside Services	\$ 29	 7.655	s	299,631	s	1,976	0.7%		1,816,105	s	1,827,332	s	11,226	0.6%		3,101,014	s	1,284,909		
Mat	erials & Supplies  Lubricants Tires Other Materials and Supplies  Total Main. Parts and Supplies	\$ 9 38 375	9,514 3,000 5,331	\$ 	10,233 49,034 311,751 371,018	\$ 	719 11,034 (63,580) (51,827)	7.0% 22.5% -20.4%	\$	75,619 331,866 2,436,893 2,844,378	\$ \$	70,981 343,238 2,361,663 2,775,882	\$ 	(4,638) 11,372 (75,230) (68,496)	-6.5% 3.3% -3.2%	\$ 	120,530 588,407 3,971,966 4,680,903	\$ 	44,911 256,541 1,535,073		
Ene		Ψ -722	.,040	¥	37 1,010	Ψ	(31,021)	-14.070	Ψ	2,044,070	Ψ	2,773,002	Ψ	(00,430)	-2.570	Ψ	4,000,200	ű	1,030,323		
	Diesel Fuel CNG Fuel and Electricity for Facilities	294	,447 1,988 5,095	\$	254,384 298,250 43,700	\$	6,937 3,262 (2,395)	2.7% 1.1% 5.5%	\$	1,807,940 2,061,358 291,926	\$	1,846,328 2,064,618 305,898	\$ 	38,388 3,260 13,972	2.1% 0.2% 4.6%	\$	3,079,662 3,508,799 524,400	\$	1,271,722 1,447,441 232,474		
	Total Energy	\$ 588	3,530	\$	596,334	\$	7,804	1.3%	\$	4,161,224	\$	4,216,844	\$	55,620	1.3%	\$	7,112,861	\$	2,951,637		
Risk	( Management	\$ 295	,229	\$	246,566	\$	(48,663)	-19.7%	\$	1,664,474	\$	1,590,964	\$	(73,510)	-4.6%	\$	2,958,798	\$	1,294,324		
<u>Gen</u>	eral and Administrative	\$ 38	,233	\$	56,894	\$	18,660	32.8%	\$	193,901	\$	190,028	\$	(3,874)	-2.0%	\$	411,436	\$	217,535		
	icle/facility Lease	\$	-	\$	-	\$	-	-	\$		\$	-	\$	- (407.000)	-	\$	-	\$	-		
	OTAL EXPENSES otal Revenue Less Total Costs	\$ 6,945 \$ (804	,165)	<u>\$</u> \$	6,881,705	<u>\$</u> \$	(67,877)	-1.0%		(2,390,871)	<u>\$</u>	44,334,028	<u>\$</u> \$	(2,390,871)	-0.2%	*	75,476,998	_ <del>5</del> \$	2,390,871		
''	NET OPERATING SUBSIDY	\$ (5,068			4,965,105)	\$	(103,469)	-2.1%		30,826,855)	\$ (	(30,691,481)	<u>;</u>	(135,374)	-0.4%	<u>*</u> \$	(53,430,998)		(22,604,143)		

# RAIL OPERATIONS CONSOLIDATED (SAN DIEGO TROLLEY INCORPORATED)

#### COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005 (in \$000's)

				ENDED			%		
	A	CTUAL	ВІ	JDGET	VAF	RIANCE	VARIANCE		
Fare Revenue	\$	2,103	\$	2,034	\$	69	3.4%		
Other Revenue		16		51		(36)	-70.6%		
Total Operating Revenue	\$	2,119	\$	2,085	\$	33	1.6%		
Subsidy		3,808		1,703		2,105	123.6%		
Total Revenue	\$	5,927		3,788	\$	2,138	56.4%		
Wages	\$	1,786	\$	1,913	\$	128	6.7%		
Fringes		382		404		21	5.2%		
Services		569		470		(99)	-21.1%		
Purchased Transportation		-		-		-	-		
Materials		202		332		131	39.5%		
Energy		547		499		(48)	-9.6%		
Risk Management		183		153		(31)	-20.3%		
General and Administrative Vehicle/Facility Lease		9		16 -		-	43.8%		
Total Costs	\$	3,679	\$	3,788	\$	110	2.9%		
Total Revenue Less Total Costs	\$	2,248	\$		\$	2,248	100.0%		
Net Operating Subsidy	\$	(1,560)	\$	(1,703)	\$	143	-8.4%		
				YEAR TO					
			AN	IENDED			%		
	Α	CTUAL	В	UDGET	VAI	RIANCE	VARIANCE		
Fare Revenue	\$	15,953	\$	15,884	\$	69	0.4%		
Other Revenue		149		185		(36)	-19.5%		
Total Operating Revenue	\$	16,102	\$	16,069	\$	33	0.2%		
Subsidy		14,794		10,560		4,234	40.1%		
Total Revenue	\$	30,896	\$	26,629	\$	4,267	16.0%		
Wages	\$	12,110	\$	12,217	\$	107	0.9%		
Fringes		2,605	•	2,593		(13)	-0.5%		
Services		4,654		4,630		(24)	-0.5%		
Purchased Transportation		-		-		· ·	-		
Materials		2,220		2,332		113	4.8%		
Energy		3,664		3,619		(46)	-1.3%		
Risk Management		1,169		1,138		(31)	-2.7%		
General and Administrative		93		101		8	7.9%		
Vehicle/Facility Lease		-		<del>-</del>			_		
Total Costs	_\$	26,515	\$	26,629	\$	114	0.4%		
Total Revenue Less Total Costs	\$	4,381	\$	-	\$	4,381	100.0%		
			<u> </u>						

### RAIL OPERATIONS CONSOLIDATED (SAN DIEGO TROLLEY INCORPORATED)

### FINANCIAL COMPARISON TO BUDGET SEVEN MONTHS ENDING JANUARY 31, 2005

		Cl		YE	AR 1	O DATE O	FULL YEAR										
FY Month:		ACTUAL		ENDED IDGET	VARIANCE	% VAR		ACTUAL		MENDED BUDGET	,	/ARIANCE	% VAR		AMENDED BUDGET	F	REMAINING
REVENUE	Passenger Fares Advertising	\$ 2,103,1	16 \$ 2,	,033,898	\$ 69,248	3.4%	\$	15,953,378	\$	15,884,129	\$	69,249	0.4%	\$	27,271,900	\$	11,318,522
	Contracted Service Revenue Other	15,4	6	- 51,298	(35,842)	-69.9%		148,939		184,781		(35,842)	19.4%	_	311,269		162,330
	Total Operating Revenue Subsidy	\$ 2,118,6 3,807,9		,085,195 ,703,068	\$ 33,406 2,104,925	1.6% 123.6%	\$	16,102,317 14,793,686	<b>\$</b>	16,068,910 10,560,133	\$	33,407 4,233,552	0.2% 40.1%	<b>\$</b>	27,583,169 18,701,322	\$	11,480,852 3,907,637
	Total Revenue	\$ 6,926,6	5 \$ 3,	,788,264	\$ 2,138,331	56.4%	\$	30,896,002	\$	26,629,044	\$	4,266,959	16.0%	\$	46,284,491	\$	15,388,489
EXPENSES																	
	<u>Personnel</u> Wages Fringes	\$ 1,785,6 382,4		,913,368 403,927	\$ 127,686 21,448	6.7% 5.3%	\$	12,109,926 2,605,493	\$	12,217,180 2,592,517	\$	107,253 (12,976)	0.9% 0.5%	\$	21,777,490 4,612,152	\$	9,667,563 2,006,659
	Total Personnel	\$ 2,168,10	1 \$ 2,	317,295	\$ 149,134	6.4%	\$	14,715,420	\$	14,809,697	\$	94,277	0.6%	\$	26,389,642	\$	11,674,222
	Outside Services Security Repair/Maintenance Services Engine and Transmission Rebuild	\$ 335,7° 253,3°		279,320 205,817 -	\$ (56,455) (47,520)	-20.2% -23.1%	\$	2,597,818 1,622,310	\$	2,601,313 1,589,651	\$	3,494 (32,658)	0.1% -2.1% -	\$	4,551,721 2,603,674	\$	1,953,903 981,364 -
	Other Outside Services Purchased Transportation Other Contracted Bus Services	(20,00 - -	9)	(14,664) - -	5,405 - -	-36.9% - -		433,646		439,102 - -		5,456 - -	1.2% - -		794,322 - -	************	360,676 - -
	Total Outside Services	\$ 569,04	4 \$	470,473	\$ (98,571)	-21.0%	\$	4,653,774	\$	4,630,066	\$	(23,708)	-0.5%	\$	7,949,717	\$	3,295,942
	Materials & Supplies Lubricants Tires Other Materials and Supplies	\$ 38,74 - 162,9		6,058 - 326,332	\$ (32,682) - 163,414	-539.5% - 50.1%	\$	39,630 - 2,179,960	\$	6,948 - 2,325,167	\$	(32,682) - 145,207	-470.4% - 6.2%	\$	37,242 - 3,433,404	\$	(2,388) - 1,253,444
	Total Main. Parts and Supplies	\$ 201,68			\$ 130,732	39.3%	\$	2,219,590	\$	2,332,115	\$	112,525	4.8%	\$	3,470,646	\$	1,251,056
	Energy Diesel Fuel	\$ 23,40	5 \$	24,999	\$ 1,594	6.4%	\$	175,126	\$	179,287	\$	4,161	2.3%	\$	311,074	\$	135,948
	CNG Fuel and Electricity for Facilities	523,84	9	474,101	(49,748)	10.5%		3,489,279	_	3,439,532		(49,748)	1.4%		6,005,072		2,515,793
	Total Energy	\$ 547,25	4 \$	499,101	\$ (48,154)	-9.6%	\$	3,664,406	\$	3,618,819	\$	(45,587)	-1.3%	\$	6,316,146	\$	2,651,740
	Risk Management	\$ 183,49	8 \$	152,762	\$ (30,736)	-20.1%	\$	1,168,503	\$	1,137,768	\$	(30,736)	-2.7%	\$	1,976,572	\$	808,069
	General and Administrative	\$ 9,00	7 \$	16,243	\$ 7,236	44.5%	\$	93,062	\$	100,579	\$	7,517	7.5%	\$	181,768	\$	88,706
	Vehicle/facility Lease	\$ -	\$		\$ -	-	\$		\$	-	\$	-	-	\$	-	\$	
	TOTAL EXPENSES	\$ 3,678,62			\$ 109,641	2.9%		26,614,765		26,629,044	<u>\$</u> \$	4,381,247	0.4%		46,284,491		19,769,736
	Total Revenue Less Total Costs	\$ 2,247,97		-	\$ 2,247,972	0.40/	<u> </u>	4,381,247	\$	(40 500 422)		147,695	1.4%	<u> </u>	(18,701,322)		(8,288,884)
	NET OPERATING SUBSIDY	\$ (1,560,02	1) \$ (1,	703,068)	\$ 143,047	8.4%		(10,412,439)	-	(10,560,133)	\$	141,635	1.4%	-	(10,701,322)	<u> </u>	(0,200,004)

#### **CONTRACT SERVICES - FIXED ROUTE**

#### **COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005** (in \$000's)

MONTH AMENDED

	A	CTUAL		BUDGET	VAF	RIANCE	% VARIANCE
Fare Revenue Other Revenue	\$	1,230	\$	1,318 -	\$	(88)	-6.7% 
Total Operating Revenue Subsidy	\$	1,230 2,213	\$	1,318 2,165	\$	(88) 48	-6.7% 2.2%
Total Revenue	\$	3,443	\$	3,483	\$	(40)	-1.1%
Wages Fringes	\$	29	\$	30	\$	1	3.3%
Services		72		76		4	5.3%
Purchased Transportation		2,987		2,990		3	0.1%
Materials		_,		_,		-	-
Energy		384		386		2	0.5%
Risk Management		-		~		-	-
General and Administrative		1		1			0.0%
Vehicle/Facility Lease		(5)		<del>-</del>		5_	100.0%
Total Costs		3,467	\$	3,483	\$	16	0.5%
Total Revenue Less Total Costs	\$	(25)		•	\$	(25)	100.0%
Net Operating Subsidy		(2,237)	\$	(2,165)	\$	(72)	-3.3%
			***********	YEAR TO	DATE		
		CTUAL		MENDED			%
	A	CTUAL	В	SUDGET	VAF	RIANCE	VARIANCE
Fare Revenue Other Revenue	\$	9,238 <u>-</u>	\$	9,340 <u>-</u>	\$	(102)	-1.1% 
Total Operating Revenue	\$	9,238	\$	9,340	\$	(102)	4 40/
Subsidy	•	14,742	Ψ	14,684	Ψ	58	-1.1% 0.4%
•				1 1,00			0.470
Total Revenue	\$	23,980	_\$_	24,024	\$	(44)	-0.2%
Wages	\$	214	\$	216	\$	2	0.9%
Fringes Services		- 472		-		-	-
Purchased Transportation		20,500		483 20,504		11	2.3%
Materials		20,500		20,504		4	0.0%
Energy		2,813		2,815		2	0.1%
Risk Management		-		-		-	-
General and Administrative		6		6		-	0.0%
Vehicle/Facility Lease		-					-
Total Costs	_\$	24,004	\$	24,024	\$	20	0.1%
Total Revenue Less Total Costs	\$	(25)	\$	-	\$	(25)	100.0%
Net Operating Subsidy	\$	(14,766)	\$_	(14,684)	\$		

#### CONTRACT SERVICES - FIXED ROUTE

# FINANCIAL COMPARISON TO BUDGET SEVEN MONTHS ENDING JANUARY 31, 2005

			CURI	REN	T MONTH	CO	MPARISC	N		ΥE	AR 1	TO DATE (	COMI	PARISON			FULL	YE/	AR
FY Month:			ACTUAL		MENDED BUDGET	VA	ARIANCE	% VAR	A	CTUAL		MENDED BUDGET	V	ARIANCE	% VAR		AMENDED BUDGET	R	EMAINING
REVENUÉ	Passenger Fares Advertising	\$	1,230,048	\$	1,318,000	\$	(87,952) -	-6.7% -	\$	9,237,634	\$	9,340,000	\$	(102,366)	-1.1% -	\$	15,200,000	\$	5,962,366 -
	Contracted Service Revenue Other		-			-		<u>.                                    </u>				<u>:</u>		<u>-</u>					
	Total Operating Revenue Subsidy		1,230,048 2,212,533		1,318,000 2,164,700	\$	(87,952) 47,833	-6.7% 2.2%	1	9,237,634 4,741,908		9,340,000 14,684,000	<u>*</u>	(102,366) 57,908	-1.1% 	_	15,200,000 26,341,900 41,541,900		5,962,366 11,599,992 17,562,358
EXPENSES	Total Revenue	\$	3,442,581	\$	3,482,700	\$	(40,119)	-1.2%	\$ 2	3,979,542	Þ	24,024,000	\$	(44,458)	-0.2%		41,041,300	•	17,002,000
	Personnel Wages Fringes	\$	29,303	\$	30,000	\$	697	2.3%	\$	213,760	\$	216,000	\$	2,240 -	1.0%	\$	397,000	\$	183,240
	Total Personnel	\$	29,303	\$	30,000	\$	697	2.3%	\$	213,760	\$	216,000	\$	2,240	1.0%	\$	397,000	\$	183,240
,	Outside Services Security Repair/Maintenance Services Engine and Transmission Rebuild Other Outside Services Purchased Transportation Other Contracted Bus Services	\$	(700) - 37,451 35,006 2,987,029	\$	38,000 38,000 2,990,000	\$	700 - 549 2,994 2,971	1.4% 7.9% 0.1%	\$	9,093 - 172,885 290,586 0,499,557	\$	9,900 - 176,000 297,000 20,504,000	\$	3,115 6,414 4,443	8.2% - 1.8% 2.2% 0.0%	\$	45,000 - 417,000 590,700 35,267,000	\$	35,907 - 244,115 300,114 14,767,443
	Total Outside Services	\$	3,058,786	\$	3,066,000	\$	7,214	0.2%	\$ 2	0,972,121	\$	20,986,900	\$	14,779	0.1%	\$	36,319,700	\$	15,347,579
	Materials & Supplies Lubricants Tires Other Materials and Supplies	\$	•	\$	· ·	* <b>\$</b>	- - -	<u>.</u>	\$	· -	\$	- - -	\$	<u>-</u>	-	\$ 	<u>.</u>	\$	· ·
	Total Main. Parts and Supplies	\$	-	\$	-	\$	•	•	\$	-	\$	-	\$	•	-	\$	-	\$	•
	Energy Diesel Fuel CNG Fuel and Electricity for Facilities	\$	125,933 257,582	\$	126,000 260,000	\$	67 2,418 -	0.1% 0.9% 		1,014,327 1,798,199	\$	1,015,000 1,800,000 -	\$	673 1,801 -	0.1% 0.1%	\$	1,760,200 3,031,000	<b>\$</b>	745,873 1,232,801
	Total Energy	\$	383,515	\$	386,000	\$	2,485	0.6%	\$	2,812,526	\$	2,815,000	\$	2,474	0.1%	\$	4,791,200	\$	1,978,674
	Risk Management	\$	-	\$	-	\$	-	•	\$	-	\$		\$	-	-	\$	-	\$ \$	- 8,291
	General and Administrative	\$	551	\$	700	\$	149	21.3%	\$ \$	5,709	\$ \$	6,100	\$ \$	391	6.4%	\$ \$	14,000 20,000	\$ \$	20,000
	Vehicle/facility Lease  TOTAL EXPENSES	\$ \$	(5,000) <b>3,467,155</b>	\$ \$	- 3,482,700	\$ \$	5,000 <b>15,545</b>	- 0.4%	•	- 4,004,116	•	24,024,000	\$	19,884	0.1%		41,541,900		17,537,784
	Total Revenue Less Total Costs	<u>\$</u>		\$	-	\$	(24,574)		\$	(24,574)	\$		\$	(24,574)	•	\$	•	\$	24,574
	NET OPERATING SUBSIDY	\$	(2,237,107)	\$ (	(2,164,700)	\$	(72,407)	-3.3%	\$(1	4,766,482)	\$ (	(14,684,000)	\$	(82,482)	-0.6%	_\$_	(26,341,900)	<u>\$</u>	(11,575,418)

#### **CONTRACT SERVICES - PARATRANSIT**

#### COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005 (in \$000's)

			No.	MON	TH		
	A	CTUAL		MENDED UDGET	VAR	IANCE	% VARIANCE
Fare Revenue Other Revenue	\$	135	\$	100	\$	35	35.0%
Total Operating Revenue Subsidy	\$	135 734	\$	100 748	\$	35 (14)	35.0% -1.9%
Total Revenue	\$	869	\$	848	\$	21	2.5%
Wages Fringes	\$	19 -	\$	20	\$	1	5.0%
Services Purchased Transportation Materials		36 716		37 720		1 4	2.7% 0.6%
Energy Risk Management		69 -		70 ~		- 1 -	1.4%
General and Administrative Vehicle/Facility Lease		<del>-</del>		1		<u>-</u>	0.0%
Total Costs	\$	841	\$	848	_\$	7	0.8%
Total Revenue Less Total Costs		28	\$		\$	28	100.0%
Net Operating Subsidy	\$	(706)	\$	(748)	\$	42	5.6%
			4.50	YEAR TO	DATE		
	A	CTUAL		YEAR TO IENDED UDGET		IANCE	% VARIANCE
Fare Revenue Other Revenue	<b>A</b>	<b>CTUAL</b> 810		IENDED			
			В	IENDED UDGET 780	VAR	IANCE	VARIANCE
Other Revenue  Total Operating Revenue	\$	810 - 810	\$ ——	780 - 780	VAR \$	30 30	3.8% 
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages	\$ 	810 - 810 5,446	\$ 	780 - 780 5,471	<b>VAR</b> \$	30 - 30 (25)	3.8% 
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation	\$ \$ 	810 - 810 5,446 <b>6,256</b>	\$ \$ \$	780 - 780 5,471	* *	30 - 30 (25) 5	3.8% 
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management	\$ \$ 	810 - 810 5,446 <b>6,256</b> 136 - 295	\$ \$ \$	780 - 780 5,471 6,251	* *	30  30 (25) <b>5</b> 4 - 5	3.8% -0.5% 0.1% 2.9% -1.7%
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy	\$ \$ 	810 - 810 5,446 <b>6,256</b> 136 - 295 5,203	\$ \$ \$	780 5,471 6,251 140 - 300 5,214	* *	30 	3.8% -0.5% 0.1% 2.9% -1.7% 0.2%
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management General and Administrative	\$ \$ 	810 - 810 5,446 <b>6,256</b> 136 - 295 5,203 - 539 -	\$ \$ \$	780 - 780 5,471 6,251 140 - 300 5,214 - 543 - 2	* *	30 	3.8% -0.5% -0.1% -1.7% -0.2% -0.7% -0.0%
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management General and Administrative Vehicle/Facility Lease	\$ \$ \$	810 - 810 5,446 <b>6,256</b> 136 - 295 5,203 - 539 - 2 53	\$ \$ \$ \$	780 - 780 5,471 6,251 140 - 300 5,214 - 543 - 2 53	*  \$  \$  \$	30305111	3.8% -0.5%  0.1% 2.9% -1.7% 0.2% -0.7% -0.0% 0.0%

#### **CONTRACT SERVICES - PARATRANSIT**

# FINANCIAL COMPARISON TO BUDGET SEVEN MONTHS ENDING JANUARY 31, 2005

			CUF	REN	IT MONT	н со	MPARIS	ON		YE	AR	TO DATE	COM	PARISON			FULI	YE	AR
FY Month:	7		ACTUAL		AMENDED BUDGET	V	ARIANCE	% VAR		ACTUAL		AMENDED BUDGET	V	ARIANCE	% VAR	_	AMENDED BUDGET	F	REMAINING
REVENUE																			
	Passenger Fares Advertising	\$	135,003	\$	100,000	\$	35,003	35.0%	\$	809,899	\$	780,000	\$	29,899	3.8%	\$	1,535,000	\$	725,101
	Contracted Service Revenue				:		-	•		•				-	-		•		
	Other	_	•		•			<del></del>	_			-		-					·
	Total Operating Revenue	\$	135,003	\$	100,000	\$	35,003	35.0%	\$	809,899	\$	780,000	\$	29,899	3.8%	\$	1,535,000	\$	725,101
	Subsidy	_	733,919		747,539		(13,620)	1.8%		5,446,092	_	5,471,329		(25,237)	-0.5%	_	9,791,429	_	4,345,337
	Total Revenue	\$	868,922	\$	847,539	\$	21,383	2.5%	\$	6,255,991	\$	6,251,329	\$	4,662	0.1%	\$	11,326,429	\$	5,070,438
EXPENSES	;																		
	<u>Personnel</u>																		
	Wages	\$	18,676	\$	20,000	\$	1,324	6.6%	\$	135,686	\$	140,000	\$	4,314	3.1%	\$	271,000	\$	135,314
	Fringes		-		-	-					_	-		-		_	-		-
	Total Personnel	\$	18,676	\$	20,000	\$	1,324	6.6%	\$	135,686	\$	140,000	\$	4,314	3.1%	\$	271,000	\$	135,314
	Outside Services																		
	Security	\$	-	\$	•	\$	-	-	\$	-	\$		\$	-	•	\$	•	\$	-
·	Repair/Maintenance Services Engine and Transmission Rebuild		-				-	-		9,859		-		- (9,859)	-		-		(9,859)
	Other Outside Services		36,239		37,000		761	2.1%		285,349		300,000		14,651	4.9%		534,300		248,951
	Purchased Transportation		715,982		720,000		4,018	0.6%		5,202,982		5,214,000		11,018	0.2%		9,305,000		4,102,018
	Other Contracted Bus Services		-						_	-				-	<del></del>	_			
	Total Outside Services	\$	752,221	\$	757,000	\$	4,779	0.6%	\$	5,498,190	\$	5,514,000	\$	15,810	0.3%	\$	9,839,300	\$	4,341,110
	Materials & Supplies																		
	Lubricants	\$	-	\$	-	\$	-	•	\$	-	\$	•	\$	-	-	\$	-	\$	•
	Tires Other Materials and Supplies		-		-		-	•		-		-		•	-		-		-
	• •	_		_					_		_								
	Total Main. Parts and Supplies	\$	-	\$	-	\$	-	•	\$	•	\$	-	\$	•	-	\$	-	\$	-
	Energy Diesel Fuel	\$	69,172	\$	70,000	•	900	4.00/	•	500 470	•	F 40 000		0.500		_		_	
	CNG	Ą	69,172	Ф	70,000	\$	828	1.2%	\$	539,472	\$	543,000	\$	3,528	0.6%	\$	943,929	\$	404,457
	Fuel and Electricity for Facilities		-							<del></del>									•
	Total Energy	\$	69,172	\$	70,000	\$	828	1.2%	\$	539,472	\$	543,000	\$	3,528	0.6%	\$	943,929	\$	404,457
	Risk Management	\$	•	\$	-	\$	-		\$	-	\$	-	\$	-	-	\$	94,000	\$	94,000
	General and Administrative	\$	539	\$	539	\$		0.0%	\$	1,541	\$	1,541	\$	-	0.0%	\$	6,000	\$	4,459
	Vehicle/facility Lease	\$	-	\$	-	\$	•	-	\$	52,788	\$	52,788	\$	-	0.0%	\$	172,200	\$	119,412
	TOTAL EXPENSES	\$	840,608	\$	847,539	_\$_	6,931	0.8%	\$	6,227,677	\$	6,251,329	\$	23,652	0.4%	\$	11,326,429	\$	5,098,752
	Total Revenue Less Total Costs	_\$_	28,314	\$	•	\$	28,314	-	<u>\$</u>	28,314	\$	•	\$	28,314	-	\$	•	\$	(28,314)
	NET OPERATING SUBSIDY	\$	(705,605)		(747,539)	\$	41,934	5.6%	\$ (	(5,417,778)	\$	(5,471,329)	\$	63,551	1.0%	\$	(9,791,429)	\$	(4,373,661)

#### **CHULA VISTA TRANSIT - CONSOLIDATED TRANSIT**

#### COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005 (in \$000's)

		(111 4000	3,				
				MON	TH		-11
	AC	TUAL		DGET	VARI	ANCE	% VARIANCE
Fare Revenue Other Revenue	\$	194 -	\$	193 	\$	1	0.5%
Total Operating Revenue Subsidy	\$	194 355	\$	193 358	\$	1 (4)	0.5% 1.1%
Total Revenue	\$	549	\$	551	\$	(3)	-0.5%
Wages Fringes Services Purchased Transportation Materials Energy Risk Management General and Administrative Vehicle/Facility Lease	\$	61 - 19 404 - 65 - -	\$	62 - 19 403 - 67 - 1	\$	1 - (1) - 2 - -	1.6% - 0.0% -0.2% - 3.0% - -
Total Costs	_\$	549	\$	551	\$	3_	0.5%
Total Revenue Less Total Costs	\$	•	\$	•		-	-
Net Operating Subsidy	\$	(355)	\$	(358)	\$	44	1.1%
	AC	CTUAL		YEAR TO ENDED IDGET		IANCE	% VARIANCE
	_		_		_		

				YEAR TO	DATE		
				ENDED			%
	A	CTUAL	B	JDGET	VARI	IANCE	VARIANCE
Fare Revenue Other Revenue	\$	1,457	\$	1,458 	\$	(1) -	-0.1% 
Total Operating Revenue Subsidy	\$	1,457 2,288	\$	1,458 2,288	\$	(1) -	-0.1% 
Total Revenue	\$	3,745	\$	3,746	\$	(1)	0.0%
Wages Fringes	\$	376	\$	373 -	\$	(3)	-0.8% -
Services		111		111		1	0.9%
Purchased Transportation		2,793		2,793		(1)	0.0%
Materials		<u>.</u>		-		-	-
Energy		451		457		5	1.1%
Risk Management General and Administrative Vehicle/Facility Lease		- 13 -		12		(1)	-8.3% 
Total Costs	\$	3,745	_\$	3,746	\$	1_	0.0%
Total Revenue Less Total Costs	\$	-	\$	-	\$	-	
Net Operating Subsidy	\$	(2,288)	\$	(2,288)	\$	-	0.0%

#### CHULA VISTA TRANSIT - CONSOLIDATED TRANSIT

# FINANCIAL COMPARISON TO BUDGET SEVEN MONTHS ENDING JANUARY 31, 2005

	•		CUR	REN	T MONTH	l COI	MPARISC	N		YE	AR	TO DATE	COMF	ARISON			FULL	YE/	AR
FY Month:	7.3		ACTUAL		MENDED BUDGET	VA	RIANCE	% VAR		ACTUAL		AMENDED BUDGET	VA	RIANCE	% VAR		MENDED BUDGET	R	EMAINING
REVENUE																			
	Passenger Fares Advertising	\$	194,131	\$	193,000	\$	1,131	0.6%	\$	1,456,747	\$	1,458,000	\$	(1,253)	-0.1% -	\$	2,425,000	\$	968,253
	Contracted Service Revenue		-		-		-	-		-		-		•	•		•		-
	Other		<del></del>	_			-	<u> </u>		<del></del>					<del>.</del>		•	_	•
	Total Operating Revenue	\$	194,131	\$	193,000	\$	1,131	0.6%	\$	1,456,747	\$	1,458,000	\$	(1,253)	-0.1%	\$	2,425,000	\$	968,253
	Subsidy		354,795		358,426		(3,631)	1.0%		2,287,816	_	2,287,782		34	0.0%	_	4,377,218	_	2,089,402
	Total Revenue	\$	548,926	\$	551,426	\$	(2,500)	-0.5%	\$	3,744,563	\$	3,745,782	\$	(1,219)	0.0%	\$	6,802,218	\$	3,057,655
EXPENSES	•																		
	Personnel																		
	Wages Fringes	\$	60,785	\$	61,976	\$	1,191	1.9%	\$	375,918	\$	372,832	\$	(3,086)	-0.8% -	\$	653,589	\$	277,671
	ringes	_	<u> </u>	_					_	<del></del>								_	<u>-</u>
	Total Personnel	\$	60,785	\$	61,976	\$	1,191	1.9%	\$	375,918	\$	372,832	\$	(3,086)	-0.8%	\$	653,589	\$	277,671
	Outside Services																		
	Security	\$		\$		\$	-	-	\$	-	\$	-	\$	-	-	\$	-	\$	
	Repair/Maintenance Services Engine and Transmission Rebuild		5,831 2,139		6,000 2,000		169 (139)	2.8% -7.0%		58,697 10,742		58,500 11,000		(197) 258	-0.3% 2.3%		107,492 81,203		48,795 70,461
	Other Outside Services		10,968		11,000		32	0.3%		41,746		42,300		554	1.3%		188,814		147,068
	Purchased Transportation		403,760		402,500		(1,260)	-0.3%		2,793,137		2,792,500		(637)	0.0%		4,854,593		2,061,456
	Other Contracted Bus Services	_								-	_	-					<del></del>		
	Total Outside Services	\$	422,698	\$	421,500	\$	(1,198)	-0.3%	\$	2,904,322	\$	2,904,300	\$	(22)	0.0%	\$	5,232,102	\$	2,327,780
	Materials & Supplies																		
	Lubricants	\$	-	\$	-	\$	•	-	\$	-	\$	-	\$	-	•	\$	•	\$	•
	Tires Other Materials and Supplies		•		-		•	-		-				-	:		-		-
	• •																	_	
	Total Main. Parts and Supplies	\$	-	\$	-	\$	•	-	\$	-	\$	-	\$	-	-	\$	•	\$	•
	Energy	\$	11,415	\$	12,000	\$	585	4.9%	\$	78,295	\$	82,000	\$	3,705	4.5%	s	142,618	\$	64,323
	Diesel Fuel CNG	Ð	43,676	Φ	45,000	Ą	1,324	2.9%	Φ	305,957	Φ	307,000	Ψ	1.043	0.3%	φ	550,462	Φ	244.505
	Fuel and Electricity for Facilities		9,965		10,250		285	2.8%		67,165		67,550		385	0.6%		122,517		55,352
	Total Energy	\$	65,056	\$	67,250	\$	2,194	3.3%	\$	451,417	\$	456,550	\$	5,133	1.1%	\$	815,597	\$	364,180
	Risk Management	\$	-	\$	-	\$	-	-	\$	-	\$	-	\$	-	-	\$	62,700	\$	62,700
	General and Administrative	\$	387	\$	700	\$	313	44.7%	\$	12,906	\$	12,100	\$	(806)	-6.7%	\$	38,230	\$	25,324
	Vehicle/facility Lease	\$	-	\$	-	\$	-	-	\$		\$	-	\$	-	-	\$	-	\$	-
	TOTAL EXPENSES	_\$_	548,926	_\$_	551,426	_\$	2,500	0.5%	\$	3,744,563	\$	3,745,782	\$	1,219	0.0%	\$	6,802,218	\$	3,057,655
	Total Revenue Less Total Costs	<u>\$</u>		\$		\$	(0)	-	\$	•	<u>\$</u>	•	\$	0	•	_\$	·	\$	
	NET OPERATING SUBSIDY	\$	(354,795)	\$	(358,426)	\$	3,631	1.0%	\$	(2,287,816)	\$	(2,287,782)	\$	(34)	0.0%	\$	(4,377,218)	\$	(2,089,402)

#### **NATIONAL CITY TRANSIT**

#### COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005 (in \$000's)

				MON	ITH		
	A	CTUAL		MENDED UDGET		IIANCE	% VARIANCE
Fare Revenue Other Revenue	\$	96 	\$	104 (1)	\$	(7)	-6.7% 
Total Operating Revenue Subsidy	\$	96 125	\$	104 123	\$	(7) 1	-6.7% 0.8%
Total Revenue	\$	221	\$	227	\$	(6)	-2.6%
Wages Fringes Services	\$	93 23 32	\$	98 22 35	\$	5 (2) 3	5.1% -9.1% 8.6%
Purchased Transportation Materials Energy		- 17 26		- 17		1	- 5.9%
Risk Management General and Administrative Vehicle/Facility Lease		29 1 		25 28 1		(1) (1) 1	-4.0% -3.6% 100.0%
Total Costs	_\$	221	\$	227	\$	6	2.6%
Total Revenue Less Total Costs	\$		\$	-	\$	•	-
Net Operating Subsidy	\$	(125)	\$	(123)	\$	(1)	-0.8%
				YEAR TO	DATE		
	A	CTUAL		YEAR TO IENDED UDGET		IANCE	% VARIANCE
Fare Revenue Other Revenue	<b>A</b> /	755		IENDED		(8)	
		755	В	IENDED UDGET 763	VAR	(8)	VARIANCE
Other Revenue  Total Operating Revenue	\$ —	755 - 755	\$ 	763 (1)	VAR \$	(8)	-1.0% -1.0%
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes	\$ 	755 - 755 737	\$ 	763 (1) 763 763 763	<b>VAR</b> \$	(8) - (8) (19)	-1.0% -1.0% -2.5% -1.8%
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages	\$ \$ \$	755 755 737 <b>1,491</b> 696 142 194	\$ 	763 (1) 763 756 <b>1,518</b> 703 152 193	*	(8) (19) (27) 7 9 (1)	-1.0% -2.5% -1.8% -1.0% -2.5%
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation	\$ \$ \$	755 755 737 <b>1,491</b> 696 142	\$ 	763 (1) 763 756 1,518	*	(8) (8) (19) (27) 7	-1.0% -1.0% -2.5% -1.8% -1.0% 5.9%
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management General and Administrative	\$ \$ \$	755 - 755 737  1,491  696 142 194 - 82 155 208 13	\$ 	763 (1) 763 756 1,518 703 152 193 - 97 163 198 13	*	(8) (19) (27) 7 9 (1) - 14 8	-1.0% -1.0% -2.5% -1.8% -1.8% -1.4% -4.9% -5.1%
Other Revenue  Total Operating Revenue Subsidy  Total Revenue  Wages Fringes Services Purchased Transportation Materials Energy Risk Management General and Administrative Vehicle/Facility Lease	\$ \$ \$	755 - 755 737  1,491  696 142 194 - 82 155 208 13 -	\$ \$ \$	763 (1) 763 756 1,518 703 152 193 - 97 163 198 13	\$ \$ \$	(8) (19) (27) 7 9 (1) - 14 8 (10) -	-1.0% -1.0% -2.5% -1.8% -1.8% -0.5% -1.4.4% -4.9% -5.1% -0.0%

#### NATIONAL CITY TRANSIT

#### FINANCIAL COMPARISON TO BUDGET SEVEN MONTHS ENDING JANUARY 31, 2005

			CUR	REN	T MONTH	CO	//PARISO	Ň		YE	AR	TO DATE (	COMF	PARISON			FULL	YE/	\R
FY Month:	7.	,	ACTUAL		MENDED BUDGET	VA	RIANCE	% VAR		ACTUAL		AMENDED BUDGET	VA	RIANCE	% VAR		AMENDED BUDGET	R	EMAINING
REVENUE										754000		700 500	\$	(7.833)	-1.0%	\$	1,300,500	\$	545,832
	Passenger Fares Advertising	\$	96,305 -	\$	103,500	\$	(7,195) -	-7.0% -	\$	754,668 -	\$	762,500 -	Þ	(7,832) -	-1,070	. •	-	Ψ	-
	Contracted Service Revenue Other		-	_			<u> </u>	<u>.                                    </u>	_			-		-				_	<u>-</u>
	Total Operating Revenue Subsidy	\$	96,305 124,598	\$	103,500 123,166	\$	(7,195) 1,432	-7.0% 1.2%	\$	754,668 736,641	\$	762,500 755,988	\$	(7,832) (19,347)	-1.0% 2.6%	\$	1,300,500 1,520,738	\$	545,832 784,097
	Total Revenue	\$	220,903	\$	226,666	\$	(5,763)	-2.5%	\$	1,491,309	\$	1,518,488	\$	(27,179)	-1.8%	\$	2,821,238	\$	1,329,929
EXPENSES																			
	Personnel	_				•		5.00/	•	606.046	\$	703,000	\$	6,984	1.0%	\$	1,208,000	\$	511,984
	Wages Fringes	\$	92,772 23,196	\$	98,000 21,667	\$	5,228 (1,529)	5.3% -7.1%	\$	696,016 142,476	<b></b>	151,667	•	9,190	6.1%	_	260,000	_	117,524
	Total Personnel	\$	115,967	\$	119,667	\$	3,699	3.1%	\$	838,492	\$	854,667	\$	16,175	1.9%	\$	1,468,000	\$	629,508
	Outside Services																		
	Security Repair/Maintenance Services	\$	(147) 3,989	\$	611 6,400	\$	758 2,411	124.1% 37.7%	\$	8,973 24,767	\$	6,944 38,000	\$	(2,028) 13,233	-29.2% 34.8%	\$	10,000 70,000	\$	1,028 45,233
	Engine and Transmission Rebuild		-		-		•	•		-		-		•	- -8.3%		478,000		- 317,646
	Other Outside Services Purchased Transportation		28,510		28,000		(510) -	-1.8% -		160,354 -		148,000		(12,354)	-0.376		478,000		517,040
	Other Contracted Bus Services						-				_				<del></del>	_		_	
	Total Outside Services	\$	32,352	\$	35,011	\$	2,659	7.6%	\$	194,094	\$	192,944	\$	(1,149)	-0.6%	\$	558,000	\$	363,906
	Materials & Supplies					_			_	0.500		4.007	•	1,078	23.1%	\$	8,000	\$	4,412
	Lubricants Tires	\$	1,387 6,614	\$	667 6,000	\$	(720) (614)	-108.1% -10.2%	\$	3,588 13,089	\$	4,667 19,000	\$	5,911	31.1%	<b>D</b>	26,000	Þ	12,911
	Other Materials and Supplies		8,553		10,417		1,864	17.9%	_	65,788		72,917		7,129	9.8%	_	125,000		59,212
	Total Main. Parts and Supplies	\$	16,554	\$	17,083	\$	530	3.1%	\$	82,465	\$	96,583	\$	14,119	14.6%	\$	159,000	\$	76,535
	Energy Diesel Fuel	\$	23,673	\$	23,000	\$	(673)	-2.9%	\$	142,511	\$	148,419	\$	5,908	4.0%	\$	250,838	\$	108,327
	CNG Fuel and Electricity for Facilities		- 2,166		- 2,117		- (49)	- -2.3%		12,566		- 14,817		- 2,251	- 15.2%		25,400		12,834
	Total Energy	s	25,838	s	25,117	\$	(722)	-2.9%	s	155,077		163,236	\$	8,159	5.0%	\$	276,238	\$	121,161
	Risk Management	\$	29,423	\$	28,333	\$	(1,090)	-3.8%	\$	208,491	\$	198,333	\$	(10,158)	-5.1%	\$	340,000	\$	131,509
	General and Administrative	\$	769	\$	1,455	\$	686	47.2%	\$	12,691	\$	12,725	\$	34	0.3%	\$	20,000	\$	7,309
	Vehicle/facility Lease	\$	-	\$		\$		-	\$	-	\$	-	\$	•	•	\$		\$	-
	TOTAL EXPENSES	_\$_	220,903	<u>\$</u>	226,666	\$	5,763	2.5%	_\$_	1,491,309	_\$_	1,518,488	\$	27,179	1.8%	_\$_	2,821,238	\$	1,329,929
	Total Revenue Less Total Costs	\$	•	<u>\$</u>		\$	•	•	\$	·	\$		\$	(0)		\$		\$	•
	NET OPERATING SUBSIDY	\$	(124,598)	\$	(123,166)	\$	(1,432)	-1.2%	\$	(736,641)	\$	(755,988)	\$	19,347	2.6%	\$	(1,520,738)	\$	(784,097)

#### **CORONADO FERRY**

#### COMPARISON TO BUDGET - FY 2005 JANUARY 31, 2005 (in \$000's)

			MON	TH		
	AC.	TUAL	NDED DGET	VAR	IANCE	% VARIANCE
Fare Revenue Other Revenue	\$	<u>-</u>	\$ -	\$	-	
Total Operating Revenue Subsidy	\$	- 11	\$ 11	\$	-	0.0%
Total Revenue	\$	11	\$ 11	\$	-	0.0%
Wages Fringes Services	\$	<u>-</u> -	\$ -	\$	-	-
Purchased Transportation Materials		11 -	- 11 -		- - -	0.0%
Energy Risk Management General and Administrative Vehicle/Facility Lease		- - -	 - - - -		- - - -	- - -
Total Costs	\$	11	\$ 11	\$	-	0.0%
Total Revenue Less Total Costs	\$	-	\$ -	\$	-	
Net Operating Subsidy	\$	(11)	\$ (11)	\$	-	0.0%
			YEAR TO	DATE		-
	AC	TUAL	NDED DGET	VAR	IANCE	% VARIANCE
Fare Revenue Other Revenue	\$	<u>-</u>	\$ -	\$	<del>-</del>	
Total Operating Revenue Subsidy	\$	- 76	\$ - 76	\$	-	0.0%
Total Revenue	\$	76	\$ 76	_\$	-	0.0%
Wages Fringes Services	\$	- - ,	\$ -	\$	-	- -
Purchased Transportation Materials		- 76 -	- 76 -		- - -	0.0%
Energy Risk Management General and Administrative Vehicle/Facility Lease		- - -	- - -		- - -	- - -
Total Costs	\$	76	\$ 76	\$	-	0.0%
Total Revenue Less Total Costs	\$	-	\$ •	\$	-	

#### CORONADO FERRY

# FINANCIAL COMPARISON TO BUDGET SEVEN MONTHS ENDING JANAUARY 31, 2005

			CUR	REN	T MONTI	H CON	IPARIS	ON		ΥI	EAR 1	O DATE	COMP	ARISON	ı		FULL	. YEA	R
FY Month:	7	,	ACTUAL		MENDED BUDGET	VAI	RIANCE	% VAR	,	ACTUAL		MENDED BUDGET	VA	RIANCE	% VAR		MENDED BUDGET	RE	MAINING
REVENUE										i									
	Passenger Fares	\$	-	\$	-	\$	-	-	\$		\$	-	\$	-	-	\$	-	\$	-
	Advertising		-		-		-	- '		•		-		-	-		-		-
	Contracted Service Revenue Other		-		-		-	-		-		•		-	-		•		-
	oute.							<del></del>		<del>-</del>	_								
	Total Operating Revenue	\$		\$	-	\$	-	-	\$		\$	-	\$	-	-	\$	-	\$	
	Subsidy		10,927		10,927			0.0%		76,489		76,489			0.0%		131,124		54,635
	Total Revenue	\$	10,927	\$	10,927	\$	•	0.0%	\$	76,489	\$	76,489	\$		0.0%	\$	131,124	\$	54,635
EXPENSES																			
	Personnel Wages	e		\$		•										_		_	
	Fringes	\$	•	\$	-	\$	-	•	\$	•	\$	-	\$	•	-	\$	-	\$	-
	355			_				<del></del>			_				<del></del>				
	Total Personnel	\$	-	\$	•	\$	-	-	\$	•	\$	-	\$	-	-	\$	-	\$	-
	Outside Services																		
	Security	\$	-	\$	_	\$	_	-	\$	_	\$	_	\$		_	\$	_	\$	
	Repair/Maintenance Services		-	•	-	•	-	-	•	-	•	-	•	_	-	•	-	•	-
	Engine and Transmission Rebuild		•		-		•	-		-		-		-	-		-		-
	Other Outside Services		-		-		-	. <del>.</del>		. •		-		• -	-		-		-
	Purchased Transportation Other Contracted Bus Services		10,927		10,927		-	0.0%		76,489		76,489		•	0.0%		131,124		54,635
	Other Contracted Bus Services				<del></del>	-	<u> </u>	<del></del>		<del></del>				<del></del> -			<del></del>		<u> </u>
	Total Outside Services	\$	10,927	\$	10,927	\$	-	0.0%	\$	76,489	\$	76,489	\$	-	0.0%	\$	131,124	\$	54,635
	Materials & Supplies																		
	Lubricants	\$	_	\$	_	\$	_	-	\$		\$	_	\$		_	\$	_	\$	_
	Tires	•	-	•	-	•	-		•	-	•	-	•		_	•	-	Ψ	-
	Other Materials and Supplies		-											<u> </u>			-		
	Total Main. Parts and Supplies	\$	-	\$	-	\$	-	-	\$	-	\$	-	\$	-	-	\$	-	\$	-
	Energy																		
	Diesel Fuel	\$	-	\$		\$	-	-	\$	_	\$	_	\$	-		\$		\$	
	CNG		-		-		-	-	•	-	•	-	•	-		•	-	•	-
	Fuel and Electricity for Facilities	_	<u> </u>																
	Total Energy	\$	-	\$	-	\$	-	-	\$	-	\$	-	\$	-	-	\$	-	\$	-
	Risk Management	\$	-	\$	•	\$	-	•	\$	-	\$	•	\$	-	-	\$	-	\$	-
	General and Administrative	\$	-	\$	-	\$		-	\$	-	\$	-	\$	-	-	\$		\$	-
	Vehicle/facility Lease	\$		\$	-	\$		-	\$		\$	-	\$	-	-	\$		\$	
	TOTAL EXPENSES	\$	10,927	\$	10,927	\$		0.0%	\$	76,489	\$	76,489	\$	-	0.0%	\$	131,124	\$	54,635
	Total Revenue Less Total Costs	\$		\$		\$			\$	-	\$		\$		-			\$	-
	NET OPERATING SUBSIDY	\$	(10,927)	\$	(10,927)	\$		0.0%	<u> </u>	(76,489)	\$	(76,489)	\$		0.0%	\$	(131,124)	\$	(54,635)
						<del></del>					Ť	,,,	<del></del>				(.01,12-7)		(34,000)



Net Operating Subsidy Varia January 2005	ince Si	ımmary		
•		n to Date		to Date
Combined Personnel Expenses	\$	160	\$	85
Outside Services, Materials and G&A Expenses		28		78
Rail Operations Fare Revenue		69		69
Combined Energy Expenses		(36)		29
Internat Bus Operations Fare Revenue		(8)		1
Combined Risk Expenses		(80)		(114)
Advertising Revenue Demand Lower		(63)		(64)
All Other Net Operations Over Budget		(59)		(81)
Overall net operating subsidy positive variance	\$	11	\$	3
MTS		• •	•	00

SAN DIEGO METI	ROPOLITAN	TRANSIT SY	STEM	
	MBINED OPERAT			
TRANSIT OPERATORS N	IET SUBSIDY AN	D OTHER EXPEN	DITURES	
COMPARISON T	TO AMENDED BL	JDGET - FY 2005	1	
J	ANUARY 31, 20	05		
	(in \$000's)			
	300 3714	MON	TH	
		AMENDED .		
	ACTUAL	BUDGET	VARIANCE	% VARIANCE
Transit Operators' Net Subsidy				
Internal Bus Operations	5,069	4,965	(103)	-2.1%
Rail Operations	1,560	1,703	143	8.4%
Contracted Bus Operations - Pixed Route	2,237	2,165	(72)	-3.3%
Contracted Bus Operations - Para Transit	706	748	42	5.6X
Other Operators	490	492	3	0.6%
Total Transit Operators Net Subsidy	10,062	10,073	11	0.1%
Other Expenditures				
Administrative Pass Thru	0	a	0	
Taxicab Administration	(527)	(542)	(15)	2.8%
San Diego and Arizona Eastern	10	12	2	14.7%
Debt Service	0	c	0	
General Fund	250	401	150	37.5%
Grand Total Expenditures	9,796	9,944	148	1,5%
MITC		4 6 3	ee	റെ

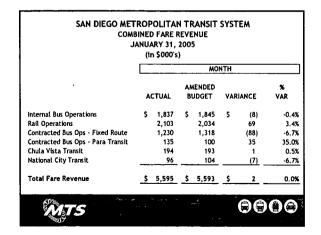
SAN DIEGO MET			STEM	
CO: TRANSIT OPERATORS I	MBINED OPERAT		MINTELIDEE	
	O AMENDED BU			
	TO DATE, JANE			
	(in \$000's)			
		YEAR TI	DATE	
	ACTUAL	AMENDED BUDGET	VARIANCE	% VARIANCE
Transit Operators' Net Subsidy				
Internal Bus Operations	30,827	30,691	(135)	-0.4
Rail Operations	10,412	10,560	148	1.4
Contracted Bus Operations - Fixed Route	14,766	14,684	(82)	-0.6
Contracted Bus Operations - Para Transit	5,418	5,471	54	1.0
Other Operators	3,101	3,120	19	0.6
Total Transit Operators Net Subsidy	64,524	64,527	3	0.0
Other Expenditures				
Administrative Pass Thru	344	344	0	0.0
Taxicab Administration	(125)	(43)	82	-192.9
San Diego and Arizona Eastern	110	119	9	7.3
Debt Service	0	0	0	
General Fund	3,844	4,100	255	6.2
Grand Total Expenditures	68,697	69,047	349	0.59
MTS			06	000

SAN DIEGO M COMBIN COMPARISO	IED MTS TRA N TO AMEND JANUARY (In \$0	ANSIT OPERA DED BUDGET 31, 2005 00's)	ATORS - FY 2005	
		MOI AMENDED	NTH	
	ACTUAL	BUDGET	VARIANCE	% VAR
Fare Revenue	\$5,595	\$5,593	\$2	0.0%
Other Revenue	60	123	(63)	-51.2%
Total Operating Revenue	5,655	5,716	(61)	-1.1%
Wages/Fringes	7,700	7,860	160	2.1%
Purchased Transportation	4,118	4,123	6	0.1%
Energy	1,679	1,644	(36)	-2.1%
Other Expenses	2,219	2,163	(58)	-2.6%
Total Costs	15,717	15,789	73	0.5%
Net Operating Subsidy	(\$10,062)	(\$10,073)	\$11	0.1%
MTS			99	00

COMPARISO	IED MTS TR. N TO AMENI	ANSIT OPERA DED BUDGET E, JANUARY 100's)	ATORS - FY 2005	
	ACTUAL	AMENDED BUDGET	VARIANCE	% VAR
Fare Revenue	\$41,351	\$41,363	(\$12)	0.0%
Other Revenue	625	689	(64)	-9.3%
Total Operating Revenue	41,976	42,052	(76)	-0.2%
Wages/Fringes	50,041	50,126	85	0.29
Purchased Transportation	28,572	28,587	15	0.19
Energy	11,784	11,813	29	0.29
Other Expenses	16,103	16,053	(51)	-0.39
Total Costs	106,501	106,579	78	0.19
Net Operating Subsidy	(\$64,524)	(\$64,527)	\$3	0.09
MTS	inchi in		99	00

SAN DIEGO METROPOLITAN TRANSIT SYSTEM Fiscal Year 2005 Energy Information				
_	Die	esel	CN	G
_	Actual Rate	Amended Budget Rate	Actual Rate	Amended Budget Rate
January 2005	1.480	1.600	1.058	1.050
YTD January 2005	1.596	1.600	1.033	1.050
MTS	**************************************		******* <b>(</b>	909





1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466, FAX: 619.234.3407

## **Agenda**

Item No. <u>49</u>

Joint Meeting of the Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. OPS 920.1, 960.5, 970.5 (PC 30101, 102, 103)

March 24, 2005

Subject:

MTS: JANUARY MONTHLY PERFORMANCE INDICATORS

#### RECOMMENDATION:

That the Board of Directors receive a report on MTS operators' performance for the month of January 2005.

**Budget Impact** 

None.

#### **DISCUSSION:**

#### Operating Environment

The following report is a summary of the MTS operational statistics for January 2005, month seven of FY 2005. There were 20 operational weekdays, 10 weekend days, and 1 modified service day for the Presidents' Day holiday. Aside from Presidents' Day, January included the Martin Luther King, Jr. holiday for which regular weekday service was provided. Very much like December 2004, January had several days of heavy rain, which continued to provide major challenges to operations. At Fashion Valley Transit Center, the bus routes continued to be on detour for most of the month. On January 30, new service changes went into effect, concurrent with the operator shift changes. Among the new service changes was the first day of bus operations for the new San Diego State University (SDSU) Transit Center.

#### Service Statistics

The following are the relevant service statistics for January 2005 categorized by performance indicator. Charts based on the statistics are provided in Attachments A through D.



#### • Service Effectiveness

- The MTS system carried 5,760,637 passengers in January, with 3,369,915 traveling on MTS buses and 2,390,722 traveling on MTS rail.
- Overall, the system carried 37.04 passengers per revenue hour. MTS bus and rail carried 21.67 and 211.08 passengers per revenue hour, respectively.

#### Service Reliability

- On-Time Performance. MTS's systemwide on-time performance continued to achieve the system goal of 90 percent. MTS bus reported 87.3 percent of its trips as being on time continuing a positive trend since the beginning of FY 2003. MTS rail operated with 95.4 percent of its trips on time continuing a positive trend since the beginning of FY 2005.
- Mean Distance Between Failures (MDBF). The MDBF for MTS bus was 13,679 miles continuing a positive trend for this statistic. There were no failures on MTS rail, so the MDBF was 571,579 car miles, which steadied the decreasing trend of previous months.

#### Quality of Service

- January was a collision-free month for MTS rail. MTS bus had 2.24 total collisions per 100,000 miles, which was a positive change compared to the last three months.
- The trend of non-Americans with Disabilities Act (ADA) customer complaints remained even at 12.59 complaints per 100,000 passengers. There were 12 ADA complaints, which represented only 0.05 percent of total ADA ridership.

Paul C. Jablonski Chief Executive Officer

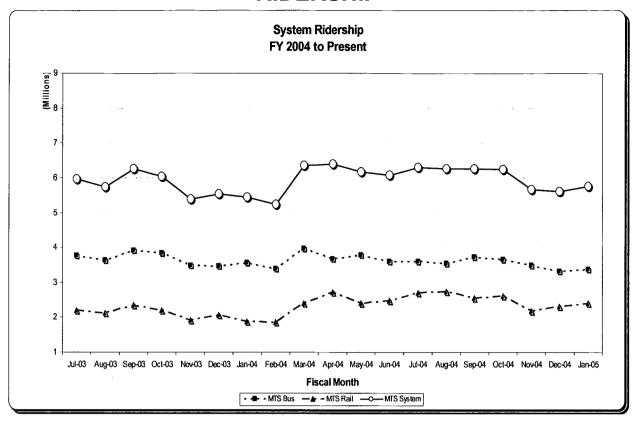
Key Staff Contact: Anika-Aduesa deSilva, 619.595.4901, anika.desilva@sdmts.com

JGarde MAR24-05.49.ADESILVA 3/16/05

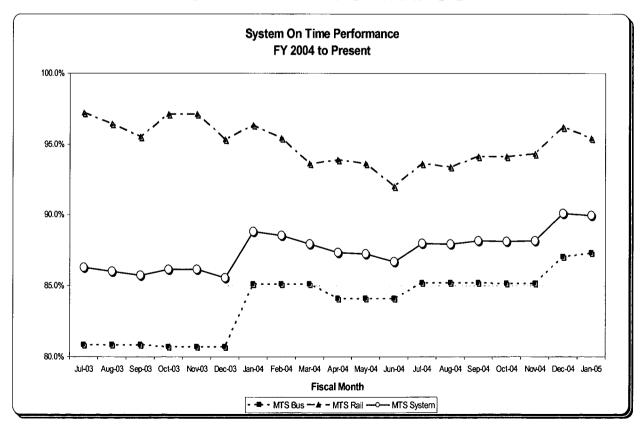
Attachments: A. MTS System Ridership, On-Time Performance (Bus, Rail, System)

- B. MTS Mean Distance Between Mechanical Failures (Bus, Rail)
- C. MTS Total Collision Accidents (Bus, Rail)
- D. MTS Customer Complaints (Non-ADA Service)

### **RIDERSHIP**



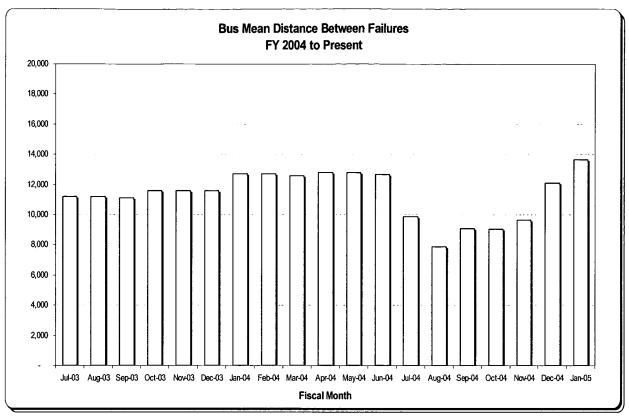
### ON TIME PERFORMANCE

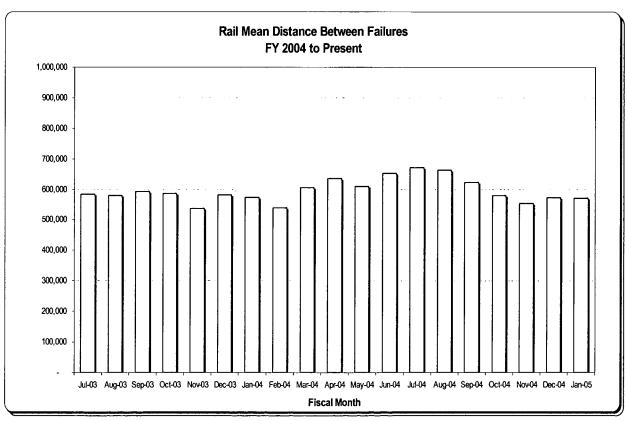






# MEAN DISTANCE BETWEEN MECHANICAL FAILURES

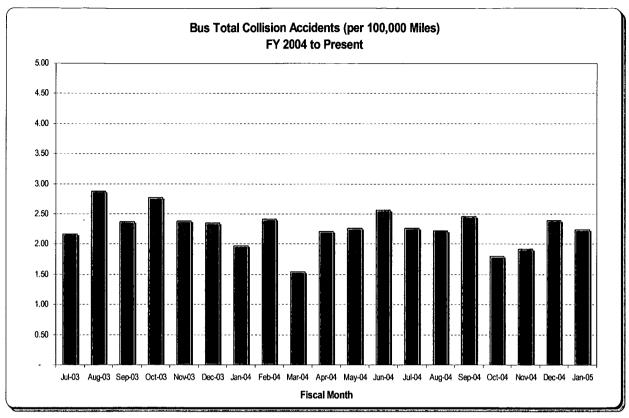


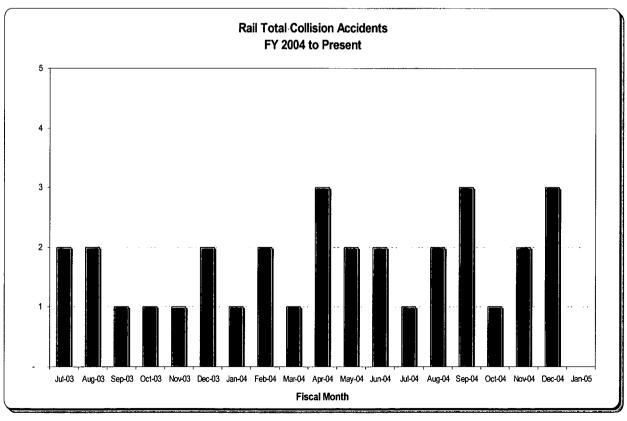






# TOTAL COLLISION ACCIDENTS<sup>OPS 920.1, 960.5, 970.5</sup> (BUS-PER 100,000 MILES; RAIL- ACTUAL)

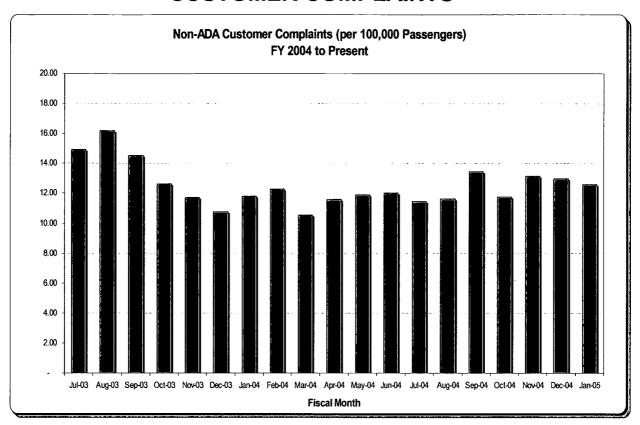






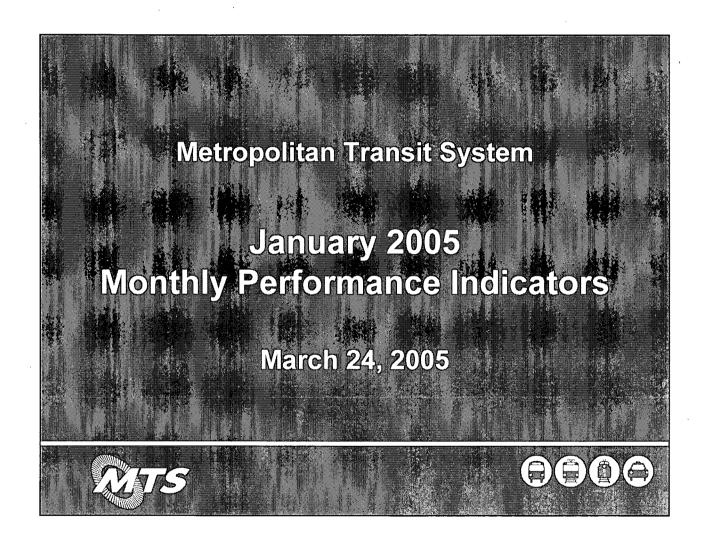


## **CUSTOMER COMPLAINTS**









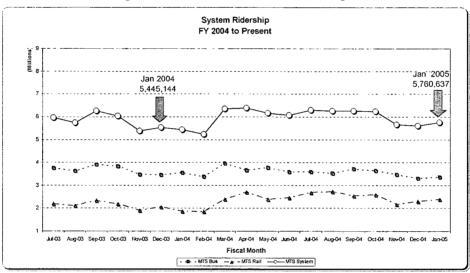
# **Operating Environment**

- Service Levels
  - 24 days of weekday service
  - Martin Luther King Day and Presidents' Day
- Inclement Weather
  - Several rain detours continuing from December
  - Closure of Fashion Valley Road, eroded bridge
- Service Changes
  - New SDSU Transit Center opened January 30
  - New schedules, service and shift changes





# **System Ridership**

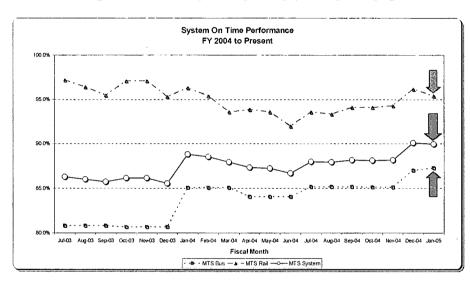


- System carried 5,760,637 passengers in January 2005.
- MTS Bus and Rail carried 21.67 and 211.08 passengers per revenue hour, respectively.





# **On Time Performance**

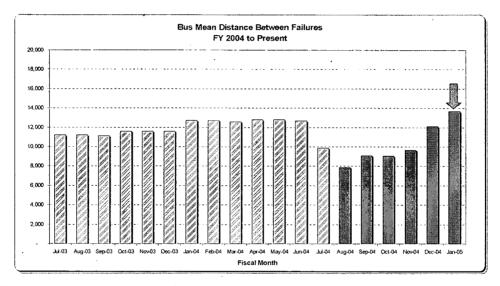


- MTS System achieved 90.0% on time performance. On time performance for MTS Bus (87.3%) showed continued improvement. On time performance for MTS Rail declined to 95.4%.
- · Internal Bus continued to show greatest improvement.





# Mean Distance Between Failures - Bus

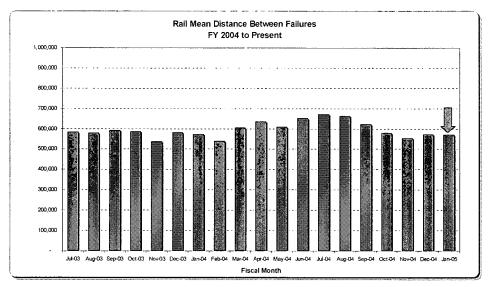


 Mean distance between failures for MTS Bus was 13,679 miles, a continued trend of improvement since August 2004 (note: data does not include Internal Bus performance prior to August 2004).





# Mean Distance Between Failures - Rail



• Mean distance between failures for MTS Rail was 571,579 car miles, steadying the downward trend since July 2004.





# **Customer Complaints**

- Non-ADA complaints remained at 12-13 complaints per 100,000 passengers
- ADA services reported 12 complaints in January 2005, which only represented 0.05% of January 2005 ADA ridership.

# **Collision Accidents**

- MTS Bus collision rate was 2.24 collisions per 100,000 miles in January 2005.
- MTS Rail had an accident-free month in January 2005, the first of the fiscal year.





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## **Agenda**

Item No. <u>50</u>

Joint Meeting of the Board of Directors for Metropolitan Transit System, San Diego Transit Corporation, and San Diego Trolley, Inc. ADM 121.10 (PC 20484)

March 24, 2005

SUBJECT:

MTS: COMPREHENSIVE OPERATIONAL ANALYSIS: PROJECT UPDATE

#### RECOMMENDATION:

That the Board of Directors receive this status report on the Comprehensive Operational Analysis (COA) of MTS services.

**Budget Impact** 

None.

#### DISCUSSION:

The goal of the COA is to evaluate and restructure MTS services and operations to more efficiently and effectively serve the region's transit needs and meet regional transportation goals within the constraints of the current financial and operating environment. This report is intended to update the Board on the status of the project as of March 2005. Efforts this month include the following.

#### Service and Operational Efficiencies

MTS staff and consultants continue to evaluate the ridership, operational, and cost impacts of the draft list of service efficiencies, which includes service reductions, minor route restructures (consolidating, streamlining, and reconfiguring segments), and identification of more efficient terminals. Evaluation efforts have and will include conducting surveys onboard affected routes and trips and collecting input from bus and trolley operators, the public, and project committees at their second meeting.



#### Public Participation

The public outreach efforts for Phase I are well underway.

- Committee Meetings Meetings were conducted with the Blue Ribbon (BRC), Citizen Advisory Committee (CAC), and Technical Advisory Committees (TAC) to provide an overview of the project purpose and process and to discuss the general approaches to achieving the COA goals of a sustainable budget and realigning services to meet the demands of the market. The second series of meetings with these committees will be in April to discuss the specific service efficiencies recommended for early implementation as well as policy choices that will be used to develop alternative transit service concepts or models for the Board's consideration.
- Operator Sessions "Drop-in" sessions were conducted at the following operating divisions to introduce bus and trolley operators to the project process and schedule, collect ideas on how to improve the existing system, and solicit their input on the Phase I efficiencies:
  - > Imperial Avenue Division (Internal Bus)
  - Kearny Mesa Division (Internal Bus)
  - > ATC/Vancom (Contract Bus)
  - ➤ Laidlaw (Contract Bus)
  - San Diego Trolley, Inc.
- These sessions also provided an opportunity to foster productive relationships between operators and MTS planning staff.
- Community Open Houses We are currently conducting community open houses at 12 locations throughout the service area to provide information on the project process and schedule, collect public ideas on how to improve the existing system, find out what works and what does not work within the system, and solicit input on the Phase I efficiencies.

Paul C. Jabionski Chief Executive Officer

Key Staff Contact: Conan Cheung, 619.515.0933, conan.cheung@sdmts.com

JGarde MAR24-05.50.CCHEUNG 3/16/04

#### SAN DIEGO METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

REQUEST TO SPEAK FORM

AGENDA ITEM NO.

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ORDER REQUEST RECEIVED

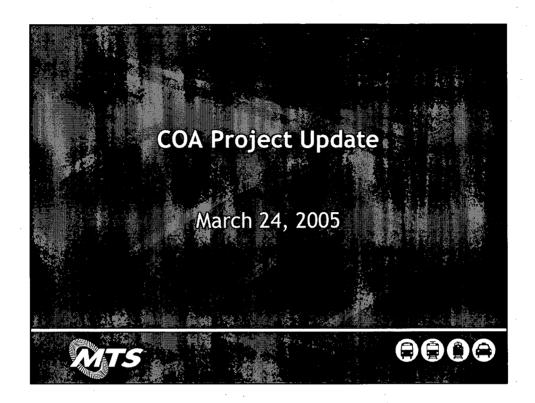
**PLEASE SUBMIT THIS COMPLETED FORM (AND YOUR WRITTEN STATEMENT) TO THE
CLERK OF THE BOARD PRIOR TO DISCUSSION OF YOUR ITEM**
1. INSTRUCTIONS  CLERK OF THE BOARD PRIOR TO DISCUSSION OF YOUR ITEM**  AURING AGENCY:
This Request to Speak form <u>must be filled out and submitted in advance of the discussion of your item</u> to the Clerk of the Board (please attach your written statement to this form). Communications on hearings and agenda items are generally limited to three (3) minutes per person unless the Board authorizes additional time. However, the Chairperson may limit comment to one or two minutes each if there are multiple requests to speak on a particular item. General public comments on items not on the agenda are limited to three (3) minutes. Please be brief and to the point. No yielding of time is allowed. Subjects of previous Hearings or agenda items may not again be addressed under General Public Comments.
Date_ 2005 = 03 - 24
Name (PLEASE PRINT) Clive 12.5 Claud
Address 5:53 Ca Durna 5 +
San Dieco
Telephone 6 5,582 403 (
Organization Represented (if any)
Subject of your remarks: Route 27
Agenda Item Number on which you request to speak
Your comments are presenting a position of: SUPPORT OPPOSITION
2. TESTIMONY AT NOTICED PUBLIC HEARINGS
At Public Hearings of the Board, persons wishing to speak shall be permitted to address the Board on any issue relevant to the subject of the Hearing.
3. DISCUSSION OF AGENDA ITEMS
The Chairman may permit any member of the public to address the Board on any issue relevant to a particular agenda item.

#### 4. GENERAL PUBLIC COMMENTS ON MATTERS NOT ON THE AGENDA

Public comment on matters not on the agenda will be limited to five (5) speakers with three (3) minutes each, under the Public Comment Agenda Item. Additional speakers will be heard at the end of the Board's Agenda.

\*\*REMEMBER: Subjects of previous Hearings or agenda items may not again be addressed under General Public Comments.\*\*

DGunn/SStroh / FORMS REVREQFO.DGUNN — 10/15/03

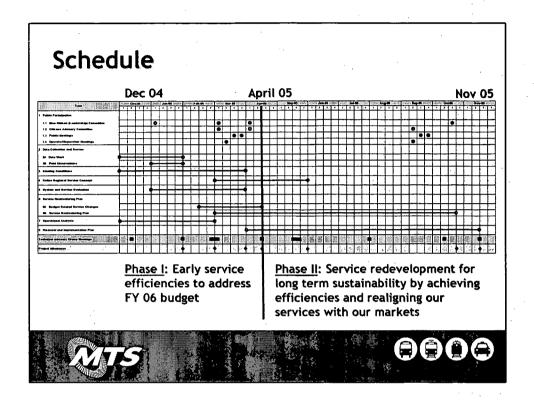


# Why are we conducting the COA?

- Achieve Financial Sustainability
  - Optimize bus and trolley operations (Phase I and II)
  - Reduce or eliminate unproductive and duplicative services to "right size" system (Phase I and II)
  - Increase ridership (revenues) by making transit services more attractive and effective (Phase II)
- Reconnect with our Markets
  - Detailed analysis of what is working and what isn't (Phase II)
  - Identify markets that can and should be served (Phase II)
  - Respond to current mobility needs of our markets (Phase II)
  - Provide type and level of service our markets want and need (Phase II)







# **Service Efficiencies**

FY	<b>Efficiencies</b>	Subsidy Savings/Yr	Public Outreach
2003	Reduce unproductive service     Discontinue 5 DAR/DART     Discontinue special service	\$2.1 million	Public hearing
2004	Reduce unproductive service     Route 34 truncation in Old Town     Route 11 restructure     Reduce service on Presidents Day	\$0.6 million	Public hearing
2005	Reduce unproductive service	\$0.2 million	Public hearing
2006	MVE Bus/Trolley changes     COA Phase I service efficiencies     (unproductive/duplicative     service, minor operational     adjustments)	\$1.5 million (MVE) + COA Phase I service efficiencies	<ul><li>Community open houses</li><li>Operator "drop ins"</li><li>BRC, CAC, TAC meetings</li><li>Public hearing</li></ul>
2007	COA Phase II service redevelopment (reconnect with markets, optimize operations)	COA Phase II service efficiencies	<ul> <li>Community open houses</li> <li>Operator "drop ins"</li> <li>BRC, CAC, TAC meetings</li> <li>Public hearing</li> </ul>





# **Service Efficiency Guidelines**

MTS Policy No. 42 provides guidance for service reductions:

Tier 1 - Eliminate weak performing components of all routes Phase

Tier 2 - Reduce service levels during unproductive hours and days

Criteria: Based on measures or productivity (passengers/mile and hour) and efficiency (subsidy/passenger)

Tier 3 - Conduct a comprehensive evaluation of MTS services to achieve overall subsidy reductions while maintaining lifeline service based on coverage and productivity

Criteria: To be developed in conjunction with BRC and CAC based on policy direction on issues such as: what markets to serve?, coverage vs. productivity, network structure, speed vs. access.

COA Phase



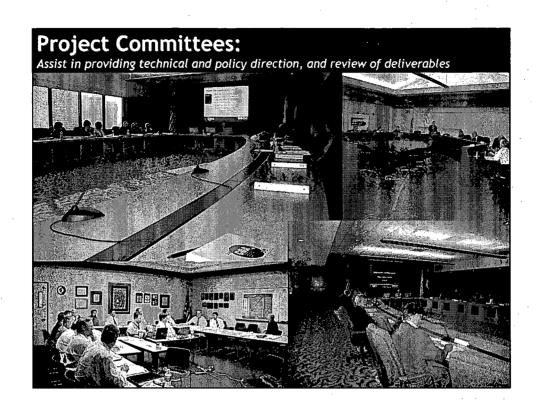
### COA Tool Box - Phase One

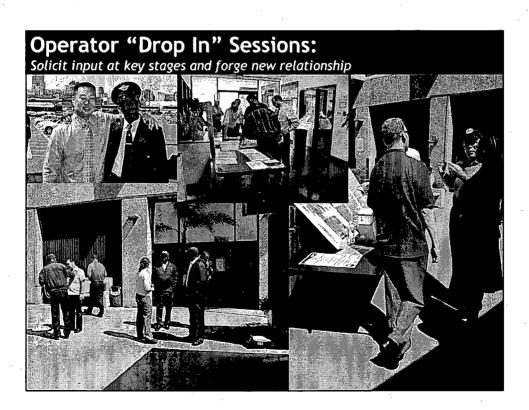


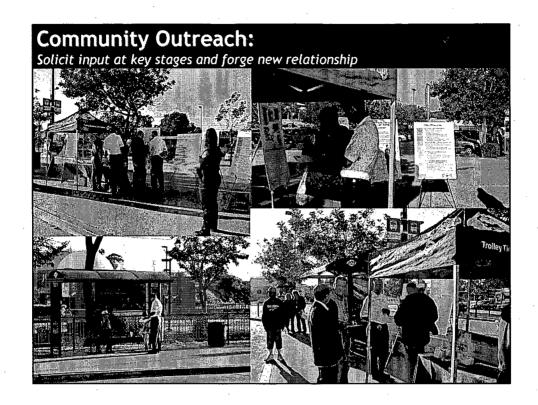
- Adjust Bus and Trolley service
  - Reduce duplicative services that serve the same customers and those that are used by very few customers
  - Combine and link Bus and Trolley services to provide the same services more efficiently
  - Streamline service and reduce transit delay making the service both more attractive for customers and less expensive to operate











# **Public Information**

- Hotline (619-595-3711)
- Email (coa@sdmts.com)
- Web Site (www.sdcommute.com)
- Community Outreach Sessions advertised through: Take Ones, Public Notice, Press Releases, Print Calendar listings
- Newsletter
- COA 'Quick Facts'
- Presentation Boards





1255 Imperial Avenue, Suite 1000 San Diego, CA 92101-7490 619.231.1466 FAX 619.234.3407

# **Agenda**

Item No. <u>61</u>

Chief Executive Officer's Report

ADM 121.7 (PC 30100)

March 24, 2005

#### **Minor Contract Actions**

- Gonzalez White Consulting for DBE consulting services related to the 12<sup>th</sup> & Market Station Reconfiguration Project.
- Berryman and Henigar for construction management services for 12th Avenue Corridor Improvement Project.
- Berryman and Henigar for general engineering services (plan review and right of entry permit) for BOSA's Downtown Electra Condominium Project at Kettner and Broadway.
- West Coast General Corp. for construction services for the 12<sup>th</sup> & Market Station Reconfiguration Project.
- Orion Construction Corp/Balboa Construction, Inc. for construction services for Mission Valley East (MVE) light rail transit (LRT) Extension – SDSU Segment Utilities.
- Clark Construction Group Incorporated for construction services for the MVE LRT Extension SDSU Tunnel and Underground Station.

#### **Contract Matters**

There were no Contract Matters to report.

gail.williams/agenda item 61

