



07-15-13 P03:54 IN

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



REQUEST TO ADD AGENDA ITEMS

TO JULY 18, 2013 BOARD MEETING AGENDA

Pursuant to Government Code section 54954.2(b)(2), MTS staff requests that the Board of Directors add the following agenda items to its July 18, 2013 meeting agenda:

Closed Session Item 24c: CONFERENCE WITH LEGAL COUNSEL – ANTICIPATED LITIGATION – INITIATION OF LITIGATION PURSUANT TO GOVERNMENT CODE SECTION 54956.9(d)(4) (1 Potential Case)

Proposed Action: Provide Instructions to MTS Legal Counsel

The basis for adding these items to the Board of Director's July 18, 2013 agenda is:

- a. There is a need to take immediate action. This relates to litigation that may need to be initiated before the Board's next scheduled meeting on August 15, 2013.
- b. The need for action came to the attention of MTS subsequent to the agenda being posted. Recent developments in the matter this case relates to were not known to legal counsel until after the July 18, 2013 agenda was posted.

The Board of Directors must make the findings listed in A and B above by a two-thirds vote. Therefore, 10 of the 15 Board members must approve adding Item 24c to the agenda.





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*REVISED

Agenda

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

9:00 a.m.

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

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ACTION RECOMMENDED

1. Roll Call
2. Approval of Minutes - June 20, 2013 Approve
3. Public Comments - 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 give your copies to the Clerk of the Board.

Please **SILENCE** electronics
during the meeting

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Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.



CONSENT ITEMS

- | | | |
|-----|---|--------------------|
| 6. | <u>Unallocated Transportation Development Act Funds for Transit-Related Projects</u>
Action would approve the use of unallocated Transportation Development Act (TDA) funds currently held by the County of San Diego (County). These TDA funds would pay for the installation of communications equipment that would show trolley-arrival information on the City of Santee's Clock Tower display panels at the Santee Station. | Approve |
| 7. | <u>ARC of San Diego Interior Bus Cleaning - Sole-Source Contract Award</u>
Action would authorize the Chief Executive Officer (CEO) to: (1) execute MTS Doc. No. B0602.0-13 with the ARC of San Diego (ARC) for deep cleaning the interiors of San Diego Transit Corporation (SDTC) buses for a three-year base period with 2 one-year options for a total of five years; and (2) exercise each option year at the CEO's discretion. | Approve |
| 8. | <u>Audit Report - Business Process Review of Token Management Operations</u>
Action would receive an internal audit report on token management operations governed by San Diego Trolley, Inc. (SDTI) Revenue Management staff. | Receive |
| 9. | <u>Audit Report - Special Event Revenue Operations</u>
Action would receive an internal audit report on special event revenue operations governed by San Diego Trolley, Inc. (SDTI) Revenue Management staff. | |
| 10. | <u>Upgrade of Existing Heating, Ventilation, and Air-Conditioning System in Building A - Work Order</u>
Action would authorize the CEO to execute Work Order No. MTSJOC1431-06 with ABC Construction, Inc. (under MTS Doc. No. PWL135.0-12) for the installation of a new heating, ventilation, and air-conditioning system (HVAC) in Building A. | Approve |
| 11. | <u>Fiscal Year 2014 Internal Audit Plan</u>
Action would approve the MTS Internal Auditor's Audit Plan for fiscal year 2014. | Receive |
| 12. | <u>Increased Authorization for Legal Service Contracts to Pay Projected Expenses in FY 14</u>
Action would: (1) approve increasing the dollar amount of 12 legal services contracts to cover FY 14 expenses; and (2) ratify 2 legal services contract amendments with approved firms. | Approve/
Ratify |
| 13. | <u>Traction Power Substations for the San Diego Trolley, Inc. System - Contract Amendments</u>
Action would: (1) ratify Amendment Nos. 1-6 to MTS Document No. L1032.0-12 with Siemens Industry, Inc., which were previously approved under the CEO's approval authority; and (2) authorize the CEO to execute MTS Doc. No. L1032.7-12 with Siemens Industry, Inc. to increase the total contract spending authority to cover previously unknown site-access constraints and San Diego Gas and Electric's (SDG&E's) stricter passage requirements during installation. | Ratify/
Approve |
| 14. | <u>Monument Signs at Orange Line Stations - Approve Work Order</u>
Action would authorize the CEO to execute Work Order No. MTSJOC1431-05 with ABC Construction, Inc. (under MTS Doc. No. PWL135.0-12) for the installation of new monument signs at the 47th Street, Encanto/62nd Street, Euclid Avenue, Massachusetts Avenue, and Spring Street Stations on the Orange Line. | Approve |

CONSENT ITEMS - Continued

- | | | |
|-----|---|---------|
| 15. | <u>Taxicab Advisory Committee Election</u>
Action would approve the Taxicab Advisory Committee's (TAC's) recommendation to: (1) defer a decision about if and when to hold an election of TAC members until such time that either (a) the City of San Diego assumes administration of taxicab regulation in San Diego or (b) the City of San Diego requests an additional extension to the existing contract with MTS for taxicab administration; and (2) retain the current membership of the TAC into calendar year 2014 (assuming the current members are willing) pending a decision by the TAC on when to hold the next election. | Approve |
|-----|---|---------|

CLOSED SESSION

- | | | |
|-----|---|--------------------|
| 24. | a. CLOSED SESSION - CONFERENCE WITH REAL PROPERTY NEGOTIATORS Pursuant to California Government Code Section 54956.8; <u>Property</u> : 9805 and 9808 Prospect Avenue, Santee, CA 92071 (APNs 384-161-26-00 and 384-190-74-00); <u>Agency Negotiators</u> : Paul Jablonski, Chief Executive Officer; Karen Landers, General Counsel; and Tim Allison, Manager of Real Estate Assets; <u>Negotiating Parties</u> : City of Santee; <u>Under Negotiation</u> : Price and Terms of Payment | Possible
Action |
| | b. CLOSED SESSION - CONFERENCE WITH LEGAL COUNSEL EXISTING LITIGATION Pursuant to California Government Code Section 54956.9(a): <u>L. C. Douglas v. SDTC (WCAB Case Number SDO 0287607)</u> | Possible
Action |
| | c. CLOSED SESSION – CONFERENCE WITH LEGAL COUNSEL ANTICIPATED LITIGATION Pursuant to California Government Code Section 54956.9(b) (One <u>Potential Case</u>) | Possible
Action |

Oral Report of Final Actions Taken in Closed Session

NOTICED PUBLIC HEARINGS

- | | |
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| 25. | None. |
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DISCUSSION ITEMS

- | | |
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| 30. | None. |
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REPORT ITEMS

- | | | |
|-----|---|---------|
| 45. | <u>Customer Satisfaction Survey (2011 and 2013) (Rob Schupp)</u>
Action would receive a report for information. | Receive |
| 46. | <u>Student Pass Pilot Program (Sharon Cooney)</u>
Action would receive an update on the proposed pilot program to supply free or reduced fare transit passes to students in the San Diego Unified School District. | Receive |

- | | | |
|-----|---|-------------|
| 60. | <u>Chairman's Report</u> | Information |
| 61. | <u>Audit Oversight Committee Chairman's Report</u> | Information |
| 62. | <u>Chief Executive Officer's Report</u> | Information |
| 63. | <u>Board Member Communications</u> | |
| 64. | <u>Additional Public Comments Not on the Agenda</u>
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. | |
| 65. | <u>Next Meeting Date:</u> August 15, 2013 | |
| 66. | <u>Adjournment</u> | |



07-15-13 A07:22 IN

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Agenda

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CONSENT ITEMS

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Action |

Oral Report of Final Actions Taken in Closed Session

NOTICED PUBLIC HEARINGS

25. None.

DISCUSSION ITEMS

30. None.

REPORT ITEMS

- | | | |
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MEETING OF THE BOARD OF DIRECTORS FOR THE
METROPOLITAN TRANSIT SYSTEM (MTS)
AND
FINANCE WORKSHOP

1255 Imperial Avenue, Suite 1000
San Diego, CA 92101

June 20, 2013

MINUTES

BOARD MEETING

Bill Burke, Director of Security and Chief of Police introduced Bob Nowland of the U.S. Department of Homeland Security, Transportation Security Administration. Mr. Nowland presented MTS with the Gold Standard Award for achieving the highest standard of excellence in security pursuant to the Baseline Assessment for Security Enhancement (BASE) Program 2012.

1. Roll Call

Chairman Mathis called the Board meeting to order at 9:00 a.m. A roll call sheet listing Board member attendance is attached.

2. Approval of Minutes

Mr. Minto moved to approve the minutes of the May 16, 2013, MTS Board of Directors meeting. Ms. Bragg seconded the motion, and the vote was 12 to 0 in favor with Meses. Emerald, Zapf and Mr. Alvarez absent.

3. Public Comments

Warren Lambert – Mr. Lambert advised the MTS Board that he has taken action against MTS, MTS Access, First Transit and an executive he had to deal with individually at MTS. He believes that the paratransit community has been abused and accused MTS of bigotry. He discussed his grievances with MTS.

John L. Wood – Mr. Wood stated that the crossing gates at the depot went down 9 seconds after the trolley stops and he believes it is too fast. He asked when the depot improvements would be completed and when the arrival announcement sign would be installed. He discussed driving behind the 1909 bus and the diesel motor was emitting heavy smoke and particulates.

Miguel Aguirre – Mr. Aguirre manages the McDonald's building at the San Ysidro border crossing. He provided a handout which included a map and information regarding the MTS San Ysidro Intermodal Transit Center. He stated he does not agree with many of the changes and he has been given the run around. He explained differing plans and competition with private owners. He requested that MTS provide a copy of the plan so that a response can be drafted and a follow up meeting with MTS and Brice House so the community can have an opportunity to respond.

CONSENT ITEMS

6. Credit Agreement Resolution

Action would approve Resolution No. 13-16 authorizing the Chief Executive Officer (CEO) to execute an amendment(s) to the contract with JP Morgan Chase Bank N.A. (MTS Doc. No. G1413.0-12) and any other ancillary documents necessary to complete the transaction. The amendment would allow MTS to borrow up to \$40 million on its credit line.

7. Fiscal Year 2014 Transportation Development Act Claims

Action would adopt Resolution Nos. 13-13, 13-14, and 13-15 approving fiscal year (FY) 2014 Transportation Development Act (TDA) Article 4.0, 4.5, and 8.0 claims.

8. Investment Report - April 2013

Action would receive a report for information.

9. Orange/Green Lines Fiber-Optics Cable Project - Funds Transfer

Action would approve an amendment to Addendum No. 17 Project Scope of Work No. 11 authorizing the purchase of labor, materials, and supplies to install additional fiber-optic cables between the Grossmont Summit and Arnele Avenue Station on the MTS Trolley's Green Line.

10. Closed-Circuit Television (CCTV) System Project Amendment

Action would approve an amendment to Addendum 17 Project Scope of Work (MTS Doc. No. G0930.17-04.21.1) for the installation of additional CCTV cameras at Orange Line stations.

11. Work Order for Orange Line Print Verification Project

Action would authorize the CEO to execute an amendment to Work Order No. 13.01, Task Order 1 of MTS Doc. No. G1494.0-13.01.1 (general engineering contract with Pacific Railway Enterprises, Inc.) for additional services necessary to complete the updating of the existing signal drawings and for the installation of event recorders at crossings and interlockings on the Orange Line.

12. Federal Communications Commission-Mandated 800 MHz Band Reconfiguration - Consulting Services

Action would: (1) ratify MTS Doc. No. G1546.0-13 dated June 10, 2013, with Ross & Baruzzini for consulting services related to the Federal Communications Commission- (FCC)-mandated 800 MHz Band Reconfiguration, which was previously executed pursuant to the CEO's authority; and (2) authorize the CEO to execute MTS Doc. No. G1546.1-13 for the balance of funding for proposed consulting services detailed in Ross & Baruzzini's proposal.

13. Mills Building Improvement Project 2013

Action would authorize the CEO to authorize the San Diego Regional Building Authority (SDRBA), acting through its Mills Building Property Manager (Colliers International), to act as general contractor for the renovation of the 9th floor pursuant to an amendment to the Mills

Building Property Management Agreement (MTS Doc. No. G1233.1-09).

14. Taxicab Maximum Allowable City and Airport Rates of Fare - Stabilization of Rates for 2013

Action would approve Resolution No. 13-17 stabilizing the maximum allowable City of San Diego and airport rates of fare for the year 2013 at current rates.

Action on Consent Item 6 through 14

Mr. McClellan moved to approve Consent Items 6 through 14. Ms. Rios seconded the motion, and the vote was 13 to 0 in favor with Ms. Emerald and Mr. Alvarez absent.

The Board convened to Closed Session at 9:21 a.m.

CLOSED SESSION

24. a. CLOSED SESSION - CONFERENCE WITH LEGAL COUNSEL EXISTING LITIGATION Pursuant to California Government Code Section 54956.9(a): Margot Clines vs. MTS (San Diego Superior Court Case No. 37-2013-00031879-CU-PO-CTL)
- b. b. CLOSED SESSION - CONFERENCE WITH LEGAL COUNSEL Existing Litigation Pursuant to California Government Code Section 54956.9(a): Rodney Maxwell v. Metropolitan Transit System et al. (SDSC Case No. 37-2012-00101898-CU-PA-CTL; MTS Claim No. TS-27411)
- c. CLOSED SESSION - CONFERENCE WITH REAL PROPERTY NEGOTIATORS Pursuant to California Government Code Section 54956.8
Property: 1603 Main Street, San Diego, California (Assessor Parcel No. 538-210-25)
Agency Negotiators: Paul Jablonski, Chief Executive Officer; Karen Landers, General Counsel; and Tim Allison, Manager of Real Estate Assets
Negotiating Parties: Helf Investments, L.P.
Under Negotiation: Price and Terms of Payment

The Board reconvened to Open Session at 9:59 a.m.

Oral Report of Final Actions Taken in Closed Session

Karen Landers, General Counsel, reported the following:

- a. The Board approved a settlement in the amount of \$32K with a vote of 14-0 in favor with Councilman Alvarez absent.
- b. The Board received a report and gave instructions to legal counsel.
- c. The Board received a report and gave instructions to negotiators.

NOTICED PUBLIC HEARINGS

25. None

DISCUSSION ITEMS

30. Language Assistance Plan

Denis Desmond, Sr. Transportation Planner gave a presentation on the Language Assistance Plan ("LAP") and provided a four factor analysis and a chart on LEP speakers by language in MTS jurisdiction. He discussed the five components as required by law, current LEP outreach measures, potential future measures and provided a staff recommendation.

Mr. Ewin inquired about the different Chinese languages and the decision making process on how the specific language is chosen. Mr. Desmond advised the information is provided by the Census Bureau and they provide the specific categories.

Ms. Emerald stated there is software the City's website utilizes that will translate the website information into 60 different languages and asked if MTS has considered implementing this plug in. Mr. Desmond responded it is a Google plug in, but the FTA requires the language translations to be professionally translated, but this is something MTS is considering and working on at present time for possible future use.

Ms. Salas advised she was surprised by certain demographic sizes presented in the LEP speakers by language in the MTS jurisdiction chart. She said there are differences in census information. Mr. Desmond advised that there are two different pools of people and these pools distinguish between the language primarily spoken at home and English language proficiency. Ms. Salas asked if MTS includes this in their plan and Mr. Desmond responded that MTS does as they wish to outreach to both pools of people.

Action Taken

Ms. Emerald moved to approve the draft Language Assistance Plan as submitted to the Federal Transit Administration (FTA) as part of the Title VI Triennial Program Update. Mr. McClellan seconded the motion, and the vote was 14 to 0 in favor with Mr. Alvarez absent.

31. Title VI and Environmental Justice Policy No. 42 Updates

Mr. Desmond provided a presentation and discussed Title VI/environmental justice, the Policy 42 update and the three policies required by the FTA prompting the update including major service change, disparate impact and disproportionate burden. He provided an example of the 10% threshold for disparate impacts, discussed the outreach program, standards and provided a staff recommendation.

Mr. Mathis commented that there had been previous discussion that the 10% threshold was too low and after evaluation they found it was acceptable.

Mr. Gastil asked if there had been any surveys taken regarding transit stops at various locations and it is a concern there may be a disparity in quality of the vehicles at certain transit stops. Mr. Desmond responded there has been an internal survey regarding the top 100 stops and the auditors ride different routes in different areas of town looking at amenities and deficiencies which would show up in the Title VI report should such deficiencies exist. Sharon Cooney, Chief of Staff confirmed that this information is included in the Title VI update.

Action Taken

Mr. Ewin moved to approve the proposed Policy No. 42 amendments, including the Title VI policies and service standards. Mr. McClellan seconded the motion, and the vote was 13 to 0 in favor with Ms. Salas and Mr. Alvarez absent.

REPORT ITEMS

48. Pacific Imperial Railroad (PIR) Desert Line Agreement - Status Update (TAKEN OUT OF ORDER)

Karen Landers, General Counsel provided a status update on the Pacific Imperial Railroad ("PIR") Desert Line Agreement. She discussed the SD&AE property and provided a picture of the Goat Canyon Trestle looking south. She discussed the amended and restated Desert Line operating agreement, agreement terms, milestones achieved, work in progress and upcoming milestones.

Action Taken

Mr. McClellan moved to receive a report for information. Mr. Ovrom seconded the motion, and the vote was 13 to 0 in favor with Ms. Salas and Mr. Alvarez absent.

45. Virginia Avenue Intermodal Transportation Center

Ms. Cooney discussed the San Ysidro Land Port of Entry Reconfiguration. She provided maps and discussed the funding identified and the aggressive timeline for a new center at Virginia Avenue.

Mr. Alvarez asked if MTS is going to be part of the Memorandum of Understanding (MOU). Ms. Cooney responded the MOU will be put in place so the General Services Administration (GSA) has the right to build on the property that is owned by the City and it also allows the transfer of the funds from the FHWA and Caltrans to the project. MTS does not have any part in either of these transfers. Mr. Alvarez asked if this MOU is for the actual operations of the facility. Ms. Cooney stated what the MOU will identify, that it will not identify the operator, and that the City of San Diego will take possession of the property once construction is complete. Mr. Alvarez asked if there is interest from the City or MTS in designating this facility to MTS and if this would be something that could be worked out in the future as the region wishes to see buses in the region as there will be a lot of pedestrians entering and leaving the country so he would think there would be a substantial MTS customer base at the facility. Ms. Cooney stated it is being designed for MTS use, or MTS could drop off and pick up at the intersection as an alternative. One of the things MTS uses to fund its operations on the East side of San Ysidro Blvd. are the funds MTS receives from private carriers using MTS's property which has offset the cost of implementing security and providing cleaning services, but the City is not interested in allowing MTS to charge people to use the facility so without any provision such as this someone else would have to provide MTS with the funding to do such. Mr. Alvarez asked with regard to buses going in and out of the loop if MTS could stop at the location of Camino del Plaza which is not an ideal location, and if the buses will be able to enter the loop itself. Ms. Cooney stated MTS is allowed to enter any City right of way and use it for transit purposes so MTS could still use the facility or MTS could determine due to operational needs it is in MTS's best interest to stay out of the congestion that can be caused by all of the uses Virginia Avenue provides. It has not been designed yet so MTS will need to evaluate this need at a later date. Mr. Alvarez asked if it

needs to be designed with MTS in mind. Ms. Cooney agreed and stated that is why MTS is at the discussion table and there is a provision in the MOU that they will consult with MTS with regard to the design. Mr. Alvarez expressed his concerns over the project and was in hopes an agreement could be reached, but at the minimum there should be MTS accessibility as part of the discussion.

Action Taken

Mr. Alvarez moved to receive a report on regional efforts to establish an intermodal transportation center at a new pedestrian international border crossing to be located at Virginia Avenue and provide comments and direction. Mr. Gloria seconded the motion, and the vote was 13 to 0 in favor with Ms. Salas and Mr. McClellan absent.

46. Operations Budget Status Report for April 2013

Mike Thompson Finance Manager provided a fiscal year 2013 – April 2013 financial review including a combined MTS transit operators comparison to budget, total operating revenue less expenses and on-going concerns.

Action Taken

Ms. Emerald moved to receive the MTS operations budget status report for April 2013. Mr. Minto seconded the motion, and the vote was 13 to 0 in favor with Ms. Salas and Mr. McClellan absent.

47. Zero Emission Bus Requirements

Ms. Cooney provided a presentation on the Zero Emission Bus (ZEB) Program including the Zero Emission Bus regulation, challenges of implementation, and the California Air Resources Board (CARB).

Mr. Alvarez asked how many vehicles are purchased on an annual basis. Ms. Cooney advised it is in our Capital Improvement Program to purchase 50 a year. Mr. Alvarez asked if ZEB vehicles are available for purchase. Ms. Cooney advised they are not affordable at this time. Mr. Jablonski explained the mark up on these vehicles is approximately \$400K more than CNG vehicles. These vehicles require docking stations to charge and vehicle cost is approximately \$900K with the docking station costing approximately \$500K. The battery has not proven to have the range for transit utilization including power supply for amenities such as air conditioning. The lifespan is predicated on battery power with approximately 3 battery replacements over the lifetime of the bus which would cost approximately \$100K.

Mr. Alvarez inquired about the cost of Hydrogen buses. Mr. Jablonski responded hydrogen buses are close to \$2Million. Mr. Roberts stated the weight of the buses presents a problem as it violates the state laws as they are extremely heavy and the technology is not ready for current use, but there are current grants in process and a lot of interesting technology being developed at present time, but the reality is there are still too many limitations. Mr. Jablonski stated a number of years ago the choice was to stay on a diesel path or switch to an alternative fuel path. San Diego, unlike other regions in California, chose the alternative fuel path, but not without impact and an increase in cost. MTS chose CNG at a premium and had to implement CNG facilities with implementation approximately 80% complete. MTS is trying to stay on the path to get through its current commitment to CNG implementation as MTS made substantial

investment to move to CNG.

Ms. Emerald asked realistically how long MTS will utilize CNG technology before having to make adjustments to ZEB. Mr. Jablonski said MTS has to reach CARB standards every year and reports on a regular basis to reduce emissions through changes to the engine, etc. Mr. Roberts said programs will be phased in and it should not prevent us from using current buses and the playing field is changing dramatically, but he does not see rules dramatically changing MTS's requirements.

Action Taken

Mr. Ewin moved to receive a report for information. Ms. Zapf seconded the motion, and the vote was 13 to 0 in favor with Messrs. Roberts and Cunningham absent.

60. Chairman's Report

Mr. Mathis reported he, Mr. Jablonski and Wayne Terry, Chief Operating Officer of Rail had attended the LOSSAN meeting in Los Angeles on June 19, 2013. The focus of the meeting was the managing agency proposals and advised Mr. Jablonski's presentation was on point.

61. Audit Oversight Committee (AOC) Chairman's Report

Mr. Ewin advised the Audit Oversight Committee met Thursday, June 13th, 2013 and that the committee reviewed and discussed the Audit Engagement Letter, Interim Audit schedule and received an update from the internal auditor on future plans and results from the prior year and the RFP for auditing services. He stated he will report back to the Board as this process is finalized.

62. Chief Executive Officer's Report

(a) LOSSAN Managing Agency Proposals. Mr. Jablonski discussed the three agencies presenting to LOSSAN and their proposals to become the Managing Agency of LOSSAN. MTS put together the proposal in house which demonstrates the capability of MTS to be Managing Agency. He advised other transit agencies in the area hired outside consultants to assemble their LOSSAN proposal. (b) CHP Inspections. He stated that MTS is periodically inspected by CHP who takes a random group of buses and writes up inspections. MTS's Kearny Mesa facility was inspected the prior week and the CHP did not find any infractions. (c) Dump the Pump Day. MTS's Dump the Pump day was receiving extensive media coverage as there was media at four stations and a booth set up at Old Town to try and engage transit and potential transit customers.

63. Board Member Communications

There were no Board member communications.

64. Additional Public Comments on Items Not on the Agenda

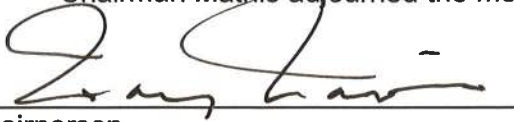
There were not additional public comments.

65. Next Meeting Date

The next regularly scheduled Board meeting is July 18, 2013.

66. Adjournment

Chairman Mathis adjourned the meeting at 11:16 a.m.



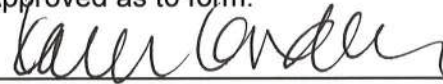
Chairperson
San Diego Metropolitan Transit System

Filed by:



Office of the Clerk of the Board
San Diego Metropolitan Transit System

Approved as to form:



Office of the General Counsel
San Diego Metropolitan Transit System

- Attachments:
1. Roll Call Sheet
 2. Transportation Security Administration Gold Standard Award
 3. MTS Letter to Warren Lambert
 4. Handout regarding map and information of San Ysidro Intermodal Transit Center
 5. Letter from Miguel Aguirre to Councilmember Alvarez re: 2003 San Ysidro SYITC & 2012-13 MTS-SYPS Opposition to second SYPS proposal to re-design Inter-City Terminal SYPS Plan presented June 11, 2013 at San Ysidro Border Transportation Council

METROPOLITAN TRANSIT SYSTEM
BOARD OF DIRECTORS
ROLL CALL

MEETING OF (DATE): June 20, 2013 CALL TO ORDER (TIME): 9:00 a.m.
 RECESS: N/A. RECONVENE: N/A
 CLOSED SESSION: 9:21 a.m. RECONVENE: 9:59 a.m.
 PUBLIC HEARING: N/A RECONVENE: N/A
 ORDINANCES ADOPTED: 42 (Revised) ADJOURN: 11:16 a.m.

BOARD MEMBER	(Alternate)	PRESENT (TIME ARRIVED)	ABSENT (TIME LEFT)
ALVAREZ	<input checked="" type="checkbox"/> (Faulconer) <input type="checkbox"/>	10:46 a.m.	11:16 a.m.
BRAGG	<input checked="" type="checkbox"/> (Bilbray) <input type="checkbox"/>	9:00 a.m.	11:16 a.m.
CUNNINGHAM	<input type="checkbox"/> (Mullin) <input checked="" type="checkbox"/>	9:00 a.m.	11:16 a.m.
EMERALD	<input checked="" type="checkbox"/> (Faulconer) <input type="checkbox"/>	9:28 a.m.	11:16 a.m.
EWIN	<input checked="" type="checkbox"/> (Arapostathis) <input type="checkbox"/>	9:00 a.m.	11:16 a.m.
GASTIL	<input checked="" type="checkbox"/> (Jones) <input type="checkbox"/>	9:00 a.m.	11:16 a.m.
GLORIA	<input checked="" type="checkbox"/> (Faulconer) <input type="checkbox"/>	9:00 a.m.	11:16 a.m.
MATHIS	<input checked="" type="checkbox"/>	9:00 a.m.	11:16 a.m.
MCCLELLAN	<input checked="" type="checkbox"/> (Ambrose) <input type="checkbox"/>	9:00 a.m.	11:16 a.m.
MINTO	<input checked="" type="checkbox"/> (McNelis) <input type="checkbox"/>	9:00 a.m.	11:16 a.m.
OVROM	<input checked="" type="checkbox"/> (Denny) <input type="checkbox"/>	9:00 a.m.	11:16 a.m.
RIOS	<input checked="" type="checkbox"/> (Sotelo-Solis) <input type="checkbox"/>	9:00 a.m.	11:16 a.m.
ROBERTS	<input checked="" type="checkbox"/> (Cox) <input type="checkbox"/>	9:02 a.m.	11:16 a.m.
SALAS	<input checked="" type="checkbox"/> (Ramirez) <input type="checkbox"/>	9:03 a.m.	10:13 a.m.
ZAPF	<input checked="" type="checkbox"/> (Faulconer) <input type="checkbox"/>	9:05 a.m.	11:16 a.m.

SIGNED BY THE CLERK OF THE BOARD: 

CONFIRMED BY THE GENERAL COUNSEL: 



**Transportation Security
Administration**

Gold Standard Award

Presented to

**San Diego Metropolitan Transit System
(MTS)**

For Achieving the Highest Standard of Excellence in Security

**BASELINE ASSESSMENT FOR SECURITY ENHANCEMENT (BASE) PROGRAM
2012**



Metropolitan Transit System

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June 19, 2013

Warren Lambert
(via email: Lambertwar@gmail.com)

Re: MTS Access Service to Scripps Green Hospital (10666 N. Torrey Pines Road)

Dear Mr. Lambert,

San Diego Metropolitan Transit System (MTS) has received your emails expressing your displeasure with the fact that MTS Access does not provide a direct trip to Scripps Green Hospital on Torrey Pines Road. While I understand your unhappiness that this trip cannot be made without a transfer, the MTS Access trip/route currently provided is compliant with federal regulations for Americans with Disabilities Act (ADA) Paratransit service.

Federal law requires that MTS provide paratransit service that is "comparable" to MTS's fixed route service. (49 CFR § 37.121.) Federal regulations define "comparable" to require that MTS provide paratransit service to all locations that are within ¾ mile from a fixed route stop. (49 CFR § 37.131.) In addition, the time for travel on paratransit service should also be comparable to the time it takes to travel on a fixed route trip. MTS's fixed route service is concentrated in the areas where demand is highest: urban areas near downtown San Diego, the south bay cities, and the east county corridor to Santee. Service is limited in the north county areas of MTS's jurisdiction. MTS does not currently have any fixed route stops within ¾ mile of the Scripps Green hospital complex. In addition, the boundary between MTS and North County Transit District (NCTD) jurisdictions along the coast is the San Diego/Del Mar border. NCTD has similar obligations under the ADA Paratransit rules. Because NCTD does have a fixed route bus that stops near Scripps Green hospital, this is a San Diego County destination that can be reached using paratransit services. The trip, however, requires a transfer from MTS Access to NCTD Lift. The designated transfer location for this trip is the Veteran's Administration hospital on La Jolla Village Drive.

We have reviewed the 5 trips you have taken on MTS Access and NCTD Lift to Scripps Green hospital. The average roundtrip travel time for these trips is 3 hours and 12 minutes. While that may be a long travel time, it is comparable to the time it would take to travel between the same locations (Island Avenue and N. Torrey Pines Road) on MTS and NCTD fixed routes – approximately 2 hours and 38 minutes with no delays (traveling from MTS Green Line trolley to MTS Route 150 to NCTD Route 101 plus walking time). Unfortunately, downtown to Scripps Green hospital is not an easy or quick trip using public transit.



Warren Lambert
June 19, 2013
Via Email

As MTS staff has previously communicated to you, the Sorrento Valley Coaster Connection service is exempt from the ADA regulation under the commuter bus section (49 CFR §37.3, and 49 CFR §37.121(c)). Therefore, the Sorrento Valley Coaster station is not an MTS fixed route stop that expands MTS's paratransit service area to include Scripps Green.

We understand your frustration with the lengthy travel times and transfers required to travel from your home to Scripps Green. This is a complicated trip for both MTS fixed route and MTS Access operations. Notwithstanding your personal frustration with this circumstance, our review has found no ADA violation. The trips scheduled have fully complied with Department of Transportation regulations and the ADA. It is possible that if the Mid-Coast trolley extension is approved and constructed, MTS may have a market for expanded fixed route operations in the vicinity of Scripps Green hospital and N. Torrey Pines Road. However, until our fixed route operations are expanded, MTS Access service in this area will be similarly limited, requiring a transfer to NCTD Lift.

Sincerely,

A handwritten signature in black ink, appearing to read "Paul C. Jablonski", enclosed within a large, loopy oval shape.

Paul C. Jablonski
Chief Executive Officer

cc: Dan McCaslin

A better mode of travel

Construction has started on the San Ysidro Intermodal Transportation Center, a project that promises to ease traffic and increase public safety north of the border. The \$18.4 million center should be finished in summer 2003.

2003: MTS SYITC PROJECT San Ysidro Intermodal Transit Center

BTC Instrumental Upper Terminal Design

(BTC) Border Transportation Council engaged in planning mtgs.

Vertical vs Parallel

Loading-Unloading on both sides of bus

Upper Inter-City Terminal

10 vs 4 Spaces

Original Plan:
4 parallel spaces

Community Supported
Including Greyhound

Regional & Local Stakeholder Input

Four (4) Year Planning, 1998-2002

- Police kiosk
- Info booth/tickets

Intermodal transit center CHANGES AT A GLANCE

- Pedestrian and vehicular traffic flows into and around the trolley station will be improved.
- Station overcrowding will be relieved since more area between trolleys will be created and a plaza will be built.
- Access to buses, taxis, jitneys and the trolley will be consolidated.
- New road will be built to give vehicles access to 700 block of East San Ysidro Boulevard and to a proposed intercity bus terminal.

MTS SYITC Project designed by Kimley, Horn & Associates in collaboration with Estrada Land Planning, affected property & business owners-end users of facility, BTC, San Ysidro Planning Group, Caltrans, City of San Diego & GSA.



June 18, 2013

Councilmember David Alvarez
City Council District 8
202 West C Street, 10th Floor
San Diego, CA 921

**Re: 2003 San Ysidro SYITC & 2012-13 MTS-SYPS
Opposition to second SYPS proposal to re-design Inter-City Terminal
SYPS Plan presented June 11, 2013 at San Ysidro Border Transportation Council**

Dear Councilmember Alvarez,

At the Border Transportation Council meeting last week, a revised terminal reconfiguration plan was presented by SYPS-MTS & Bricehouse-First America (Brad Saunders & Greyhound). The proposed revisions are a complete re-design of their first proposal. However, their 2nd proposal presents the same and new concerns for the use of public space and of those that must conduct their business at these facilities and our Bi-National Pedestrian POE(s).

The proposed changes continue to disregard impacted private property and challenges all visitors that must transit through this area. Speculatively speaking, MTS enforcement citations (an MTS revenue source) in San Ysidro, are most likely, the highest ticket issuance rate in all of San Diego. If these changes are implemented, it will continue to glaringly highlight the social injustice and inequity that persists in our community, a National Gateway into the USA.

1. Public Health:

Lack of Sheltered Facilities: Inter-City Terminal operations should not be run like a city bus stop. Weary travelers, laden with luggage, will have to sit/stand outdoors, suffering:

- exposure to poor air quality from idling bus and freight train diesel, as well as Port of Entry vehicle emissions drift containing high levels of ultrafine particulate matter and black carbon;
- exposure to harsh weather conditions, i.e. cold, rain, heat and swirling winds from cul-de-sac location.

2. Public Safety:

Two terminals decentralize Inter-City travel services: Inter-city travelers and service providers will be required to:

- increase walking distances (non ADA) and service provider traffic as facility users circulate between terminals;
- cause destination confusion and opportunity for illegal transportation solicitation to flourish;

3. Lack of environmental, social justice and equity: Proposed changes:

- removes beautiful mature 20-30' tall Palm Trees;

June 18, 2013

Re: San Ysidro, MTS-SYPS

Page two

- installs eight (8) tiny restrooms that will be abused, neglected and present an unpleasant image. These restrooms will become a target for drug use and other illicit activities;
- removes valuable infrastructure, i.e. inter-city bus and van parking;
- reconfigures and replaces inter-city parking and passenger platform areas with modular retail buildings.

4. 2003 San Ysidro Intermodal Transportation Center (SYITC): The 2003 City of San Diego-MTDB SYITC project involved 4-5 years of Regional Stakeholder & Community vetted planning. It involved the eminent domain taking of private property for public use. It successfully established “centralized” modes of transit infrastructure. Yet, for 8 years, MTS oversaw unsuccessful management operations of these facilities by ACE Parking Company.

Numerous attempts and proposals to improve management by community organizations and other qualified interests were ignored by MTS. The 2012 SYPS Agreement is full of conflicts of interests and represents an improper process disallowing community input and participation in proposed major changes to the vetted 2003 SYITC. MTS-SYPS proposes “de-centralization” and the privatization of public facilities on what was formerly private property, and will now, compete directly with these former property owners.

Councilmember Alvarez, there are numerous other related concerns we would like to discuss with you at your earliest opportunity. I have a call into your office that we may hopefully schedule a convenient time to meet before your next MTS Board meeting, June 20th.

Thank you and we look forward to your prompt response. I can be reached at (619) 917-3167.

Respectfully yours,

Miguel Aguirre

Copy: Mario Lopez, Mayor Bob Filner’s office
David Flores, Casa Familiar
Rogelio Gaytan, Tufesa Bus Operations
Richard Gomez, BTC
Jason Wells, Smart Border Coalition



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Agenda Item No. 6

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

UNALLOCATED TRANSPORTATION DEVELOPMENT ACT FUNDS FOR TRANSIT-RELATED PROJECTS

RECOMMENDATION:

That the Board of Directors approve the use of unallocated Transportation Development Act (TDA) funds currently held by the County of San Diego (County). These TDA funds would pay for the installation of communications equipment that would show trolley-arrival information on the City of Santee's Clock Tower display panels at the Santee Station.

Budget Impact

The use of unallocated TDA funds set aside by the County for transit-related projects in various jurisdictions would have no impact on MTS's operating or capital budgets. The total available unallocated TDA held for the benefit of the City of Santee would be reduced by \$10,000 resulting in a remaining balance of \$126,616 held by the County for future transit-related projects (pending MTS Board approval).

DISCUSSION:

On June 12, 2013, MTS received a request from the City of Santee for the use of \$10,000 of the City of Santee's portion of unallocated TDA held by the County for installation of communications equipment for the Clock Tower Project. This request would complete the Clock Tower Project and allow display of trolley-arrival information on the clock tower display panel at Santee Trolley Square. This project replaced the existing system that was installed in 2004 and has reached end-of-life status.

A handwritten signature in black ink, appearing to read 'Paul C. Jablonski', is written over a horizontal line.

Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com





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Agenda Item No. 7

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

ARC OF SAN DIEGO INTERIOR BUS CLEANING - SOLE-SOURCE CONTRACT
AWARD

RECOMMENDATION:

That the Board of Directors authorize the Chief Executive Officer (CEO) to:

1. execute MTS Doc. No. B0602.0-13 (in substantially the same format as Attachment A) with the ARC of San Diego (ARC) for deep cleaning the interiors of San Diego Transit Corporation (SDTC) buses for a three-year base period with 2 one-year options for a total of five years; and
2. exercise each option year at the CEO's discretion.

Budget Impact

The total amount would not exceed \$1,139,990.59. The MTS Bus Maintenance operating budget funds this project annually. MTS receives federal funds for preventative maintenance in the form of a grant, which is budgeted with 80% federal funds and 20% local funds of the total amount. The funds for this contract would be divided as follows: \$911,992.47 federal and \$227,998.12 local.

DISCUSSION:

Background

ARC is a not-for-profit organization providing services for the mentally disabled to promote personal, social, and economic independence. In 2005, the MTS Board of Directors awarded a one-year contract to ARC to deep clean SDTC buses on a trial basis. At that time, staff worked in conjunction with the International Brotherhood of Electrical Workers (IBEW) 465 union and signed an agreement to allow ARC members

to perform this work. This agreement made ARC workers honorary union members, which allowed them to perform this work without participating in the collective bargaining process. Since the initial trial period was deemed successful by staff as ARC demonstrated that its personnel could provide the level of performance required, a subsequent two-year contract was awarded. In 2008, staff awarded a five-year (3-year base plus 2 options) sole source-contract, and ARC has continued to provide a consistently high level of performance.

Conclusion

MTS Policy No. 52 governing procurement of services requires a competitive bid process for procurements exceeding \$100,000. In the event that the circumstances dictate other than the competitive bid process, a written statement by staff setting forth the reasons for not pursuing all or part of any of the processes is required. The Collective Bargaining Agreements (CBA) for the IBEW prohibits nonunion employers from performing the work outlined in the attached contract. Therefore, the only way to contract this work is to negotiate union membership with IBEW, which therefore qualifies as a sole-source contract.

If this work was to be performed in house, the average fully encumbered hourly union wage would be \$24.69. The total hours of work assigned, in the ARC contract is 25,480 per year. Employing MTS personnel to do this work would cost \$629,101 for one year; conversely the ARC contract itself is only \$214,897 for the first year. Therefore, staff estimates an annual savings of \$414,204 by contracting the work out (refer to Attachment B – Cost Analysis).

Staff is very satisfied with ARC's performance, and the costs have remained fair and reasonable. In addition, the socioeconomic benefit of a contract with ARC provides a win-win situation for both MTS and ARC.

Therefore, staff is requesting that the MTS Board of Directors authorize the CEO to:

1. execute MTS Doc. No. B0602.0-13 (in substantially the same format as Attachment A) with ARC for deep cleaning the interiors of SDTC buses for a three-year base period with 2 one-year options for a total of five years; and
2. exercise each option year at the CEO's discretion.



Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com

Attachments: A. Draft MTS Doc. B0602.0-13
B. Cost Analysis

DRAFT

STANDARD SERVICES AGREEMENT

B0602.0-13
 CONTRACT NUMBER
 OPS 960.6
 FILE NUMBER(S)

THIS AGREEMENT is entered into this _____ day of _____ 2014, in the State of California by and between San Diego Metropolitan Transit System ("MTS"), a California public agency, and the following, hereinafter referred to as "Contractor":

Name: The ARC of San Diego Address: 3030 Market Street

Form of Business: Non-Profit Organization San Diego, CA 92102
 (Corporation, partnership, sole proprietor, etc.)

Telephone: 619-685-1175

Authorized person to sign contracts: Anthony De Salis Chief Operations Officer
 Name Title

The attached Standard Conditions are part of this agreement. The Contractor agrees to furnish to MTS services, as follows:

Provide deep cleaning and detailing of the interior of buses for MTS Bus Division [also known as San Diego Transit Corporation (SDTC)] as set forth in the MTS Scope of Work, ARC's Proposal letter, in accordance with the Standard Services Agreement, including Standard Conditions Services, Federal Requirements, and SDTC Safety Department SOP (SAF 016-03).

This contract is for up to a five (5) year period (3-year base with two 1-year options, exercisable at MTS's sole discretion). Base period shall be effective April 1, 2014, through March 31, 2017. Option Years shall be effective from April 1, 2017, through March 31, 2019.

MTS shall pay ARC a "lump sum" per month as reimbursement for all costs incurred in the performance of the contract, including all wages, fees, and overhead. ARC shall compensate each Employee at an hourly rate (prevailing wage subject to adjustment). Employees' wages shall be based upon six (6) hours per day, five (5) days per week. Job Coaches' compensation shall be based upon 6.5 hours per day, five (5) days per week. The hourly compensation MTS pays ARC for employees and the Job Coaches wages include all benefits, payroll taxes and services, workers' compensation, liability insurance, and all overhead costs.

From April 1, 2014, to March 31, 2015, MTS shall pay ARC \$17,658.09 per month for both divisions (IAD/KMD). This amount does not include union dues paid directly to IBEW by MTS and nonmonetary incentives. The monthly amount for Years 2 & 3 of the contract shall be escalated by 3% each year. Option Year 1 (Year 4) and Option Year 2 (Year 5) shall also increase by 3% each year as reflected below:

Description	Base Year 1	Base Year 2	Base Year 3	Option Yr. I (Year 4)	Option Yr. II (Year 5)
Monthly Cost per Division (IAD/KMD)	\$ 8,829.05	\$ 9,093.92	\$ 9,366.74	\$ 9,647.74	\$ 9,937.17
Total Monthly Cost (Both Divisions)	\$ 17,658.09	\$ 18,187.84	\$ 18,733.47	\$ 19,295.48	\$ 19,874.34
Annual Costs – Deep Clean	\$211,897.12	\$218,254.03	\$224,801.66	\$231,545.71	\$238,492.08
Annual Cost – Lunch	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00	\$ 3,000.00
TOTAL ANNUAL COST	\$214,897.12	\$221,254.03	\$227,801.66	\$234,545.71	\$241,492.08

MTS shall compensate ARC for the observed holidays listed below (to be consistent with MTS maintenance employees working on the property):

- New Year's Day
- Presidents Day
- Martin Luther King Jr. Day or Cesar Chavez Day (one or the other)
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving
- Christmas

Total contract amount shall not exceed \$663,952.81 without written approval from MTS.

SAN DIEGO METROPOLITAN TRANSIT SYSTEM	CONTRACTOR AUTHORIZATION
<p>By: _____ <div style="text-align: center;">Chief Executive Officer</div> </p> <p>Approved as to form:</p> <p>By: _____ <div style="text-align: center;">Office of General Counsel</div> </p>	<p>Firm: _____</p> <p>By: _____ <div style="text-align: center;">Signature</div> </p> <p>Title: _____</p>

AMOUNT ENCUMBERED	BUDGET ITEM	FISCAL YEAR
<u>\$663,952.81 (Base period)</u>	<u>312 / 322-53615</u>	<u>FY14-17</u>

By: _____

Chief Financial Officer
Date

(___ total pages, each bearing contract number)

**INTERIOR BUS CLEANING
MTS DOC. NO. B0602.0-13**

A. Breakdown of teams and hourly rates

EMPLOYEE DESCRIPTION	NO. OF EMPLOYEES	HOURS PER DAY	DAYS PER WEEK	WEEKS PER YEAR	TOTAL HOURS PER YEAR
Consumer *	12	6	5	52	18720
Job Coach **	4	6.5	5	52	6760
					25480

Total of 4 Teams:	<u>1 Team:</u>	<u>Total</u>
IAD = 2 teams	* 3 Consumers	12
KMD = 2 teams	** 1 Job Coach	4

IN-HOUSE ESTIMATE IF WORK IS DONE BY MTS BUS EMPLOYEES	
Hourly wage (full rate w/ fringe benefits) - Servicer B (SDTC)	\$ 24.69
Total hours/year - ARC Contract	25480
Annual Cost to MTS *	\$ 629,101.20
Year One Cost - ARC Contract **	\$ 214,897.12
Cost Savings to MTS - Year 1	\$ 414,204.08

Description	In-House Cost to MTS *	ARC of San Diego **
Interior Bus Cleaning per MTS Scope of Work - Monthly cost	\$52,425.10	\$ 17,908.09
Total Cost - Year 1	\$629,101.20	\$ 214,897.12

B. Cost Comparison and Productivity

The table below reflects a comparison of cost and productivity information from ARC and Calderon based on an annual CPI increase of 3% from 2005 through 2013. ARC's productivity is 33% higher with more buses cleaned per day.

The table also shows that the ARC's proposal is priced competitively and is more productive than those in comparison, and supports a staff determination that the cost from ARC is fair and reasonable.

Year	Calderon - Interior Bus Cleaning	ARC	Difference (\$)	Difference (%)
	2 buses/day	3-6 buses/day	Dollars	Percent
2005	\$ 200.00	\$ 135.00	\$ 65.00	33%
2006	\$ 206.00	\$ 139.05	\$ 66.95	33%
2007	\$ 212.18	\$ 143.22	\$ 68.96	33%
2008	\$ 218.55	\$ 147.52	\$ 71.03	33%
2009	\$ 225.10	\$ 151.94	\$ 73.16	33%
2010	\$ 231.85	\$ 156.50	\$ 75.35	33%
2011	\$ 238.81	\$ 161.20	\$ 77.61	33%
2012	\$ 245.97	\$ 166.03	\$ 79.94	33%
2013	\$ 253.35	\$ 171.01	\$ 82.34	33%



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Agenda Item No. 8

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

AUDIT REPORT – BUSINESS PROCESS REVIEW OF TOKEN MANAGEMENT
OPERATIONS

RECOMMENDATION:

That the Board of Directors receive an internal audit report on token management operations governed by San Diego Trolley, Inc. (SDTI) Revenue Management staff.

Budget Impact

None.

DISCUSSION:

The MTS Internal Auditor completed a review on token management operations governed by SDTI Revenue Management staff. Based on evidence analyzed, there were no significant risks or reportable findings identified requiring management's attention as a result of the review.



Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com

Attachment: A. Audit Report – SDTI Token Management Operations



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Att. A, AI 8, 7/18/13

Memorandum

DATE: 5/20/2013
TO: Scott Donnell
FROM: Daniel Madzellan
SUBJECT: Business Process Review – Token Management Operations

EXECUTIVE SUMMARY:

Background:

On January 17, 2013 MTS took control over all administrative, warehousing and distribution responsibilities for the universal token fare media product from SANDAG. Universal tokens are sold to passengers at the Transit Store. Tokens are accepted as one bus fare and cannot be used to purchase a Day Pass. Tokens are also accepted at Trolley ticket vending machines. Each token has a \$2.50 value and can be used towards the purchase of all tickets and passes. If cash is used to cover the difference for a one-way ticket or Day Pass, change will be given; if tokens are only used, change will not be given. Finally, tokens are accepted for one fare on NCTD BREEZE buses.

Audit Objectives and Scope:

The objectives of the process review were to provide an independent evaluation of the internal control environment governing token operations, focusing on:

1. Assessing the key business risks associated with token operations;
2. Evaluating the adequacy of the new internal controls in achieving goals and objectives of token operations;
3. Evaluating the efficiency and effectiveness of new standard operating procedures;
4. Verify compliance with new internal controls/standard operating procedures; and
5. Assessing if any residual risks remaining were at acceptable levels.

The scope of the audit focused on the following:

1. Security of token inventory while stored in SDTI Revenue Facilities.
2. Recording and processing tokens returned to SDTI revenue facilities from all MTS operating division (SDTI, SDTC, Contracted Services, and NCTD).
3. Recording and distributing tokens to the Transit Store for sale to customers.
4. Month end reconciliation procedures.
5. Reporting, monitoring and analysis of token utilization by SDTI Revenue Management.



The time period reviewed included all transactional activities since MTS took control of the operations through the April month end reconciliation, or roughly four months of activity.

Audit Results:

There were no reportable findings based on evidence reviewed testing performed. The following is a brief summary of the process and procedures reviewed:

- Audit reviewed the standard operating procedures (SOP 101.081 – Regional Token Reconciliation) and did not identify any significant gaps or weaknesses in the design of the internal controls. Audit also reviewed the documentation used to record receiving and disbursement activities, as well as the inventory tracking log. Likewise Audit did not identify any significant gaps or weakness in the design of the primary forms for recording transactions.
- Audit physically observed the process of collection and storage of tokens within the SDTI Revenue Facilities. All movement of tokens, both into and out of, the facility is monitored by security cameras, which are routinely reviewed. Tokens are stored in a secured location within the SDTI count room, which is restricted to authorized personnel and requires badge access for entry. As such, Audit concluded the risk of unauthorized movement or potential theft of the tokens as low.
- Audit, under the supervision of Scott Donnell, SDTI Revenue Manager, performed an unannounced physical count of the token inventory on April 4, 2013. Audit obtained a copy of the token inventory log sheet noting the reported balance on hand. Audit and Revenue Manager had the Revenue Supervisor go into the secured area of the count room and retrieve tokens physically on site. The reported balance of tokens on hand documented within the inventory log agreed with the actual balance on hand without exception.
- Audit reviewed all receiving transactions processed by SDTI Revenue by other MTS operating divisions, total of forty-one (41) transactions for compliance with SOP 101.081 – Regional Token Reconciliation. Based on documentary evidence provided, Audit found no evidence of non-compliance with the SOP. Accordingly, Audit concluded all receiving transaction were properly initiated, processed, recorded, and reported in accordance with stated procedures.
- Audit reviewed all disbursement transactions processed by SDTI Revenue and delivered to the Transit Store for sale, total of eleven (11) transactions, for compliance with SOP 101.081 – Regional Token Reconciliation. Based on documentary evidence provided, Audit found no evidence of non-compliance with the SOP. Accordingly, Audit concluded all receiving transaction were properly initiated, processed, recorded, and reported in accordance with stated procedures.
- Audit reviewed all month end reconciliation packages, as well as Management's token utilization monitoring report. All month end reconciliations totals values agreed to transactional supporting details without exception. Audit determined Management's utilization monitoring report as effective and efficient, as report provides Management sufficient and relevant information for properly managing token operations.

Report Distribution:

Paul Jablonski, Cliff Telfer, and Karen Landers – MTS
Wayne Terry – SDTI



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San Diego, CA 92101-7490
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Agenda Item No. 9

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

AUDIT REPORT – SPECIAL EVENT REVENUE OPERATIONS

RECOMMENDATION:

That the Board of Directors receive an internal audit report on special event revenue operations governed by San Diego Trolley, Inc. (SDTI) Revenue Management staff.

Budget Impact

None.

DISCUSSION:

The MTS Internal Auditor completed a review on special event revenue operations governed by SDTI Revenue Management staff. Evidence reviewed determined that corrective actions taken subsequent to two loss events during fiscal year 2012 were implemented, and overall controls were operating as designed and intended. There were no significant reportable findings requiring management's attention as a result of this review.

A handwritten signature in black ink, appearing to read 'Paul C. Jablonski', is written over a horizontal line.

Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com

Attachment: A. Audit Report – Special Event Revenue Operations

1255 Imperial Avenue, Suite 1000, San Diego, CA 92101-7490 • (619) 231-1466 • www.sdmts.com

Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.



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Att. A, AI 9, 7/18/13

Memorandum

DATE: 5/9/2013
TO: Scott Donnell
FROM: Daniel Madzellan
SUBJECT: Audit Report - SDTI Revenue Special Event Operations

EXECUTIVE SUMMARY:

Audit Background:

Internal Audit completed a review of SDTI Revenue Department during FY2012, which included reviewing procedures governing special event operations. Prior to issuing a formal report, there were two loss events within special event operations. The first loss event occurred on December 28, 2011 during the setup process for the Holiday Bowl at the Mission Valley Transit Center. The second loss event was discovered on January 21, 2012 during the setup process for the Monster Jam Trucks event at Qualcomm Stadium.

SDTI Revenue Management conducted an internal investigation. MTS Security, along with Audit, conducted a separate investigation into the events. These investigations resulted in the implementation of several corrective actions designed to prevent future loss events during special events.

Audit Objectives and Scope

The objectives of the review were to:

1. Verify the corrective action plans were implemented,
2. Corrective action plans were working as designed and intended (effectiveness and efficiency),
3. Evaluate if residual risks remaining are at acceptable levels.

The scope of the audit included the following:

1. Reviewing revenue vehicles used during special events for security upgrades.
2. Evaluating compliance with SOP 101.041: Special Event Ticket Booths and Trailers. New SOP implemented on March 13, 2012, addressing the contents allowed within ticket booths and trailers, as well as monitoring of compliance with operating procedures.
3. Assessing prior year costs to current year costs to evaluate impact of procedural changes on overall expenses related to ongoing operations.
4. Evaluating special events from FY12 and FY13 for compliance with SOP 101.061: Special Event Set-Up & Close Down Procedures and SOP 101.063: Post Event Revenue Receipts Log-In. SOPs were implemented on March 1, 2012.



Audit Results:

Overall, there were no reportable findings. The following is a brief summary of the four areas reviewed:

- Audit inspected revenue vehicles, verifying management implemented the security upgrades to these vehicles as stated in their corrective action plans. Accordingly, Audit concluded action plans implemented were working as designed and intended and any residual risks were at acceptable levels.
- Audit physically observed ticket kiosks along the Green Line under the supervision of Revenue Supervisor. Observations of kiosks revealed full compliance with SOP 101.041: Special Event Ticket Booths and Trailers. Audit concluded action plans implemented were working as designed and intended and any residual risks were at acceptable levels.
- Using MTS budget reporting, Audit reviewed costs corresponding to special event security, as the changes in operating procedures would primarily impact these costs. Budgeted costs for special event security for FY13 projected a 3% increase from FY12 actual costs. As of the date of this report, actual costs for FY13 were tracking below projected costs. Based on available evidence, Audit concluded changes in operating procedures were having minimal impact to overall operating costs of special event activities.
- Audit reviewed eight (8) special event files for evidence of completeness and compliance with SOP 101.061: Special Event Set-Up & Close Down Procedures and SOP 101.063: Post Event Revenue Receipts Log-In. Seven of the eight reviewed were fully compliant with operating procedures, or an 88% compliance rate.

There was one file where one of the new required documents (activity log) was missing a signature of the Lead Sales Agent (LSA), as well as the time field indicating when the ticket revenue packets were returned to the revenue facilities. Audit communicated this observation to management, but based on all the other evidence considered this is minor omission.

Report Distribution:

Paul Jablonski, Cliff Telfer, and Karen Landers – MTS
Wayne Terry – SDTI



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Agenda Item No. 10

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

UPGRADE OF EXISTING HEATING, VENTILATION, AND AIR-CONDITIONING
SYSTEM IN BUILDING A - WORK ORDER

RECOMMENDATION:

That the Board of Directors authorize the Chief Executive Officer (CEO) to execute Work Order No. MTSJOC1431-06 (in substantially the same format as Attachment A) with ABC Construction, Inc. (under MTS Doc. No. PWL135.0-12) for the installation of a new heating, ventilation, and air-conditioning system (HVAC) in Building A.

Budget Impact

The total direct cost of this project would not exceed \$250,321.03 and would be funded under FY 2013/2014 Capital Improvement Project (CIP) 11301-1000 (Building A A/C & Heating). As the project would be under a San Diego Association of Governments (SANDAG) Job Order Contract, a 6.75% payment of \$16,896.67 for administrative costs would apply. Thus, the total amount for this JOC work order would not exceed \$267,217.70.

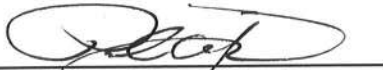
DISCUSSION:

This project is for the purchase and installation of a new HVAC system in MTS's Building A (located at 12 S. 13th Street). The work would include installation of one 7.5-ton and one 15-ton gas/electric HVAC unit along with new duct work, cleaning of existing ducting, regulators, thermostat, concrete pads, gas main piping, and wall restoration for duct penetrations. The central HVAC system has been inoperable for the past ten years. There are eight offices, two restrooms, two locker rooms, two training rooms, one train operator lounge, and the assignments office that would be affected. Over 100 employees use this facility in different capacities in any given 24-hour period, and 14 full-time employees are housed there during their work shifts.



These spaces are particularly uncomfortable during winter and summer months. Currently, window-mounted air conditioners and electric space heaters are in place to regulate the temperature, but the results have been marginal.

Therefore, staff recommends that the Board of Directors authorize the CEO to execute Work Order No. MTSJOC1431-06 (in substantially the same format as Attachment A) with ABC Construction, Inc. (under MTS Doc No. PWL135.0-12) for the installation of a new HVAC system in Building A.



Paul G. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com

Attachment: A. Draft MTSJOC1431-06 & Contractor Cost Proposal



1255 Imperial Avenue, Suite 1000
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JOB ORDER CONTRACT
WORK ORDER

PWL135.0-12
CONTRACT NUMBER

MTSJOC1431-06
WORK ORDER NUMBER

THIS AGREEMENT is entered into this _____ day of _____, 2013, in the state of California by and between San Diego Metropolitan Transit System ("MTS"), a California public agency, and the following, hereinafter referred to as "Contractor":

Name: ABC Construction, Inc. Address: 320 National Avenue

Form of Business: Corporation San Diego CA 92113
(Corporation, partnership, sole proprietor, etc.)

Telephone: (619) 239-3428

Authorized person to sign contracts: Wayne Czubernat Project Manager
Name Title

Pursuant to the existing Job Order Contract (MTS Doc. No. PWL135.0-12), MTS issues a Work Order to Contractor to complete the detailed Scope of Work (attached as Exhibit A.), the Cost Breakdown for the Scope of Work (attached as Exhibit B.), and the subcontractor listing form applicable to this Work Order (attached as Exhibit C.)

TOTAL AMOUNT OF WORK ORDER SHALL NOT EXCEED \$ 250,321.03

SAN DIEGO METROPOLITAN TRANSIT SYSTEM	CONTRACTOR AUTHORIZATION
By: _____ Chief Executive Officer	Firm: _____
Approved as to form:	By: _____ Signature
By: _____ Office of General Counsel	Title: _____

AMOUNT ENCUMBERED	BUDGET ITEM	FISCAL YEAR
<u>\$ 250,321.03</u>	<u>113001-1000</u>	<u>2013</u>

By: _____ Date _____
Chief Financial Officer

(_____ total pages, each bearing contract number and work order number)



Contractor Cost Proposal - CSI-Detail

Job Order Contract

Date : 04/04/2013

Basic Project Information

Job Order Number: MTSJOC1431-06
Job Order Name: Building A HVAC Upgrade

Sect.	Item	Mod.	UOM	Description	Line Total
Section 01-General Requirements					
01352	0039		HR	LaborerNote: Tasks in the CTC include appropriate costs to cover labor. These tasks will be requested specifically by the owner for miscellaneous work not covered in the CTC.	8,375.33
			Quantity	Unit Price	Factor
			Installation	160.00 x 56.91 x	0.9198 =
			Supervision		

Subtotal for 01-General Requirements 8,375.33

Section 13-Special Construction

13000	0005		LS	HVAC Upgrades	188,743.50
			Quantity	Unit Price	Factor
			Installation	1.00 x 188,743.50 x	1.0000 =
			NPP Task		
13000	0006		LS	Building Upgrades	53,202.20
			Quantity	Unit Price	Factor
			Installation	1.00 x 53,202.20 x	1.0000 =
			NPP Task		

Subtotal for 13-Special Construction 241,945.70

Proposal Total

250,321.03

The work order proposal total represents the correct total for the proposal. Any discrepancy between line totals, sub-totals and the proposal total is due to rounding of the line totals and sub-totals.



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Agenda Item No. 11

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

FISCAL YEAR 2014 INTERNAL AUDIT PLAN

RECOMMENDATION:

That the Board of Directors approve the MTS Internal Auditor's Audit Plan for fiscal year 2014.

Budget Impact

None.

DISCUSSION:

The MTS Internal Auditor prepared an audit plan consisting of 4 internal audits, 2 consultative reviews, performance of internally developed continuous monitoring program, and follow-up reviews of FY 12/FY 13 projects. The plan allocated 240 hours for audit administration and 160 hours for management requests/budget overruns. The operations, business unit, type of audit, risk profile, and estimated time to complete are shown within the audit plan. Projects were selected based on:

- Internal Audit's Risk Assessment
- Management Interviews/Recommendations
- Audit Universe Coverage

A handwritten signature in black ink, appearing to read 'Paul C. Jablonski', is written over a horizontal line.

Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com

Attachment: A. FY 14 Internal Audit Plan

Operation	Primary Business Unit	Audit Type	Risk Impact Profile	Risk Likelihood Profile	Estimated Hours
Compass Card Operations - Transition Support & Reviews	Marketing/Finance	Consultative/Business Process Review	High	Probable	320.00
Continuous Monitoring Program	Finance/Accounting/Rev. Mgmt	Operational/Assurance	High	Possible	280.00
Contract Compliance/Admin - General Operations	Procurement	Consultative/Assurance	High	Probable	200.00
Security - Training Program Mgmt.	Security	Assurance / Operational (Effective/Efficient)	High	Possible	160.00
Risk and Claims - Liability Operations	Legal	Operational (Effective/Efficient)	High	Possible	124.00
Grants Administration	Finance/Accounting	Operational (Effective/Efficient)	High	Possible	124.00
IT - Business Continuity/Disaster Recovery	IT/Finance	Operational (Effective/Efficient)	High	Possible	100.00
Follow Ups Reviews	Multiple Business Units	Follow Up/Assurance	Medium	Possible	84.00
Total Estimated Hours - Scheduled Audits					1,392.00
Hours - Audit Administration					240.00
Unscheduled Projects/Management Requests/Budget Overruns					160.00
TOTAL AUDIT HOURS					1,792.00
TOTAL AVAILABLE BUDGET HOURS					1,792.00
DIFFERENCE					-



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Agenda Item No. 12

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

INCREASED AUTHORIZATION FOR LEGAL SERVICE CONTRACTS TO PAY
PROJECTED EXPENSES IN FY 14

RECOMMENDATION:

That the Board of Directors: (1) approve increasing the dollar amount of 12 legal services contracts to cover FY 14 expenses; and (2) ratify 2 legal services contract amendments with approved firms.

Budget Impact

Sufficient funding has been programmed in the current operating and capital budgets to pay these expenses. Each law firm's contract must be amended to authorize the FY 14 spending.

DISCUSSION:

Pursuant to Board Policy No. 52 (Procurement of Goods and 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.

On December 8, 2011, the Board established a panel of qualified law firms to assist the Metropolitan Transit System (MTS), San Diego Trolley, Inc. (SDTI) and San Diego Transit Corporation (SDTC) with various legal matters on an as-needed basis. Thereafter, MTS began contracting with 17 of the approved firms for designated amounts. The firms provide different specialties of law, such as tort liability, workers' compensation, employment practices, real estate, environmental, etc. Twelve of these firms will require contract increases to pay current and anticipated legal expenses in FY 2014. Rather than come to the Board individually with each firm when the contract allowance runs low, staff recommends seeking Board approval hereafter on an annual basis at the start of each fiscal year.

The contract increases are based upon each firm's current caseload, the likelihood that a particular case may go to trial, and anticipated future litigation assigned to these firms in the current fiscal year. The following table includes the contracts needing Board approval to increase the dollar amount for legal services contracts for fiscal year 2014:

#	Firm Name	Contract/ Amendment No.	Current Contract Amount	Proposed Increase Amount	Total Contract Amount	Attachment
1	Best Best & Krieger	G1422.1-12	\$135,000	\$175,000	\$310,000	A
2	David C. Skyer, APC	G1423.2-12	\$270,000	\$170,000	\$440,000	B
3	Liebman, Quigley, Sheppard and Soulema APLC	G1425.2-12	\$140,000	\$55,000	\$195,000	C
4	Mark H. Barber (Law Offices of)	G1426.2-12	\$165,000*	\$120,000	\$285,000	D
5	Michael E. Ripley	G1428.2-12	\$230,000	\$90,000	\$320,000	E
6	Paul, Plevin, Sullivan & Connaughton, LLP	G1430.2-12	\$220,000*	\$150,000	\$370,000	F
7	Ryan Mercaldo, LLP	G1432.2-12	\$180,000	\$180,000	\$360,000	G
8	Trovillion, Inveiss & Demakis, APC	G1433.3-12	\$125,000	\$100,000	\$225,000	H
9	Wheatley Bingham & Baker, LLP	G1434.1-12	\$315,000	\$325,000	\$640,000	I
10	Laughlin, Falbo, Levy & Moresi, LLP	G1455.1-12	\$50,000	\$60,000	\$110,000	J
11	Liedle, Lounsbery, Larson & Lidl, LLP	G1490.1-13	\$50,000	\$100,000	\$150,000	K
12	Manning & Kass, Ellrod, Ramirez, Trester, LLP	G1491.1-13	\$50,000	\$35,000	\$85,000	L
Totals			\$1,930,000	\$1,560,000	\$3,490,000	

*Reflects the total contract value, including FY 13 increases described in the chart below.

Today's action would also ratify increases to 2 legal services contracts authorized by the CEO in FY 13. The following table includes the 2 legal services contracts needing Board ratification for current and future legal expenses through fiscal year 2014.

#	Firm Name	Contract/ Amendment No.	Original Contract Amount	Amended Amount	Current Contract Amount	Attachment
1	Mark H. Barber (Law Offices of)	G1426.1-12	\$140,000	\$25,000	\$165,000	M
2	Paul, Plevin, Sullivan & Connaughton, LLP	G1430.1-12	\$200,000	\$20,000	\$220,000	N

CONCLUSION:

Staff is requesting that the Board of Directors: (1) approve increasing the dollar amount of 12 legal services contracts; and (2) ratify 2 legal services contracts with approved firms for current and future legal expenses through fiscal year 2014.



Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com

Attachments: A. Draft MTS Doc. No. G1422.1-12
B. Draft MTS Doc. No. G1423.3-12
C. Draft MTS Doc. No. G1425.2-12
D. Draft MTS Doc. No. G1426.2-12
E. Draft MTS Doc. No. G1428.2-12
F. Draft MTS Doc. No. G1430.2-12
G. Draft MTS Doc. No. G1432.2-12
H. Draft MTS Doc. No. G1433.3-12
I. Draft MTS Doc. No. G1434.1-12
J. Draft MTS Doc. No. G1455.1-12
K. Draft MTS Doc. No. G1490.1-13
L. Draft MTS Doc. No. G1491.1-13
M. MTS Doc. No. G1426.1-12
N. MTS Doc. No. G1430.1-12

Board Only Due to Volume

DRAFT

July 18, 2013

MTS Doc. No. G1422.1-12
LEG 491 (PC 50633)

Best Best & Krieger, LLP
Mr. Bruce W. Beach
Equity Partner
655 West Broadway, 15th Floor
San Diego, CA 92101

Dear Mr. Beach:

Subject: AMENDMENT NO. 1 TO MTS DOC. NO. G1422.0-12; LEGAL SERVICES – ALL AREAS
OF MTS OPERATION

This shall serve as Amendment No. 1 to our agreement for the legal services as further described below.

SCOPE

Continue to provide general legal advice and services for all areas of MTS operation in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1422.0-12.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$175,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$310,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Bruce W. Beach
Best Best & Krieger, LLP

JULY2013.G1422.1-12.BBK.doc

Date: _____

Cc: K. Landers, S. Lockwood, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1423.2-12
LEG 491 (PC 50633)

David C. Skyer, APC
Mr. David C. Skyer
Attorney
401 West A Street, Suite 1740
San Diego, CA 92101-7994

Dear Mr. Skyer:

Subject: AMENDMENT NO. 2 TO MTS DOC. NO. G1423.0-12; LEGAL SERVICES – GENERAL
AND TORT LIABILITY

This shall serve as Amendment No. 2 to our agreement for the legal services as further described below.

STATEMENT OF WORK

Ccontinue to represent and defend MTS, SDTC, and SDTI in tort liability matters in accordance with the terms and conditions as stated on MTS Doc No. G1423.0-12.

SCHEDULE

There is no change to the term of this agreement.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$170,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$440,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

David C. Skyer, Attorney
David C. Skyer, APC

JULY2013.G1423.2-12.DAVIDSKYER.LEGAL.doc

Date: _____

Cc: S. Lockwood, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1425.2-12
LEG 491 (PC 50633)

Liebman, Quigley, Sheppard, and Soulema, APLC
Mr. James R. Rij
Managing Partner
402 West Broadway, 4th Floor
San Diego, CA 92101-3542

Dear Mr. Rij:

Subject: AMENDMENT NO. 2 TO MTS DOC. NO. G1425.0-12; LEGAL SERVICES – GENERAL
AND TORT LIABILITY, CIVIL RIGHTS

This shall serve as Amendment No. 2 to our agreement for the legal services as further described below.

STATEMENT OF WORK

Continue to represent and defend MTS, SDTC, and SDTI in tort liability and civil rights matters in accordance with the terms and conditions as stated on MTS Doc No. G1425.0-12.

SCHEDULE

There is no change to the term of this agreement.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$55,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$195,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

James J. Rij, Managing Partner
Liebman, Quigley, Sheppard, and Soulema, APLC

JULY2013.G1425.2-12.LQSS.LEGAL.doc

Date: _____

Cc: S. Lockwood, K. Landers, M. Held, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1426.2-12
LEG 491 (PC 50633)

Law Offices of Mark H. Barber
Mr. Mark H. Barber
Managing Attorney/Owner
2727 Camino del Rio South, Suite 220
San Diego, CA 92108

Dear Mr. Barber:

Subject: AMENDMENT NO. 2 TO MTS DOC. NO. G1426.0-12; LEGAL SERVICES – WORKER'S
COMPENSATION

This shall serve as Amendment No. 2 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – worker's compensation in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1426.0-12.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$120,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$285,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Mark H. Barber
Law Offices of Mark H. Barber

JULY2013.G1426.2-12.MARK H. BARBER.doc

Date: _____

Cc: K. Landers, S. Lockwood, A. Liebengood, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1428.2-12
LEG 491 (PC 50633)

Michael E. Ripley
Mr. Michael Ripley
Attorney/Proprietor
12520 High Bluff Dr., Suite 110
San Diego, CA 92130

Dear Mr. Ripley:

Subject: AMENDMENT NO. 2 TO MTS DOC. NO. G1428.0-12; LEGAL SERVICES – GENERAL
AND TORT LIABILITY

This shall serve as Amendment No. 2 to our agreement for the legal services as further described below.

STATEMENT OF WORK

Continue to represent and defend MTS, SDTC, and SDTI in tort liability matters in accordance with the terms and conditions as stated on MTS Doc No. G1428.0-12.

SCHEDULE

There is no change to the term of this agreement.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$90,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$320,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Michael E. Ripley, Attorney/Proprietor
Michael E. Ripley

JULY2013.G1428.2-12.M.RIPLEY.LEGAL.doc

Date: _____

Cc: S. Lockwood, K. Landers, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1430.2-12
LEG 491 (PC 50633)

Paul, Plevin, Sullivan, and Connaughton, LLP
Mr. J. Rod Betts
Partner
101 W. Broadway, 9th Floor
San Diego, CA 921081

Dear Mr. Betts:

Subject: AMENDMENT NO. 2 TO MTS DOC. NO. G1430.0-12; LEGAL SERVICES – LABOR AND
EMPLOYMENT, ADA, CIVIL RIGHTS AND PUBLIC ENTITY

This shall serve as Amendment No. 2 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – labor and employment, ADA, civil rights and public entity law in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1430.0-12.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$150,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$370,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked “original” to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

J. Rod Betts
Paul, Plevin, Sullivan and Connaughton, LLP

JULY2013.G1430.2-12.PAULPLEVIN.doc

Date: _____

Cc: K. Landers, J. Stumbo, S. Lockwood, B. Shannon, A. Crowhurst, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1432.2-12
LEG 491 (PC 50633)

Ryan Mercaldo LLP
Mr. Norman Ryan
Attorney
3636 Nobel Dr., Suite 200
San Diego, CA 92122-1063

Dear Mr. Ryan:

Subject: AMENDMENT NO. 2 TO MTS DOC. NO. G1432.0-12; LEGAL SERVICES – GENERAL
LIABILITY, LABOR EMPLOYMENT, CONSTRUCTION AND INSURANCE LAW

This shall serve as Amendment No. 2 to our agreement for the legal services as further described below.

STATEMENT OF WORK

Continue to provide legal services – general liability, labor and employment law, construction and insurance law in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1432.0-12.

SCHEDULE

There is no change to the term of this agreement.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$180,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$360,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked “original” to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Norman Ryan, Attorney
Ryan Mercaldo LLP

JULY2013.G1432.2-12.RYANMERCALDO.LEGAL.doc

Date: _____

Cc: K. Landers, S. Lockwood, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1433.3-12
LEG 490 (PC 50633)

Trovillion, Inveiss and Demakis, APC
Ms. Nicole Demakis
Partner
1010 Second Ave., Suite 1600
San Diego, CA 92101

Dear Ms. Demakis:

Subject: AMENDMENT NO. 3 TO MTS DOC. NO. G1433.0-12; LEGAL SERVICES – WORKER'S
COMPENSATION

This shall serve as Amendment No. 3 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – worker's compensation in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1433.0-12.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$100,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$225,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Nicole Demakis
Trovillion, Inveiss and Demakis, APC

JULY2013.G1433.3-12.TROVILLIONINVEISSDEMAKIS.doc

Date: _____

Cc: K. Landers, S. Lockwood, A. Liebengood, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1434.1-12
LEG 491 (PC 50633)

Wheatley Bingham & Baker, LLP
Mr. Roger P. Bingham
Partner
1201 Camino Del Mar, Suite 201
Del Mar, CA 92014

Dear Mr. Beach:

Subject: AMENDMENT NO. 1 TO MTS DOC. NO. G1434.0-12; LEGAL SERVICES – GENERAL & TORT LIABILITY

This shall serve as Amendment No. 1 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – general & tort liability in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1434.0-12.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$325,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$640,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Roger P. Bingham
Wheatley Bingham & Baker, LLP

JULY2013.G1434.1-12.WBB.doc

Date: _____

Cc: K. Landers, S. Lockwood, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1455.1-12
LEG 491 (PC 50633)

Laughlin, Falbo, Levy & Moresi LLP
Ms. Marijo Kuperman, Esq.
Managing Partner
600 B Street, Suite 2300
San Diego, CA 92101

Dear Ms. Kuperman:

Subject: AMENDMENT NO. 1 TO MTS DOC. NO. G1455.0-12; LEGAL SERVICES – WORKER'S
COMPENSATION

This shall serve as Amendment No. 1 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – worker's compensation in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1455.0-12.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$60,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$110,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Marijo Kuperman
Laughlin, Falbo, Levy & Moresi LLP

JULY2013.G1455.1-12.LFLM.doc

Date: _____

Cc: K. Landers, S. Lockwood, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1490.1-13
LEG 491 (PC 50633)

Liedle, Lounsbery, Larson & Lidl, LLP
Mr. Matthew J. Liedle
Managing Partner
12520 High Bluff Dr., Suite 200
San Diego, CA 92130

Dear Mr. Liedle:

Subject: AMENDMENT NO. 1 TO MTS DOC. NO. G1490.0-13; LEGAL SERVICES – GENERAL LIABILITY, LABOR AND EMPLOYMENT LAW, CONSTRUCTION CONTRACTS AND CLAIMS, AMERICANS WITH DISABILITIES ACT (ADA), AND CIVIL RIGHTS

This shall serve as Amendment No. 1 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – general liability, labor and employment law, construction contracts and claims, Americans with Disabilities Act (ADA), and civil rights in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1490.0-13.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$100,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$150,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked “original” to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Matthew J. Liedle
Liedle, Lounsbery, Larson & Lidl, LLP

JULY2013.G1490.1-13.LLLL.doc

Date: _____

Cc: K. Landers, S. Lockwood, C. Aquino, Procurement File

DRAFT

July 18, 2013

MTS Doc. No. G1491.1-13
LEG 491 (PC 50633)

Manning & Kass, Ellrod, Ramirez, Trester, LLP
Ms. Marguerite Lieu Jonak
Partner
550 West C Street, Suite 900
San Diego, CA 92101

Dear Ms. Jonak:

Subject: AMENDMENT NO. 1 TO MTS DOC. NO. G1491.0-13; LEGAL SERVICES – GENERAL LIABILITY, WORKER'S COMPENSATION, LABOR AND EMPLOYMENT LAW, CONSTRUCTION CONTRACTS AND CLAIMS, AMERICANS WITH DISABILITIES ACT (ADA), CIVIL RIGHTS, CRIMINAL LAW, AND REAL ESTATE

This shall serve as Amendment No. 1 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – general liability, worker's compensation, labor and employment law, construction contracts and claims, Americans with Disabilities Act (ADA), civil rights, criminal law, and real estate in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1491.0-13.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$35,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$85,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Agreed:

Paul C. Jablonski
Chief Executive Officer

Marguerite Lieu Jonak
Manning & Kass, Ellrod, Ramirez, Trester, LLP

JULY2013.G1491.1-13.MANNING&KASS.doc

Date: _____

Cc: K. Landers, S. Lockwood, C. Aquino, Procurement File



Metropolitan Transit System

Att. M, AI 12, 7/18/13

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

ORIGINAL

April 18, 2013

MTS Doc. No. G1426.1-12
LEG 491 (PC 50633)

Law Offices of Mark H. Barber
Mr. Mark H. Barber
Managing Attorney/Owner
2727 Camino del Rio South, Suite 220
San Diego, CA 92108

Dear Ms. Demakis:

Subject: AMENDMENT NO. 1 TO MTS DOC. NO. G1426.0-12; LEGAL SERVICES – WORKER'S
COMPENSATION

This shall serve as Amendment No. 1 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – worker's compensation in accordance with the terms and conditions of the original agreement, MTS Doc. No. G1426.0-12.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$25,000 for legal services. The total value of this contract including this amendment shall be in the amount of \$165,000. This amount shall not be exceeded without written approval from MTS.

Please sign and return the copy marked "Original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Paul G. Jablonski
Chief Executive Officer

Agreed:

Mark H. Barber
Law Offices of Mark H. Barber

Date: May 6, 2013

LMARQUIS-CL
CL-G1426.1-12.MBARBERATTY.CAQUINO.041813

Cc: K. Landers, S. Lockwood, A. Liebengood, C. Aquino, Procurement File

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Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.





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ORIGINAL

May 16, 2013

MTS Doc. No. G1430.1-12
LEG 491 (PC 50633)

Paul, Plevin, Sullivan, and Connaughton, LLP
Mr. J. Rod Betts
Partner
401 B Street, 10th Floor
San Diego, CA 921081

Dear Mr. Betts:

Subject: AMENDMENT NO. 1 TO MTS DOC. NO. G1430.0-12; LEGAL SERVICES – LABOR AND
EMPLOYMENT, ADA, CIVIL RIGHTS AND PUBLIC ENTITY

This shall serve as Amendment No. 1 to our agreement for the legal services as further described below.

SCOPE

Continue to provide legal services – labor and employment, ADA, civil rights and public entity law in
accordance with the terms and conditions of the original agreement, MTS Doc. No. G1430.0-12.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$20,000 for legal services. The
total value of this contract including this amendment shall be in the amount of \$220,000. This amount shall
not be exceeded without written approval from MTS.

Please sign and return the copy marked "Original" to the Contracts Specialist at MTS. All other terms and
conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Paul C. Jablonski
Chief Executive Officer

Agreed:

J. Rod Betts
Paul, Plevin, Sullivan and Connaughton, LLP

Date:

6/3/13

LMARQUIS-CL

CL-G1430.1-12.PPSCLLP.CAQUINO.051613

Cc: K. Landers, J. Stumbo, S. Lockwood, B. Shannon, A. Crowhurst, C. Aquino, Procurement File

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(nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities.
MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.





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San Diego, CA 92101-7490
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Agenda Item No. 13

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

TRACTION POWER SUBSTATIONS FOR THE SAN DIEGO TROLLEY, INC. SYSTEM
– CONTRACT AMENDMENTS

RECOMMENDATION:

That the Board of Directors:

- 1) ratify Amendment Nos. 1-6 to MTS Document No. L1032.0-12 (Attachment A) with Siemens Industry, Inc., which were previously approved under the CEO's approval authority; and
- 2) authorize the Chief Executive Officer (CEO) to execute MTS Doc. No. L1032.7-12 (Attachment B) with Siemens Industry, Inc. to increase the total contract spending authority to cover previously unknown site-access constraints and San Diego Gas and Electric's (SDG&E's) stricter passage requirements during installation.

Budget Impact

Amendment Nos. 1-6 total \$85,048.19, and Amendment No. 7 totals \$414,951.81 for a grand total of \$500,000. Funding for this project is under SANDAG CIP 1210040. Amendment Nos. 1 through No. 7 increase the contract authority from the original \$12,902,805.47 to a revised amount of \$13,159,374.94.

DISCUSSION:

On January 19, 2012, the MTS Board of Directors authorized the CEO to execute MTS Doc. No. L1032.0-12 with Siemens Industry, Inc. to procure 17 traction power substations, with an option to purchase up to 17 additional units for the San Diego Trolley, Inc. (SDTI) North Corridor.

During the construction of the pads for these substations, several previously unknown conditions were discovered. Among them were constraints relative to access to construction sites that required the delivery of the units to be shifted to nonrevenue hours and SDG&E's stricter requirements for access clearances during power shutdown outages.

The following table lists previously issued Amendment Nos. 1 through 6, the value of each, and the different elements that constitute Amendment No. 7:

Doc #	Amend #	Description	Amount	Date
L1032.1-12	1	Battery Adjustment	\$0	11/15/2012
L1032.2-12	2	Change Delivery Date for Shop 1 TPSS	\$0	04/09/2013
L1032.3-12	3	Additional 2 rear access doors per substation	\$32,257.50	04/09/2013
L1032.4-12	4	Additional cost for crane service at Shop 1 TPSS	\$11,672.50	04/09/2013
L1032.5-12	5	Additional cost for crane service at Barrio Logan TPSS	\$11,672.50	04/26/2013
L1032.6-12	6	8% Tax Adjustment	\$29,445.69	05/13/2013
		Total	\$85,048.19	
L1032.7-12	7	Anticipated additional cost for crane service at Seaward, J Street, 8 th Street, and Pacific Fleet TPSS	\$46,690.00	TBD
L1032.7-12	7	Material & Installation of NEMA 3R AC Gear 2596 Commercial Street, San Diego CA	\$151,979.47	TBD
L1032.7-12	7	TPSS Storage Fee	\$57,900	TBD
		Contingency	\$158,382.34	TBD
		Total	\$414,951.81	
		GRAND TOTAL	\$500,000	

Therefore, staff is requesting that the Board of Directors ratify Amendment Nos. 1 through 6 and authorize the CEO to execute Amendment No. 7 to address previously unknown conditions recently discovered in this project.



Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com

Attachments: A. MTS Doc. No. L1032.0-12 Amendment Nos. 1-6
B. MTS Doc. No. L1032.7-12 Amendment No. 7



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San Diego, CA 92101-7490
(619) 231-1466 • FAX (619) 234-3407

ORIGINAL

September 18, 2012

MTS Doc. No. L1032.1-12
OPS 970.4

Mr. Chris Hammett, PM
Siemens Industry, Inc.
555 Maine Avenue, #304
Long Beach, CA 90802

Dear Mr. Hammett:

Subject: AMENDMENT NO. 1 TO MTS DOC. NO. L1032.0-12 – FOR THE PROCUREMENT OF 17 TRACTION POWER SUBSTATIONS WITH AN OPTION TO PURCHASE UP TO 17 ADDITIONAL TRACTION POWER SUBSTATIONS.

This amendment shall serve to modify our agreement for the procurement of 17 traction power substations with an option to purchase up to 17 additional traction power substations, as further described below.

SCOPE OF SERVICES

Amend Contract Specification Section 4.2.18 - 125V DC Battery and Battery Charger, Item B.1 as follows:

Delete Item B.1 in its entirety and replace with "The battery cells shall be sealed valve regulated lead acid (VRLA) type, with a minimum of 10 years of life under normal usage for intended duty"

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

There shall be no change to the payment provisions of this contract.

If you agree with the above, please sign in the space provided below and return the document marked "Original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Paul G. Jablonski
Chief Executive Officer

Accepted:

Chris Hammett, PM

LMARQUIS-CL
CL-L1032.1-12.SIEMENS.MYNIGUEZ.091812

Date: 9.30.2012

1255 Imperial Avenue, Suite 1000, San Diego, CA 92101-7490 • (619) 231-1466 • www.sdmts.com

Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.





Metropolitan Transit System

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San Diego, CA 92101-7490
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ORIGINAL

March 19, 2013

MTS Doc. No. L1032.2-12
OPS 970.4

Mr. Chris Hammett
Project Manager
Siemens Industry, Inc.
555 Maine Avenue Suite 304
Long Beach, CA 90802

Dear Mr. Hammett:

Subject: AMENDMENT NO. 2 TO MTS DOC. NO. L1032.0-12 – FOR THE PROCUREMENT OF 17
TRACTION POWER SUBSTATIONS WITH AN OPTION TO PURCHASE UP TO 17
ADDITIONAL TRACTION POWER SUBSTATIONS

This amendment shall serve to modify our agreement for the procurement of 17 traction power substations with an option to purchase up to 17 additional traction power substations, as further described below.

SCOPE OF SERVICES

Amend page 18, Section Table 4.1.7 A: TPSS Delivery to site (Arrival) number (1) one, 2.0 MW Substation from March 26, 2013 to April 16, 2013. TPSS address location 1192 Kettner Boulevard, San Diego, CA.

SCHEDULE

There shall be no changes to the schedule of this contract.

PAYMENT

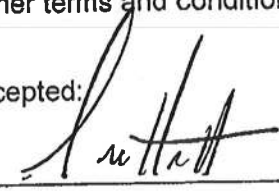
There shall be no change to the payment provisions of this contract.

If you agree with the above, please sign in the space provided below and return the document marked "Original" to the Contracts Administrator at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,


Paul C. Jablonski
Chief Executive Officer

Accepted:


Chris Hammett
Project Manager

LMARQUIS-CL
CL-L1032.2-12.SIEMENSINDINC.MYNIGUEZ.031913

Date: 3.23.2013

1255 Imperial Avenue, Suite 1000, San Diego, CA 92101-7490 • (619) 231-1466 • www.sdmte.com

Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.





Metropolitan Transit System

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San Diego, CA 92101-7490
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ORIGINAL

March 26, 2013

MTS Doc. No. L1032.3-12
OPS 970.4

Mr. Chris Hammett
Project Manager
Siemens Industry, Inc.
555 Maine Avenue Suite 304
Long Beach, CA 90802

Dear Mr. Hammett:

Subject: AMENDMENT NO. 3 TO MTS DOC. NO. L1032.0-12 – FOR THE PROCUREMENT OF 17
TRACTION POWER SUBSTATIONS WITH AN OPTION TO PURCHASE UP TO 17
ADDITIONAL TRACTION POWER SUBSTATIONS

This amendment shall serve to modify our agreement for the procurement of 17 traction power substations with an option to purchase up to 17 additional traction power substations, as further described below.

SCOPE OF SERVICES

Amend page 29, Section Table 4.2.2 D: Substation Enclosure as follows:

Add Item D: 3. The substation shall have two rear access doors for the surge arrestors section as shown on drawings ASTR-M-BUI004 Rev B for 2.0 MW Building and drawing ASTR-M-BUI004 Rev C for 1.5 MW Building.

SCHEDULE

There shall be no changes to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$ 32,257.50.

The total value of this contract including this amendment shall be in the amount of \$ 12,935,062.97.
This amount shall not be exceeded without written approval from MTS.

If you agree with the above, please sign in the space provided below and return the document marked "Original" to the Contracts Administrator at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Paul C. Jablonski
Chief Executive Officer

Accepted:

Chris Hammett
Project Manager

Date: 3.28.2013

LMARQUIS-CL
CL-L1032.3-12.SIEMENSINDINC.MYNIGUEZ.032613

1255 Imperial Avenue, Suite 1000, San Diego, CA 92101-7490 • (619) 231-1466 • www.sdmts.com

Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.





Metropolitan Transit System

1255 Imperial Avenue, Suite 1000
San Diego, CA 92101-7490
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ORIGINAL

April 05, 2013

MTS Doc. No. L1032.4-12
OPS 970.4

Mr. Chris Hammett
Project Manager
Siemens Industry, Inc.
555 Maine Avenue, Suite 304
Long Beach, CA 90802

Dear Mr. Hammett:

Subject: AMENDMENT NO. 4 TO MTS DOC. NO. L1032.0-12 – FOR THE PROCUREMENT OF 17
TRACTION POWER SUBSTATIONS WITH AN OPTION TO PURCHASE UP TO 17
ADDITIONAL TRACTION POWER SUBSTATIONS

This amendment shall serve to modify our agreement for the procurement of 17 traction power substations with an option to purchase up to 17 additional traction power substations, as further described below.

SCOPE OF SERVICES

Amend Page 19, Section A: Delivery, Storage and Handling of Material, Paragraph 1.

Add: Delivery to 152 South 13th Street, San Diego, CA shall occur between 9 pm on April 9, 2013 and 10 am on April 10, 2013.

SCHEDULE

There shall be no changes to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$ 11,672.50.

The total value of this contract including this amendment shall be in the amount of \$ 12,946,735.47.
This amount shall not be exceeded without written approval from MTS.

If you agree with the above, please sign in the space provided below and return the document marked "Original" to the Contracts Administrator at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Paul C. Jablonski
Chief Executive Officer

Accepted:

Chris Hammett
Project Manager

LMARQUIS-CL
CL-L1032.4-12.SIEMENSINDINC.MYNIGUEZ.040513

Date: April 8, 2013

1255 Imperial Avenue, Suite 1000, San Diego, CA 92101-7490 • (619) 231-1466 • www.sdmts.com

Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 601(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.





Metropolitan Transit System

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

April 22, 2013

ORIGINAL

MTS Doc. No. L1032.5-12
OPS 970.5

Mr. Chris Hammett
Project Manager
Siemens Industry, Inc.
555 Maine Avenue, Suite 304
Long Beach, CA 90802

Dear Mr. Hammett:

Subject: AMENDMENT NO. 5 TO MTS DOC. NO. L1032.0-12 – FOR THE PROCUREMENT OF 17
TRACTION POWER SUBSTATIONS WITH AN OPTION TO PURCHASE UP TO 17
ADDITIONAL TRACTION POWER SUBSTATIONS

This amendment shall serve to modify our agreement for the procurement of 17 traction power substations with an option to purchase up to 17 additional traction power substations, as further described below.

SCOPE OF SERVICES

Amend Page 19, Section A: Delivery, Storage and Handling of Material, Paragraph 1.
Add: Delivery to 1270 East Harbor Drive, San Diego, CA shall occur between 7 pm on April 23, 2013 and 7 am on April 24, 2013.

SCHEDULE

There shall be no changes to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$ 11,672.50.

The total value of this contract including this amendment shall be in the amount of \$ 12,958,407.97.
This amount shall not be exceeded without written approval from MTS.

If you agree with the above, please sign in the space provided below and return the document marked "Original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Paul C. Jablonski
Chief Executive Officer

Accepted:

Chris Hammett
Project Manager

LMARQUIS-CL
CL-L1032.5-12.SIEMENSINDINC.MYNIGUEZ.042213

Date: April 24, 2013

1255 Imperial Avenue, Suite 1000, San Diego, CA 92101-7490 • (619) 231-1466 • www.sdmts.com

Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.





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San Diego, CA 92101-7490
(619) 231-1466 • FAX (619) 234-3407

ORIGINAL

May 07, 2013

MTS Doc. No. L1032.6-12
OPS 970.5

Mr. Chris Hammett
Project Manager
Siemens Industry, Inc.
555 Maine Avenue Suite 304
Long Beach, CA 90802

Dear Mr. Hammett:

Subject: AMENDMENT NO. 6 TO MTS DOC. NO. L1032.0-12 – TRACTION POWER SUBSTATIONS

This amendment shall serve to modify our agreement for the procurement of Traction Power Substations, as further described below.

SCOPE OF SERVICES

There shall be no changes to the scope of work of this contract.

SCHEDULE

There shall be no changes to the schedule of this contract.

PAYMENT

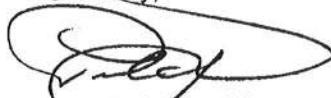
This Amendment No. 6 is issued to align the sales tax rate of 7.75%, as it was originally provided in the Agreement, with the revised California sales tax rate of 8.00%. The revised rate is effective as of January 1, 2013. This rate change is to comply with the California state tax initiative.

This Amendment No. 6 authorizes an additional sum of \$ 29,445.69 to cover MTS' additional tax liabilities under the Agreement only.

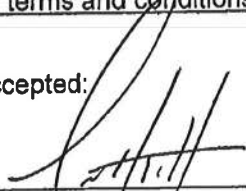
The value of this contract is hereby adjusted by \$29,445.69, from the original \$12,958,407.97 to a new total of \$12,987,853.66. This revised amount shall not be exceeded without a written Amendment issued by MTS.

If you agree with the above, please sign in the space provided below and return the document marked "Original" to the Contracts Specialist at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,


Paul C. Jablonski
Chief Executive Officer

Accepted:


Chris Hammett
Project Manager

Date: MAY 17, 2013

LMARQUIS-CL
CL-L1032.6-12.SIEMENS.MYNIGUEZ.050713

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Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lemon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.



DRAFT

Att. B, AI 13, 7/18/13

July 18, 2013

MTS Doc. No. L1032.7-12

Mr. Chris Hammett, PM
Siemens Industry, Inc.
555 Maine Avenue #304
Long Beach, CA 90802

Dear Mr. Hammett:

Subject: AMENDMENT NO. 7 TO MTS DOC. NO. L1032.0-12 – FOR THE PROCUREMENT OF 17 TRACTION POWER SUBSTATIONS WITH AN OPTION TO PURCHASE UP TO 17 ADDITIONAL TRACTION POWER SUBSTATIONS

This amendment shall serve to modify our agreement for the procurement of 17 traction power substations with an option to purchase up to 17 additional traction power substations, as further described below.

SCOPE OF SERVICES

Amend Page 19, Section A - Delivery, Storage and Handling of Material, Paragraph 1.

Add: Delivery to 139 West Seaward Avenue, San Diego, CA, shall occur between 9 p.m. on September 13, 2013, and 10 a.m. on September 14, 2013.

Amend Page 19, Section A - Delivery, Storage and Handling of Material, Paragraph 1.

Add: Delivery to 1110 Industrial Boulevard, Chula Vista, CA, shall occur between 9 p.m. on March 1, 2014, and 10 a.m. on March 2, 2014.

Amend Page 19, Section A - Delivery, Storage and Handling of Material, Paragraph 1.

Add: Delivery to 309 West 8th Street, National City, CA, shall occur between 9 p.m. on March 6, 2014, and 10 a.m. on March 7, 2014.

Amend Page 19, Section A - Delivery, Storage and Handling of Material, Paragraph 1.

Add: Delivery to Pacific Fleet Trolley Station and Candles Boulevard, National City, CA, shall occur between 9 p.m. on March 13, 2014, and 10 a.m. on March 14, 2014.

Amend Page 19, Section A - Delivery, Storage and Handling of Material, Paragraph 1.

Add: Material and Installation of NEMA 3R AC Gear to 2596 Commercial Street, San Diego, CA.

Amend Page 20, Section B - Storage of TPSS Paragraph 1.

Remove: In the event that MTS requests a delivery date later than the date specified on Table 4.1.7A "TPSS Delivered to Site (Arrival) Dates," the Contractor shall store the delayed TPSS in Contractor's storage facility. MTS will notify the Contractor fifteen (15) business days prior to shipment of MTS request for a modification to the Contract delivery date. The Contractor will be compensated per day for TPSS storage, based on the Contractor rate in the bid form. The Contractor is responsible for the TPSS while in the Contractor's storage facility and shall supply security and power for the TPSS.

DRAFT

Add: In the event that MTS requests a delivery date later than the date specified on Table 4.1.7A "TPSS Delivered to Site (Arrival) Dates," the Contractor shall store the delayed TPSS in Contractor's storage facility for up to six hundred (600) days. MTS will notify the Contractor fifteen (15) business days prior to shipment of MTS request for a modification to the Contract delivery date. The Contractor will be compensated per day for TPSS storage based on the Contractor rate in the bid form. The Contractor is responsible for the TPSS while in the Contractor's storage facility and shall supply security and power for the TPSS.

SCHEDULE

There shall be no change to the schedule of this contract.

PAYMENT

This contract amendment shall authorize additional costs not to exceed \$256,569.47.

The total value of this contract including this amendment shall be in the amount of \$13,159,374.94. This amount shall not be exceeded without written approval from MTS.

If you agree with the above, please sign in the space provided below and return the document marked "Original" to the Contracts Specialists at MTS. All other terms and conditions shall remain the same and in effect. Retain the other copy for your records.

Sincerely,

Accepted:

Paul C. Jablonski
Chief Executive Officer

Chris Hammett
Project Manager

Date: _____



Metropolitan Transit System

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

Agenda Item No. 14

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 12, 2013

SUBJECT:

MONUMENT SIGNS AT ORANGE LINE STATIONS – APPROVE WORK ORDER

RECOMMENDATION:

That the Board of Directors authorize the Chief Executive Officer (CEO) to execute Work Order No. MTSJOC1431-05 (Attachment A) with ABC Construction, Inc. (under MTS Doc. No. PWL135.0-12) for the installation of new monument signs at the 47th Street, Encanto/62nd Street, Euclid Avenue, Massachusetts Avenue, and Spring Street stations on the Orange Line.

Budget Impact

The direct costs of this Work Order would be \$256,841.35. MTS's use of the Association of Governments (SANDAG) Job Order Contracts (JOCs) requires a 6.75% surcharge totaling \$17,336.79 for this project, included in items (a) and (b) below, for administrative costs. Thus, the total amount for this JOC Work Order would be a not-to-exceed amount of \$274,178.14 and would be funded as follows:

- a) MTS's FY 2014 CIP (11346-1000) Orange Line Monument Signs: \$132,000.00 (48%)
- b) SANDAG CIP (1210070-1000) Orange Line Stations: \$142,178.14 (52%)

DISCUSSION:

This project is for the installation of monument signs at the 47th Street, Encanto/62nd Street, Euclid Avenue, Massachusetts Avenue, and Spring Street stations on MTS's Orange Line. Currently, there are no signs that identify MTS services or entrances to parking facilities along the major thoroughfares adjacent to the stations. These signs will

provide greater visibility of MTS trolley stations and help communicate the availability of nearby transit services to the public. The signs will be illuminated for night-time visibility.

The signs will be of tubular steel, 16 feet high by 4 feet wide, with reinforced concrete foundations. MTS has already installed similar monument signs at several downtown San Diego locations and on the Green Line. An example of this sign is located on the east platform at the 12th Street & Imperial Avenue Station.

The work will be completed over 17 weeks with construction taking place between 7:00 a.m. and 4:30 p.m. Fabrication of the signs is expected to begin in August 2013 with work completed in December 2013.

Staff requests that the MTS Board of Directors authorize the CEO to execute Work Order No. MTSJOC1431-05 (in substantially the same format as Attachment A) with ABC Construction, Inc. (under MTS Doc No. PWL135.0-12) for the installation of new monument signs at the 47th Street, Encanto/62nd, Euclid Avenue, Massachusetts Avenue, and Spring Street stations on the Orange Line.



Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney 619.557.4513, Sharon.Cooney@sdmts.com

Attachments: A. Work Order No. MTSJOC1431-05
B. Design Drawing Sign Type 1 Identification

Job Order Contract

Contractor's Price Proposal Summary- CSI

This price proposal - all information and data - shall not be duplicated, used, or disclosed in whole or in part for any purpose other than to evaluate this price proposal. This price proposal - all information and data - is Confidential and Proprietary.

Work Order #: MTSJOC1431-05
 Title: Station Monument Signs
 Contractor: ABC Construction, Inc.
 Proposal Value: \$256,841.35
 Proposal Name: Station Monument Signs

To: Michael Diana
 Assistant Resident Engineer
 1255 Imperial Avenue, Suite 900
 San Diego, CA 92101

From: Kenneth Czubernat
 Project Manager
 ABC Construction Co. Inc.
 3120 National Ave

San Diego, Ca 92113

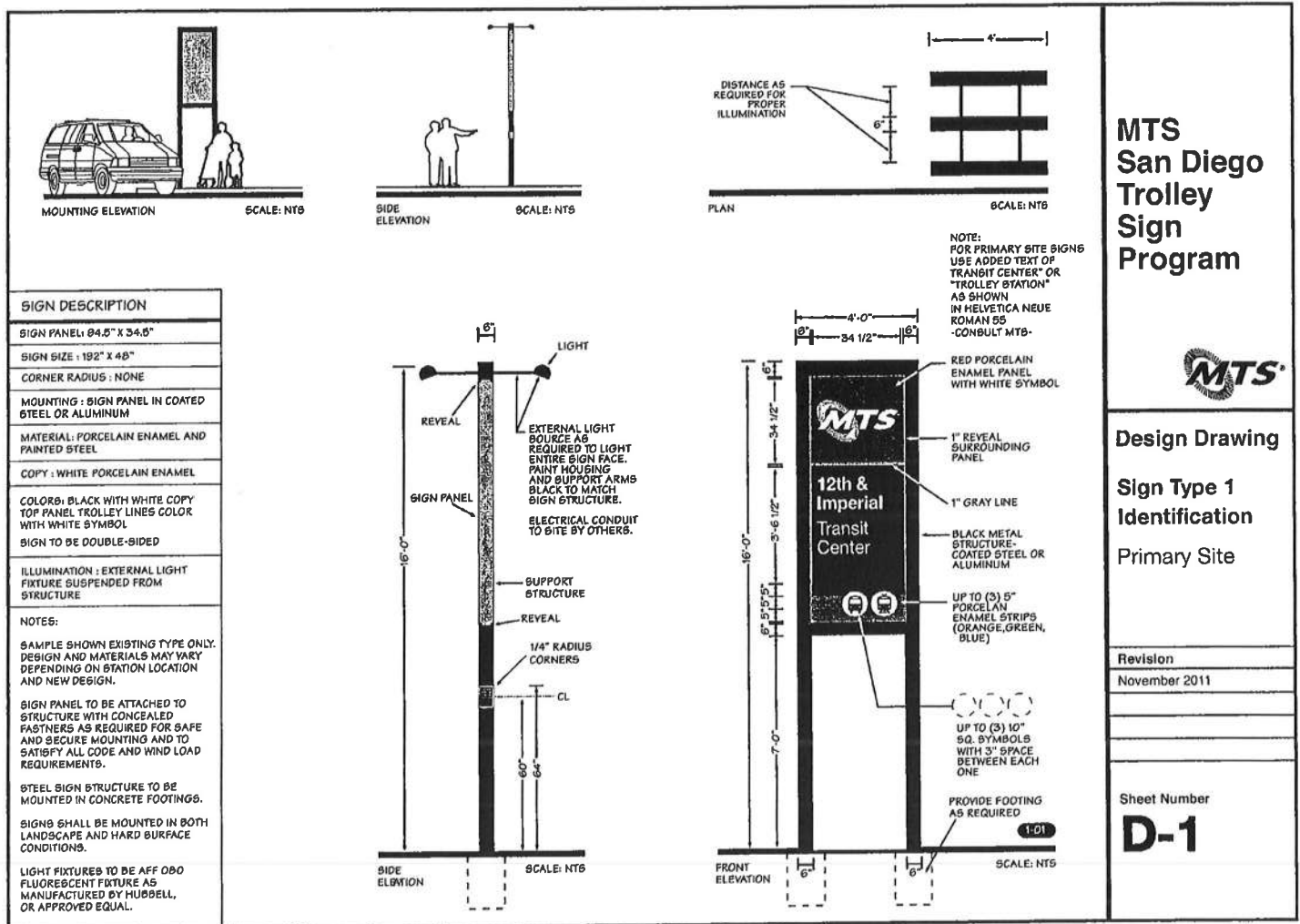
01 - General Requirements:	\$100,946.61
02 - Site Work:	\$22,453.96
03 - Concrete:	\$52,910.00
12 - Furnishings:	\$80,530.78
Work Order Proposal Total	\$256,841.35

This work order proposal total represents the correct total for the proposal. Any discrepancy between line totals, sub-totals and the proposal total is due to rounding of the line totals and sub-totals.

The Percent of NPP on this Proposal: 55.36%


 Kenneth Czubernat, Project Manager

4/11/13
 Da



MTS San Diego Trolley Sign Program



Design Drawing

Sign Type 1
Identification

Primary Site

Revision
November 2011

Sheet Number

D-1



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San Diego, CA 92101-7490
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Agenda Item No. 15

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

TAXICAB ADVISORY COMMITTEE ELECTION

RECOMMENDATION:

That the Board approve the Taxicab Advisory Committee's (TAC's) recommendation to:

1. defer a decision about if and when to hold an election of TAC members until such time that either:
 - a. the City of San Diego assumes administration of taxicab regulation in San Diego or;
 - b. the City of San Diego requests an additional extension to the existing contract with MTS for taxicab administration; and
2. retain the current membership of the TAC into calendar year 2014 (assuming the current members are willing) pending a decision by the TAC on when to hold the next election.

Budget Impact:

None at this time.



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 San Marcos, and the County of San Diego.

DISCUSSION:

At the Taxicab Advisory Committee on June 14, 2013, members agreed that postponement of the TAC member election would be appropriate until it is decided whether the City of San Diego will assume administration of taxicab regulation. The City of San Diego has indicated a desire to assume administration of the regulatory function at the end of the existing contracts, which expires June 30, 2014. Members were polled by the Chair of the Committee, and those present agreed to serve into 2014.

A roster of TAC membership is attached (Attachment A).



Paul G. Jablonski
Chief Executive Office

Key Staff Contact: Sharon Cooney, 619.557.4513, sharon.cooney@sdmts.com

Attachment: A. TAC membership roster 2013

TAXICAB COMMITTEE MEMBERSHIP – 2013

NAME	CONSTITUENCY / ORGANIZATION
1. Lorie Zapf, Chair	City of San Diego, City Council
2. Darren Pudgil	San Diego Tourism Authority
3. David Boenitz	San Diego County Regional Airport Authority
4. Josh Layne	San Diego Convention Center
5. Anthony Palmeri	San Diego Traveler's Aid Society
6. Namara Mercer	San Diego Hotel/Motel Assoc.-Hotel Industry
7. Mike Staples	San Diego Hotel/Motel Assoc.-Hotel Industry
8. Kamran Hamidi	V.I.P. Taxi
9. Cameron Haratian	P.B. Cab
10. Akbar Majid	SDYC, LLC
11. George Abraham	Eritrean Cab Inc.
12. Alexander Gebreselassie	Cross Town Transportation LLC
13. Jose Antonio Hueso	USA Cab LTD
14. Hushang Nahavandian	ESM Corp.
15. Margo Tanguay	Driver Representative
16. Berhanu Lemma	Driver Representative
17. Nuur Hussein	Driver Representative



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Agenda Item No. 45

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

CUSTOMER SATISFACTION SURVEY (2011 AND 2013) (ROB SCHUPP)

RECOMMENDATION:

That the Board of Directors receive the Report for information and comment.

Budget Impact

None at this time.

DISCUSSION:

In late 2010, MTS selected Luth Research (through a competitive Request for Proposal process) as the independent market research company to conduct three customer satisfaction surveys. The surveys are being spaced out over an approximate four-year period to evaluate, monitor, and compare customer satisfaction levels and perceptions about a variety of key areas, including:

- MTS Bus and Trolley fixed-route services;
- MTS operator and security staff courtesy;
- MTS customer service effectiveness and responsiveness;
- System improvement projects;
- Fare product pricing and convenience; and
- Transit information tools



Results from the initial survey conducted in spring 2011 established a baseline as well as provided staff with insights in customers' satisfaction levels and areas of concern. Results from the 2013 Survey conducted this past spring have been received. This report compares the results of the 2011 Survey with results from the 2013 Survey.



Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.cooney@sdmts.com

Attachment: Survey Report available online at http://www.sdmts.com/MTS/MTS_board.asp.



Results of the 2013 San Diego Metropolitan Transit System Passenger Satisfaction Survey

June 2013



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Section 1: Overview

Background & Objectives

The San Diego Metropolitan Transit System (SDMTS) is the largest provider of public transportation in San Diego County and the 2009 winner of the American Public Transportation Association's award for Most Outstanding Public Transit System. SDMTS is responsible for the service planning, scheduling, and performance monitoring of all SDMTS transit services. Its ridership is 94 million annual passengers or 290,000 passengers each weekday.

In 2011, SDMTS began implementing a variety of major changes in the transportation system. The changes include, but are not limited to:

- Replacing the majority of light rail vehicles (LRVs) with low-floor LRVs
- Making renovations to the majority of rail stations
- Making real time text information such as 'next route' arrivals available via mobile phone
- Installing security cameras onboard buses and trolleys
- Introducing Bus Rapid Transit (BRT) vehicles and routes
- Completing the transition to electronic fare collection

SDMTS wants to track rider satisfaction levels over the period of time that the changes are implemented. Specifically, its goal is to obtain the opinions of bus and trolley riders regarding SDMTS' fixed route transit services.

To achieve this objective, SDMTS contracted Luth Research, an independent market research company, to conduct customer satisfaction surveys. The initial two surveys were conducted in spring of 2011 and spring of 2013 and will be repeated in spring 2014. The first survey's results established baseline satisfaction metrics which will be used in the two follow-up surveys to track rider satisfaction as the organization implements substantial changes to their transportation system.

This report compares the results of the first follow-up survey which was conducted in March of 2013 to the results of the initial survey which was conducted in May of 2011.

Methodology

Luth Research utilized an intercept methodology to interview a total of 1,386 riders in 2013. Riders were interviewed before boarding or while on board bus and rail transit lines in the SDMTS' district.

Interviews were conducted on weekdays and weekends in peak and off-peak hours. Fielding started on March 18th and concluded on April 29th.

To achieve both sufficient representation of riders from the four zones in the SDMTS district and allow for sub-group analysis, Luth Research applied the following sample plan:

Zone	Sample Distribution
South Bay	23%
East County	23%
Central Urban	32%
North I-15 Corridor	23%

These zone sample sizes yielded a +/-5.74% to +/-4.85% margin of error at the 95% confidence level for the estimated rider population in each zone.

The interviews were conducted in-person by both English and Spanish speaking interviewers. Riders who either did not have time to take the survey in-person or spoke neither English nor Spanish were invited to visit an online platform where surveys were offered in English, Spanish, Vietnamese, Chinese, and Tagalog.

Interviewers approached riders randomly and asked those 13 years of age or older to participate in the satisfaction survey. Criteria for participation included:

- Non-SDMTS employees
- One time participation in the survey
- 13 years of age or older

The rider satisfaction feedback was weighted using market data provided by SDMTS to ensure proportional representation of actual ridership levels across the four zones. Luth Research applied a statistical weighting procedure as a central part of the research analysis. For details on weighting, see Appendix C. For the purpose of analysis, Don't Use, No Answer, Decline and No Opinion responses were excluded from the percentage base.

Luth Research worked closely with SDMTS on the questionnaire design and sampling plan. SDMTS provided the translated Spanish version of the questionnaire. Luth was responsible for data collection, fielding management, data entry, processing and data cleaning.

Significance Testing

There are two types of significance testing reflected throughout the report:

- Comparing 2011 to 2013 (noted throughout the report by **()**)
- Within each year (2011 and 2013), comparing sub-groups to one another (noted throughout the report by bold text)

Examples:

Q10. <u>Feedback on MTS Trolleys</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS trolley stations are clean	91%	90%	87%	89%	84%	91%	91%	87%

- Comparing 2011 to 2013: riders in the Central Urban zone were significantly more likely to think *MTS trolley stations are clean* in 2013 than in 2011.
- Within each year (2011 and 2013), comparing sub-groups to one another: In 2011, riders in the South Bay and I-15 Corridor were significantly more likely to think *MTS trolley stations are clean* than riders in the Central Urban zone.

Whether two numbers are significantly different from one another depends on two things – base sizes and where the numbers fall on the spectrum between 0 and 100. These general rules apply:

- The larger the base sizes, the smaller the difference between the two numbers needs to be in order to be significantly different. This is because larger base sizes are more statistically stable.
- The closer the numbers are to 0 or 100, the smaller the difference between the two numbers needs to be in order to be significantly different. This is because there is less statistical variance at the top and the bottom of the spectrum than in the middle.

Throughout this report, if the difference between two numbers looks like it should be significantly different but is not marked, then it is either due to small base sizes or the numbers falling in the middle of the spectrum.

Section 2: Executive Summary

Evaluation of MTS, Bus and Trolley Services

While satisfaction with MTS overall was already high in 2011, ratings rose to new levels in 2013.

Specifically, riders were more likely to be very satisfied with both the overall transit service and the ability of the transit service in their area to meet their needs in 2013.

- *MTS overall transit service* (41% very satisfied in 2011 vs. 55% in 2013)
- *Transit service in my area meets my needs* (41% very satisfied in 2011 vs. 52% in 2013)

Improvements in overall satisfaction ratings were shown across all zones except the South Bay from 2011 to 2013. Satisfaction improved considerably for riders on Local/Express bus routes and the Green Line Trolley.

Opinions of MTS services either stayed on par with 2011 levels or became more favorable in 2013.

Riders were more likely to strongly agree with three out of seven service-related statements in 2013, and more likely to strongly agree or agree with three of the four remaining statements.

Significantly higher for strongly agree:

- *The Compass card is easy to use and reload* (52% in 2011 vs. 59% in 2013)
- *I am comfortable with other riders* (32% in 2011 vs. 40% in 2013)
- *There is enough room on MTS vehicles for riders in wheelchairs* (27% in 2011 vs. 35% in 2013)

Significantly higher for strongly agree or agree:

- *Transit centers are clean* (84% in 2011 vs. 91% in 2013)
- *MTS routes offer good frequency of service* (85% in 2011 vs. 90% in 2013)
- *The cost of a pass or ticket is fair* (79% in 2011 vs. 84% in 2013)

Opinions of MTS services improved across all zones between 2011 and 2013, with the most notable improvements seen in the Central Urban zone and among riders of Local/Express buses.

While perceptions of MTS bus service improved for nearly every attribute in 2013 compared to 2011, the timeliness of buses remained an area of concern.

In particular, riders were more likely to strongly agree with five out of seven bus service-related statements in 2013.

- *MTS bus stops are clean* (26% strongly agree in 2011 vs. 35% in 2013)
- *MTS buses I ride are clean* (28% strongly agree in 2011 vs. 37% in 2013)
- *MTS buses are comfortable* (28% strongly agree in 2011 vs. 40% in 2013)
- *MTS buses are easy to board* (35% strongly agree in 2011 vs. 43% in 2013)
- *The hours of service of MTS bus routes are adequate* (23% strongly agree in 2011 vs. 33% in 2013)

However, riders (specifically Local/Express) continued to give the lowest ratings to buses being on time in 2013 with no sign of improvement from 2011.

- *MTS buses I ride are always on time* (65% strongly agree or agree in 2011 vs. 67% in 2013)

Perceptions of MTS bus service were highest among I-15 Corridor riders, particularly in relation to the cleanliness of buses and bus stops as well as the courteousness of bus operators.

Attitudes toward MTS trolley service also showed considerable improvement in 2013.

Specifically, riders were more likely to strongly agree with all trolley service-related statements in 2013 that were tested in both years.

- *MTS trolley stops are clean* (27% strongly agree in 2011 vs. 38% in 2013)
- *MTS trolleys I ride are clean* (26% strongly agree in 2011 vs. 38% in 2013)
- *MTS trolleys are comfortable* (28% strongly agree in 2011 vs. 43% in 2013)
- *MTS trolleys are easy to board* (29% strongly agree in 2011 vs. 45% in 2013)
- *Bikes on the trolleys do not interfere with other riders* (18% strongly agree in 2011 vs. 34% in 2013)
- *Onboard trolley security and fare inspectors are courteous* (28% strongly agree in 2011 vs. 35% in 2013)
- *MTS trolleys I ride are always on time* (26% strongly agree in 2011 vs. 33% in 2013)

Attitudes toward the trolley service were generally consistent across the various subgroups.

MTS customer service continued to receive high satisfaction scores in 2013 while also demonstrating signs of improvement over 2011.

In particular, riders were more likely to strongly agree with each of the statements.

- *Ease to get route or schedule information* (35% strongly agree in 2011 vs. 51% in 2013)
- *Ease of getting answers to issues or concerns* (30% strongly agree in 2011 vs. 41% in 2013)
- *Knowledge of customer service representatives* (31% strongly agree in 2011 vs. 44% in 2013)

Customer service was rated equally favorably among the subgroups.

Potential areas for improvement continue to include the promptness of buses as there was little improvement in this area from 2011 to 2013. Hours of bus service, fare costs, and courteous bus operators and/or trolley security and fare inspectors continue to fall among the lowest rated aspects of MTS service, though they have shown improvement since 2011.

MTS Transit Information Tools

Physical sources of MTS transit information remained the most used tools in 2013, although their usage declined from 2011.

Riders reported using four out of seven physical sources of information less frequently in 2013 than 2011; the Transit Store was the only physical source used significantly more in 2013.

- *Rider Alert onboard flyers* (32% used in 2011 vs. 26% in 2013)
- *Bus and trolley printed schedules* (76% used in 2011 vs. 64% in 2013)
- *Bus stop information signs* (74% used in 2011 vs. 58% in 2013)
- *Regional transit map* (44% used in 2011 vs. 37% in 2013)
- *The Transit Store (First and Broadway)* (24% used in 2011 vs. 29% in 2013)

The MTS website and mobile texting/app were the most used online and phone sources in 2013, and were used significantly more than they had been in 2011.

- *www.sdmts.com website* (31% used in 2011 vs. 39% in 2013)
- *Mobile phone texting/GOI MTS app* (9% used in 2011 vs. 32% in 2013)

Differences in the types of information tools used were largely dependent on household income in 2013.

- Those with lower incomes (<\$25K) were more prone to using signs, printed schedules, and mobile phones
- Those making \$25K-\$49K relied more on mobile phones
- Those making \$50K+ used the MTS website significantly more than other income subgroups

Perceived helpfulness of online and phone sources of MTS transit information showed considerable signs of improvement in 2013. Bus stop information signs were the only physical source that showed improved perceptions.

Notably, riders rated ten out of twelve online and phone sources, along with bus stop signs, as significantly more helpful in 2013 than they had in 2011.

- *www.sdmts.com website* (79% helpful in 2011 vs. 87% in 2013)
- *MTS Trip Planner* (81% helpful in 2011 vs. 90% in 2013)
- *MTS Twitter* (53% helpful in 2011 vs. 67% in 2013)
- *MTS Facebook* (53% helpful in 2011 vs. 64% in 2013)
- *MTS Trolley Renewal email* (52% helpful in 2011 vs. 66% in 2013)
- *www.511sd.com* (76% helpful in 2011 vs. 86% in 2013)
- *Mobile phone texting/GOI MTS app* (76% helpful in 2011 vs. 91% in 2013)
- *Info Express* (74% helpful in 2011 vs. 92% in 2013)
- *511* (74% helpful in 2011 vs. 82% in 2013)
- *TTY/TDD info line* (73% helpful in 2011 vs. 94% in 2013)
- *Bus stop information signs* (86% helpful in 2011 vs. 91% in 2013)

This pattern of improvement was consistent across all subgroups except Premium bus riders which showed no improvement in their perceptions of helpfulness of online and phone sources.

MTS Projects and Initiatives

At least 90% of riders were satisfied with all of the improvements that were implemented as of 2013.

Installation of security cameras, rated as one of the most important initiatives in 2011, was one of the highest rated improvements in 2013. Riders also indicated high satisfaction with the ability to get arrival time via their mobile phone and with the increased number of low floor buses.

- *Installation of security cameras on all bus and trolley vehicles* (97% very satisfied or satisfied in 2013)
- *Use mobile phone to get real time arrival for next bus or trolley* (97% very satisfied or satisfied in 2013)
- *Increased number of low-floor buses* (98% very satisfied or satisfied in 2013)

Riders generally found the initiatives proposed in 2011 that were not completed by 2013 more important in 2013.

Four out of five initiatives proposed in both years were rated as more important by riders in 2013 than in 2011.

- *Real time trolley arrival signs at all the trolley stations* (59% very important in 2011 vs. 66% in 2013)
- *Future I-15 bus rapid transit routes* (44% very important in 2011 vs. 51% in 2013)
- *Future Mid-City Bus Rapid Transit routes* (42% very important in 2011 vs. 52% in 2013)
- *Future Mid-Coast Trolley extension to University City/UCSD* (45% very important in 2011 vs. 55% in 2013)

Real time trolley arrival signs continued to be rated as one of the top two most important initiatives while ordering Clean Natural Gas buses, a new initiative proposed in 2013, also received high ratings.

MTS projects and improvements that were most important to riders in 2013 were:

- *Real time trolley arrival signs at all the trolley stations* (92% very important or important)
- *Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses* (92% very important or important)

In comparing subgroups:

- Females were generally more concerned with future I-15 and Mid-City Bus Rapid Transit routes
- Younger (<35 years old) riders were more concerned with real time trolley arrival signs at all trolley stations and the ability to purchase a Day Pass using a mobile smart phone
- Improvements to the trolley services and mid-city bus routes were of particular importance to Hispanics

Why Ride Public Transit

Key reasons for taking public transit in 2013 were:

- *Save money* (selected as a top-three reason by 73%)
- *No car to use* (selected as a top-three reason by 66%)
- *Price of fuel* (selected as a top-three reason by 38%)

Overall, riders were less likely to include *better for environment* in their top three reasons for taking public transit in 2013 than they were in 2011.

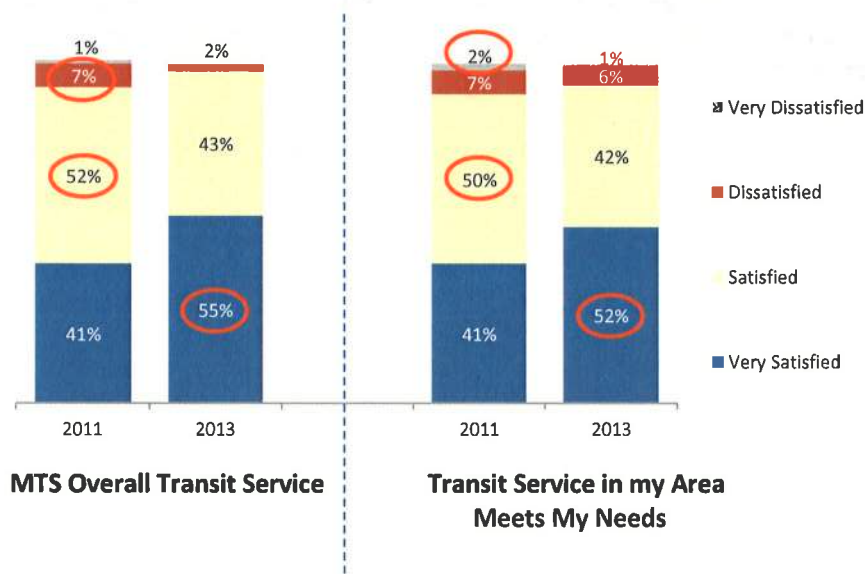
In comparing subgroups:

- Premium bus riders and those making \$50K+ were more likely to ride transit to *avoid traffic*
- Premium bus riders were also more likely to ride transit because it is *better for the environment*
- South Bay riders, females, teens, African Americans and those making <\$15K were more likely to have *no driver's license*

Section 3: Detailed Findings - Overall

As in 2011, overall satisfaction with MTS in 2013 was high, with over 90% of respondents indicating they were either very satisfied or satisfied with *MTS overall transit service* and with *transit service in my area meets my needs* (98% and 94%, respectively). Notably, significantly more respondents were very satisfied with these characteristics of MTS in 2013 compared to 2011.

Figure 1
Overall Satisfaction with MTS
(Q15. Please indicate your level of satisfaction with the following areas of service.)



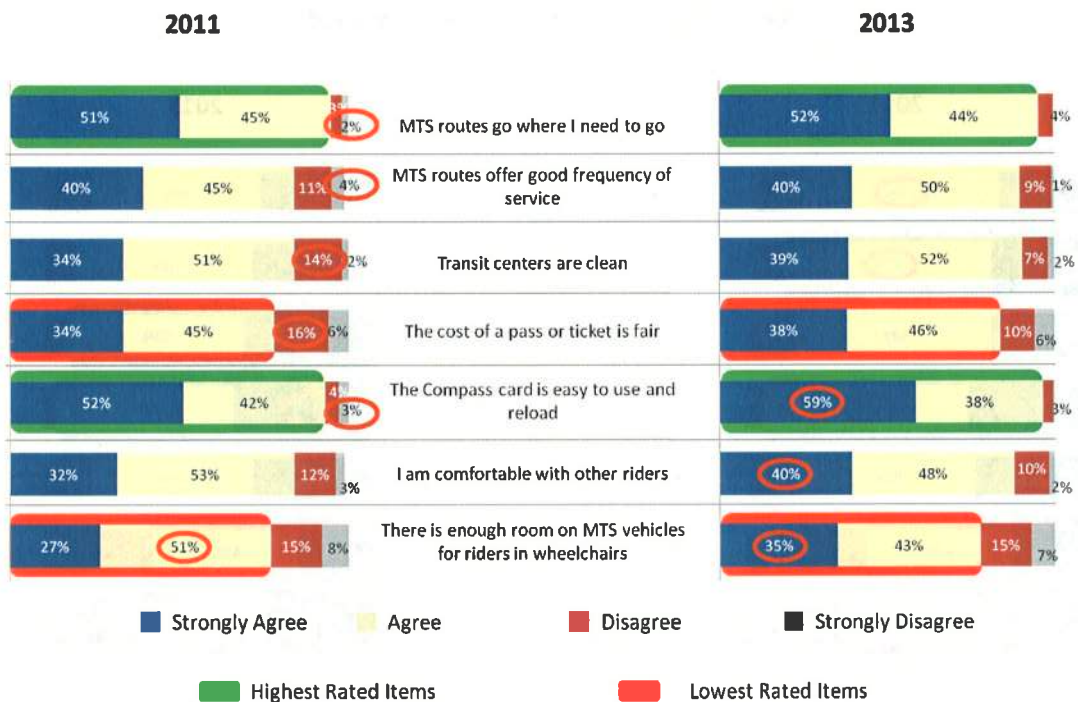
*Note: Some percentages may not add up due to rounding

○ Significantly higher between years

In 2013, riders continued to rate MTS services positively overall, with more than 70% either strongly agreeing or agreeing with each of the statements. As in 2011, riders agreed most strongly with the statements *the Compass card is easy to use and reload* and *MTS routes go where I need to go* in 2013.

MTS services receiving lower agreement scores, the same for both years, were *the cost of a pass or ticket is fair* and *there is enough room on MTS vehicles for riders in wheelchairs*.

Figure 2
Feedback on MTS Overall
(Q10. Please let me know how much you agree or disagree with the following statements.)
Base = All Respondents; Don't use, N/A excluded



*Note: Some percentages may not add up due to rounding

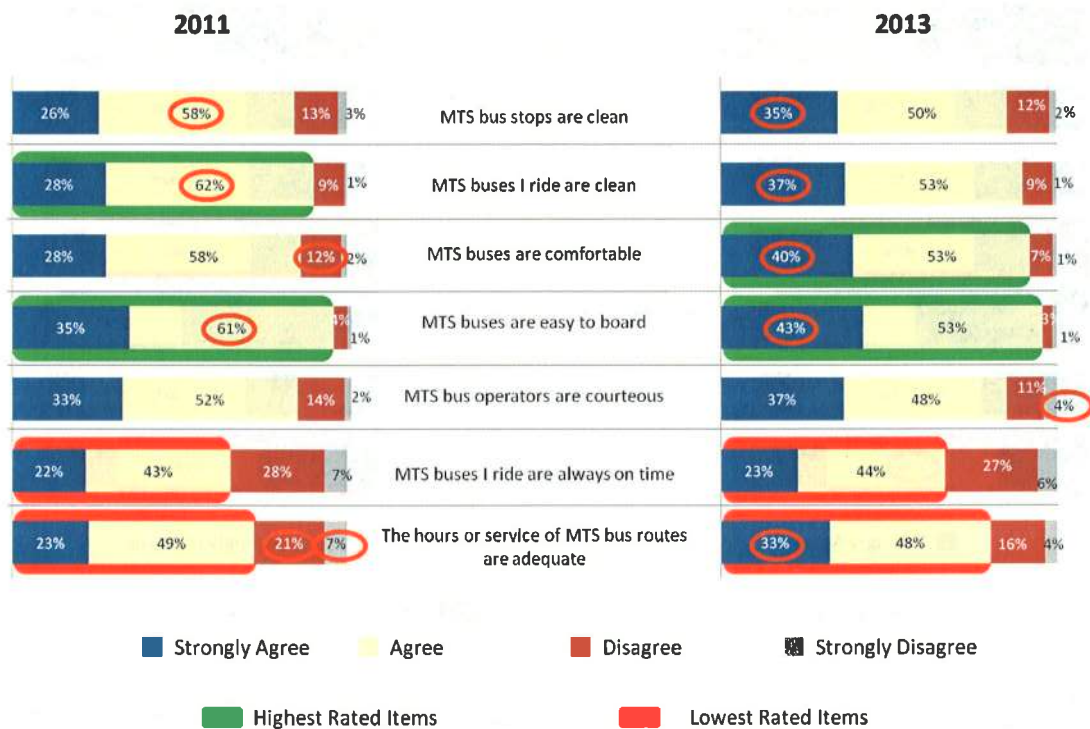
○ Significantly higher between years

Bus service was rated most positively for *MTS buses are easy to board* in both 2011 and 2013, with ratings of *comfortable* surpassing *clean* in 2013.

There was lower agreement with *MTS buses I ride are always on time* and *the hours of service of MTS bus route are adequate*, the same sentiment felt in both years.

Indication that bus service improved overall between 2011 and 2013 was shown by riders being significantly more likely to strongly agree with five out of seven statements tested.

Figure 3
Feedback on MTS Buses
 (Q10. Please let me know how much you agree or disagree with the following statements.)
 Base = Bus Riders; Don't use, N/A excluded



*Note: Some percentages may not add up due to rounding

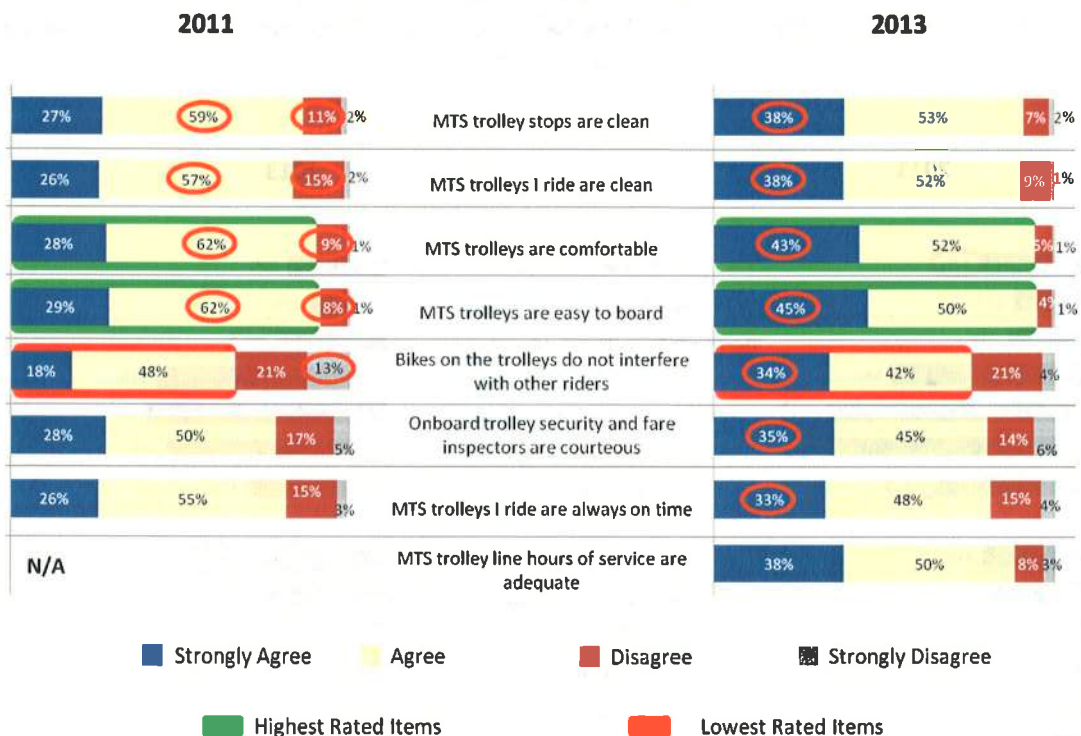
○ Significantly higher between years

MTS trolley operations continued to be rated positively overall, with more than three out of four riders giving good ratings to all statements tested. In both years, riders were most likely to agree with *MTS trolleys are easy to board* and *MTS trolleys are comfortable*.

Trolley riders continued to be least likely to agree with the statement *bikes on the trolleys do not interfere with other riders*.

Indication that trolley service improved overall between 2011 and 2013 was shown by riders being significantly more likely to strongly agree with all of the statements tested in both years.

Figure 4
Feedback on MTS Trolleys
 (Q10. Please let me know how much you agree or disagree with the following statements.)
 Base = Trolley Riders; Don't use, N/A excluded



*Note: Some percentages may not add up due to rounding

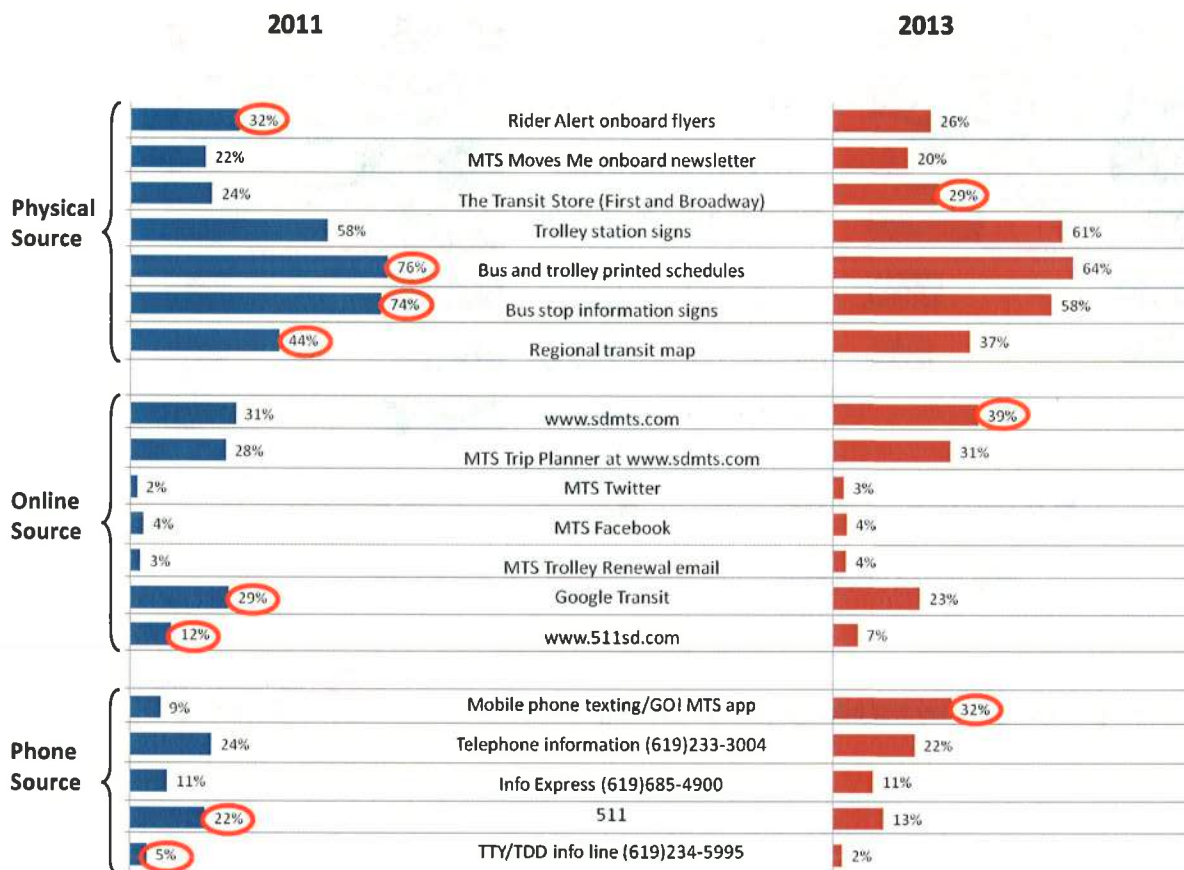
○ Significantly higher between years

Trends in transit information tool usage were very similar in 2011 and 2013, as physical sources of information continued to be the most heavily utilized. In particular, *bus and trolley printed schedules*, *trolley station signs*, and *bus stop information signs* were the most frequently used tools (although they were used significantly less in 2013).

Tools used least frequently (i.e., by less than 5% of riders) continued to be *MTS Twitter*, *MTS Facebook*, *MTS trolley renewal email*, and *TTY/TDD info line (619) 234-5995*.

Sources of information used significantly more in 2013 included *The Transit Store (First and Broadway)*, *www.sdmts.com* website, and the *mobile phone texting/GO! MTS app*. Given that two out of these three sources are either online or phone, there is indication that a trend may be developing in riders becoming more open to using less traditional, non-physical sources of information.

Figure 5
Use of Transit Information Tools
 (Q11. Please let me know if you use each of the following transit information tools and how helpful they are.)



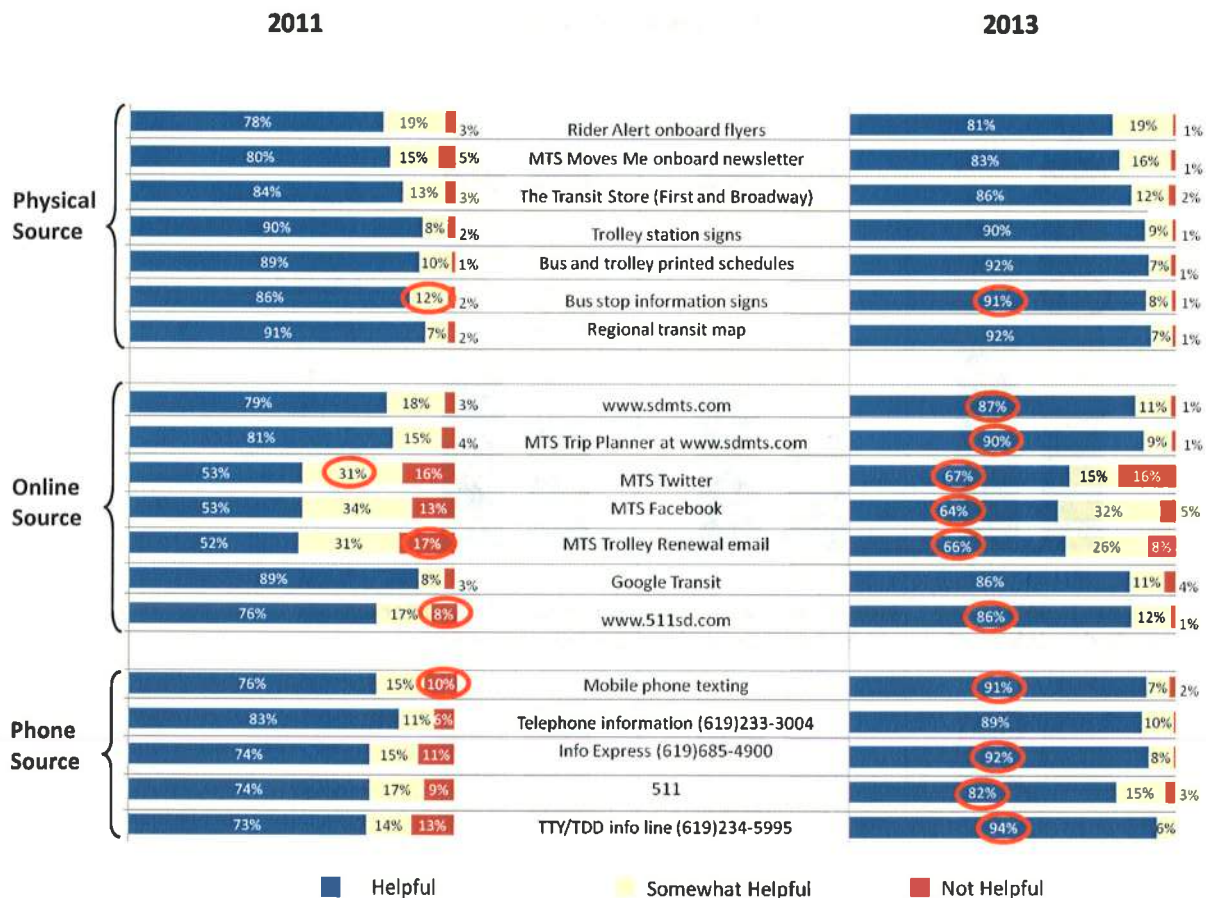
Significantly higher between years

Overall, information tools continued to be perceived as helpful in 2013. Specifically, with the exception of *MTS Twitter*, *MTS Facebook*, and *MTS trolley renewal email*, over 80% of riders found each tool helpful when used. *TTY/TDD info line (619) 234-5995*, *Info Express (619) 685-4900*, and the *regional transit map* were found to be most helpful.

Compared to 2011, riders were significantly more satisfied with six out of seven online sources and four out of five phone sources tested, indicating that MTS has improved on information tools made available for computers, tablets, and phones in the past two years.

Regarding physical information tools, riders in 2013 were significantly more satisfied with the *bus stop information signs* than in 2011.

Figure 6
Helpfulness of Transit Information Tools
 (Q11. Please let me know if you use each of the following transit information tools and how helpful they are.)



*Note: Some percentages may not add up due to rounding

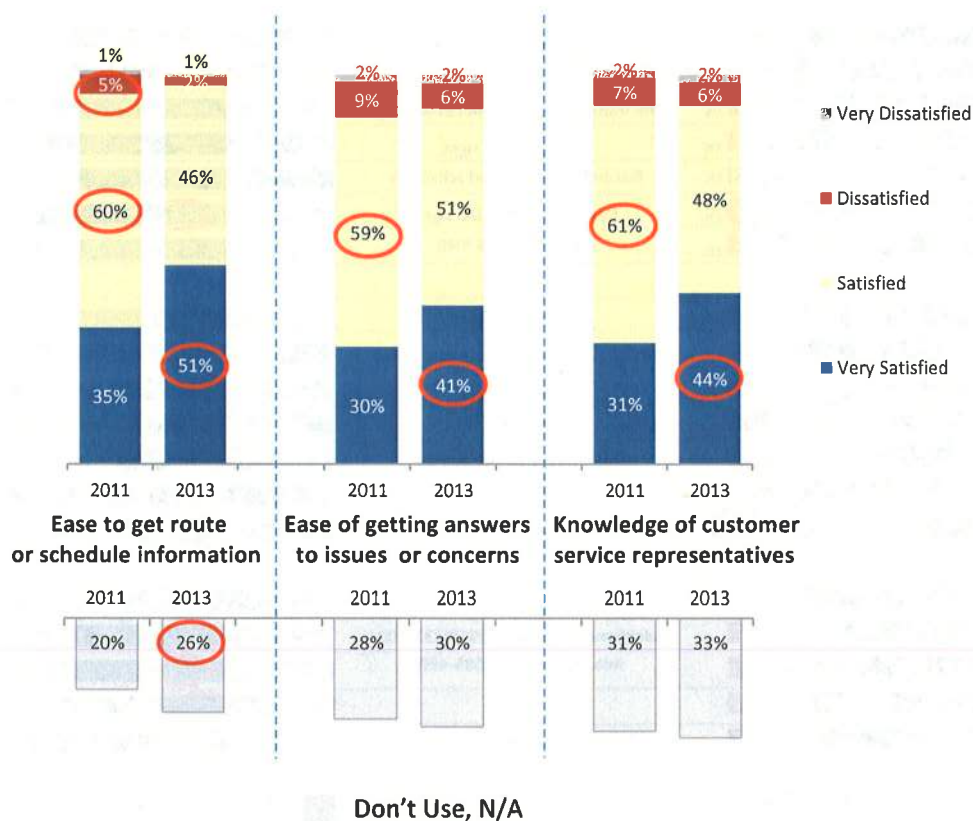
Significantly higher between years

Riders were again satisfied with the various aspects of MTS' customer service, with more than 90% rating all three statements positively. *Ease to get route or schedule information* was rated most favorably in both years.

Notably, satisfaction with customer service showed significant improvement between 2011 and 2013, with riders now significantly more likely to be very satisfied with all aspects tested.

The scores shown on the bottom axis reflect the percentage of respondents selecting the answer choice *Don't use / N/A* (as mentioned previously, these responses were excluded from the percentage base in the graph on the top axis); between 26% and 33% selected this answer choice in 2013.

Figure 7
Satisfaction with Customer Service
(Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service.)
Don't use, N/A excluded



*Note: Some percentages may not add up due to rounding

Significantly higher between years

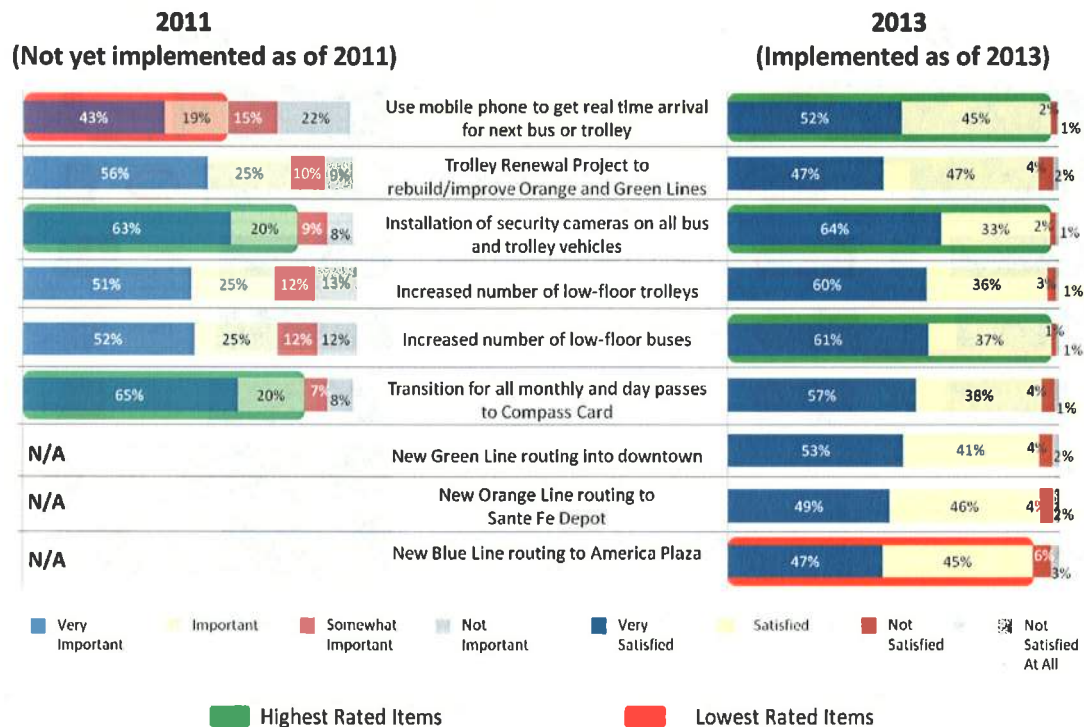
MTS implemented several initiatives to improve the bus and trolley system between 2011 and 2013. Riders responded favorably, with over 90% indicating they were very satisfied or satisfied with all of the improvements.

Riders were particularly satisfied with being able to *use mobile phone to get real time arrival for next bus or trolley*, the *increased number of low-floor buses and trolleys*, and the *installation of security cameras on all buses and trolley vehicles*.

Figure 8

MTS Improvements – Implemented

(Q13a. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives listed below.)
No opinion excluded



*Note: Some percentages may not add up due to rounding

MTS has plans to implement several more projects in the future to improve the bus and trolley system. *Real time trolley arrival signs at all the trolley stations and ordering up to 500 CNG buses to replace the old diesel buses* were the two improvements most important to riders in 2013.

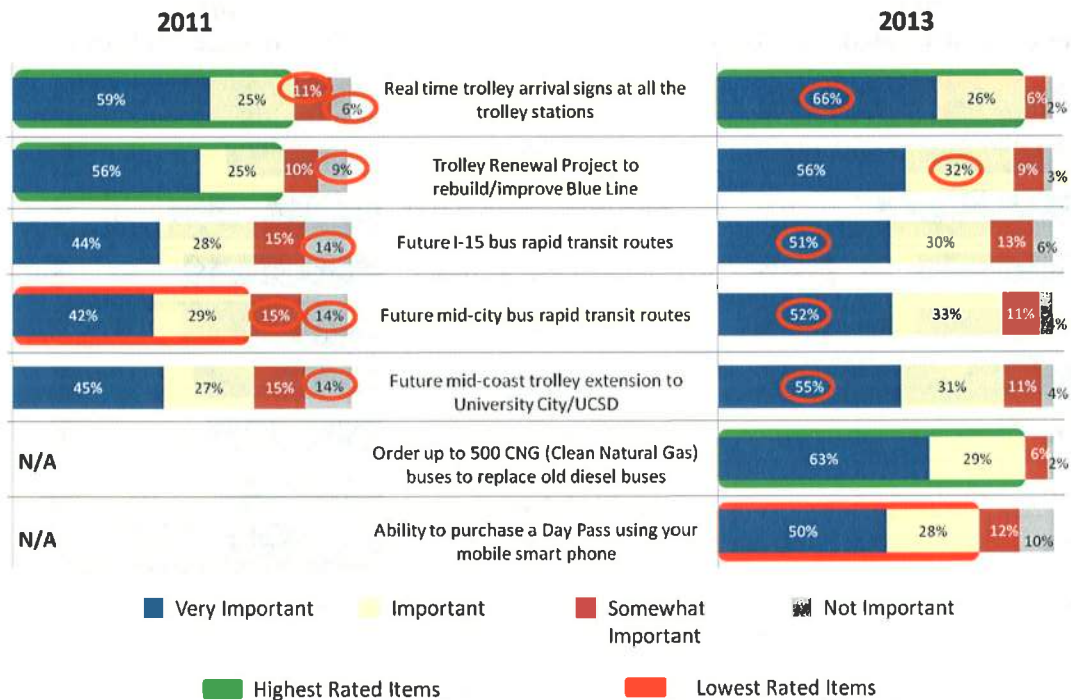
Although the *ability to purchase a Day Pass using a mobile smart phone* was rated least important in 2013, it is likely important to keep this on the “to-do list” given the trend toward increased technology usage in finding transit information.

Figure 9

MTS Improvements – To Be Implemented In The Future

(Q13b. MTS will be completing or implementing a variety of projects in the near future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be.)

No opinion excluded



***Note: Some percentages may not add up due to rounding**

Significantly higher between years

Key reasons why riders were taking public transit in 2013 were to *save money*, because they had *no car to use*, and the *price of fuel*.

No car to use replaced *better for environment* as a top three reason in 2013.

Figure 10
Reasons for Taking Public Transit
(Q14. How important is each of the following in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit	
2011*	2013**
Save Money (94%)	Save Money (73%)
Better for Environment (91%)	No Car to Use (66%)
Price of Fuel (86%)	Price of Fuel (38%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

When asked for additional comments, 4% of riders gave positive comments indicating they liked MTS service. The percentage of those indicating they liked MTS without prompting was down significantly from 2011 (from 8%).

Most improvement suggestions centered on extending and increasing the amount of service (suggested by 3%-7%). Extending service was a particular concern on the weekends (7%). Increasing security (3%) and ensuring buses are on time (3%) were two of the other more frequent suggestions.

Chart 1
Additional Comments or Suggestions about MTS Service or Projects
Overall

Q19. Please let me know if you have any other comments or suggestions about MTS service or projects.*		
	2011	2013
Positive Comments		
Like MTS service/ positive (General)	8%	4%
Negative Comments		
Extended service – Weekends	6%	7%
More frequent service	4%	4%
Extended service - Early morning/Late night	5%	3%
More security	3%	3%
Ensure buses are on time	3%	3%
Rude/Unfriendly operators	3%	2%
More rapid transit routes	0%	2%
Bus/Trolley stops should be cleaner	1%	2%
More bus routes	0%	2%
No comment	55%	63%

For example quotes illustrating the above comments and improvement suggestions see Appendix D.

*Note: Only mentions with 2% or more shown

Section 4: Detailed Findings – Zone-Based Results

By Zone Interviewed In

In this section, MTS evaluation and satisfaction scores are shown by zone in which the ridership satisfaction interview was conducted. In the later part of this section, zones shown reflect the area in which the rider resides regardless of where the actual interview was conducted. ***In the following tables, bold numbers indicate a significantly higher result when comparing zones. A ○ indicates a significantly higher result when comparing years.***

While overall satisfaction with MTS was high across all zones in 2013, riders in the Central Urban zone were significantly more likely to be satisfied (99%) than riders in the East County (96%) or the I-15 Corridor (96%).

Between 2011 and 2013, there was significant improvement in satisfaction in all zones except the South Bay. Riders in the Central Urban and I-15 Corridor zones were significantly more satisfied with *MTS overall transit service*, while those in I-15 Corridor and East County zones were significantly more satisfied with *transit service in my area meets my needs*.

Chart 2
Overall Satisfaction with MTS
By Zone Interviewed In

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS overall transit service	94%	97%	95%	96%	91%	99%	91%	96%
Transit service in my area meets my needs	93%	95%	87%	93%	90%	94%	82%	91%

In 2013, the only differences between zones were related to *the cost of a pass or ticket is fair* and *there is enough room on MTS vehicles for riders in wheelchairs*:

- East County riders were significantly less likely to agree with *the cost of a pass or ticket is fair* than riders in other zones.
- Riders in the I-15 Corridor and East County were significantly more likely to agree with *there is enough room on MTS vehicles for riders in wheelchairs* than those in the South Bay and Central Urban zones.

Perceptions of MTS overall showed some improvement across all zones interviewed in between 2011 and 2013. In particular, those interviewed in the Central Urban zone were significantly more likely to agree with four out of seven characteristics of MTS services.

Chart 3
Feedback on MTS Overall
By Zone Interviewed In

Q10. <u>Feedback on MTS Overall</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS routes go where I need to go	96%	96%	93%	97%	95%	97%	92%	96%
MTS routes offer good frequency of service	91%	89%	82%	87%	83%	91%	78%	86%
Transit centers are clean	89%	90%	82%	88%	82%	91%	91%	88%
The cost of a pass or ticket is fair	81%	85%	79%	76%	77%	85%	86%	85%
The Compass Card is easy to use and reload	93%	97%	94%	96%	92%	97%	96%	95%
I am comfortable with other riders	83%	90%	86%	88%	85%	88%	85%	92%
There is enough room on MTS vehicles for riders in wheelchairs	82%	77%	76%	84%	77%	79%	81%	87%

Satisfaction with MTS bus service in 2013 was highest among riders in the I-15 Corridor, who were significantly more likely to agree with *MTS bus stops are clean*, *MTS buses I ride are clean*, and *MTS bus operators are courteous*.

From 2011 to 2013, agreement with *MTS buses are comfortable* and *the hours of service of MTS bus routes are adequate* showed improvement across all zones.

Chart 4
Feedback on MTS Buses
By Zone Interviewed In

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS bus stops are clean	89%	88%	85%	79%	81%	84%	92%	90%
MTS buses I ride are clean	94%	90%	89%	88%	89%	89%	92%	95%
MTS buses are comfortable	83%	91%	86%	93%	86%	92%	86%	95%
MTS buses are easy to board	95%	96%	95%	94%	95%	96%	97%	96%
MTS bus operators are courteous	80%	87%	90%	82%	85%	83%	87%	93%
MTS buses I ride are always on time	64%	70%	60%	60%	65%	63%	68%	69%
The hours of service of MTS bus routes are adequate	78%	81%	63%	78%	70%	80%	66%	77%

In 2013, there were no significant differences in how riders in different zones rated the MTS trolleys.

However, attitudes toward the trolley service improved between 2011 and 2013, particularly in the Central Urban zone where riders were significantly more likely to agree with five out of the seven statements asked in both years.

Additionally, agreement in 2013 was higher for *MTS trolleys are easy to board* among riders in the I-15 Corridor and *bikes on the transit do not interfere with other riders* among riders in the East County than in 2011.

Chart 5
Feedback on MTS Trolleys
By Zone Interviewed In

Q10. <u>Feedback on MTS Trolleys</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS trolley stations are clean	91%	90%	87%	89%	84%	91%	91%	87%
MTS trolleys I ride are clean	85%	88%	85%	88%	82%	91%	80%	91%
MTS trolleys are comfortable	89%	92%	95%	95%	90%	95%	87%	96%
MTS trolleys are easy to board	90%	94%	92%	95%	90%	96%	88%	97%
Bikes on the transit do not interfere with other riders	69%	74%	65%	77%	65%	76%	68%	81%
Onboard trolley security and fare inspectors are courteous	77%	80%	81%	81%	77%	80%	83%	86%
MTS trolleys I ride are always on time	84%	82%	82%	81%	80%	80%	88%	78%
MTS trolley line hours of service are adequate	N/A	88%	N/A	86%	N/A	89%	N/A	90%

Usage of transit information tools was generally consistent across riders in different zones in 2013, with *bus and trolley printed schedules* and *bus stop information signs* the most utilized sources of information across all zones.

Outside of this general consistency, significant differences were found between riders in each zone for these specific tools:

- I-15 Corridor: less likely than riders in all other zones to use *trolley station signs*; more likely than riders in East County and the South Bay to use the *www.sdmts.com website*
- Central Urban: more likely than riders in East County and the South Bay to use the *www.sdmts.com website*

From 2011 to 2013, there was a noticeable decrease in the use of physical sources. In particular, there were decreases in the use of *bus and trolley printed schedules* and *bus stop information signs* across all zones. Usage decreased for *Rider Alert onboard flyers* in all zones except the I-15 Corridor and for the *regional transit map* in all zones except the South Bay.

Use of online sources increased slightly between 2011 and 2013, particularly among South Bay riders. Specifically, this group was more likely to use the *www.sdmts.com website*, *MTS Trip Planner*, and *MTS Trolley renewal emails* in 2013. Additionally, riders in East County were significantly more likely to use *MTS Twitter* compared to 2011.

Riders in all zones were more likely to use the *mobile phone texting/GO! MTS app* in 2013 than in 2011. It is likely that the decrease in usage of physical sources is related to the convenience and increased openness to use alternative online and phone methods for obtaining information about MTS.

Chart 6
Use of Transit Information Tools
By Zone Interviewed In

Q11. <u>Use of transit information tools</u> - Please let me know if you use each of the following transit information tools.								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source								
Rider Alert onboard flyers	28%	21%	31%	23%	32%	26%	35%	27%
MTS Moves Me onboard newsletter	22%	17%	20%	19%	23%	20%	21%	23%
The Transit Store (First & Broadway)	21%	25%	27%	33%	24%	29%	19%	23%
Trolley station signs	59%	64%	69%	67%	57%	64%	51%	47%
Bus and trolley printed schedules	82%	65%	79%	66%	72%	65%	77%	59%
Bus stop information signs	78%	56%	74%	56%	72%	60%	80%	61%
Regional transit map	39%	35%	51%	36%	45%	38%	45%	35%

Chart 6 (Continued)
Use of Transit Information Tools
By Zone Interviewed In

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Online Source								
www.sdmts.com	19%	34%	29%	31%	36%	39%	38%	40%
MTS Trip Planner at www.sdmts.com	17%	32%	26%	31%	33%	32%	30%	29%
MTS Twitter	1%	3%	1%	4%	3%	3%	0%	2%
MTS Facebook	3%	6%	3%	3%	4%	3%	1%	2%
MTS Trolley Renewal email	1%	6%	2%	3%	4%	3%	0%	2%
Google Transit	26%	22%	23%	23%	30%	24%	35%	25%
www.511sd.com	6%	8%	8%	6%	14%	6%	10%	7%
Phone Source								
Mobile phone texting/GO! MTS app	8%	35%	11%	29%	10%	32%	13%	29%
Telephone information (619)233-3004	20%	22%	23%	27%	26%	23%	19%	22%
Info Express (619)685-4900	7%	9%	10%	15%	13%	12%	10%	8%
511	14%	12%	26%	16%	25%	13%	20%	15%
TTY/TDD info line (619)234-5995	3%	5%	4%	3%	6%	1%	3%	0%

Perceived helpfulness of transit information tools was also very consistent across riders in different zones in 2013. The only differences were:

- Riders in the Central Urban and I-15 Corridor zones were more likely to find the *Rider Alert onboard flyers* helpful than riders in East County, and were likely to find *MTS Moves Me onboard newsletters* more helpful than those in the South Bay
- Riders in East County found *Google Transit* to be more helpful than riders in the South Bay

Strong improvements were seen in helpfulness ratings between 2011 and 2013, particularly for phone and online sources among riders in the South Bay and Central Urban zones.

Chart 7
Helpfulness of Transit Information Tools
By Zone Interviewed In

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source								
Rider Alert onboard flyers	85%	77%	79%	65%	76%	83%	80%	85%
MTS Moves Me onboard newsletter	84%	69%	82%	78%	78%	89%	82%	84%
The Transit Store (First & Broadway)	87%	84%	85%	86%	83%	86%	88%	85%
Trolley station signs	92%	89%	94%	91%	88%	91%	89%	92%
Bus and trolley printed schedules	88%	89%	93%	94%	90%	93%	86%	93%
Bus stop information signs	84%	88%	91%	90%	88%	92%	81%	93%
Regional transit map	91%	92%	95%	91%	90%	93%	88%	90%
Online Source								
www.sdmts.com	76%	84%	90%	88%	80%	90%	83%	88%
MTS Trip Planner at www.sdmts.com	85%	88%	85%	90%	82%	91%	70%	88%
MTS Twitter	27%	56%	61%	86%	58%	75%	19%	57%
MTS Facebook	63%	64%	54%	90%	53%	58%	14%	100%
MTS Trolley Renewal email	30%	69%	69%	74%	58%	65%	31%	100%
Google Transit	89%	82%	92%	92%	88%	87%	91%	92%
www.511sd.com	66%	94%	74%	88%	78%	86%	63%	87%

Chart 7 (Continued)
Helpfulness of Transit Information Tools
By Zone Interviewed In

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Phone Source								
Mobile phone texting/GO! MTS app	79%	94%	88%	89%	72%	91%	87%	95%
Telephone information (619)233-3004	82%	91%	91%	87%	83%	90%	77%	97%
Info Express (619)685-4900	79%	91%	75%	83%	73%	93%	63%	98%
511	74%	86%	74%	80%	74%	85%	70%	78%
TTY/TDD info line (619)234-5995	75%	100%	77%	82%	72%	87%	60%	42%

Few differences were seen in satisfaction with MTS customer service across riders in each zone. The only significant difference seen was among riders in East County, who indicated they were less satisfied with the *ease of getting answers to issues or concerns* than riders in the South Bay and Central Urban zones.

Additionally, few changes in satisfaction with MTS customer service were seen between 2011 and 2013. The only significant difference was seen among riders in the Central Urban zone, who indicated they were significantly more satisfied with the *ease to get route or schedule information*.

Chart 8
Satisfaction with Customer Service
By Zone Interviewed In

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Ease to get route or schedule information	94%	98%	94%	95%	94%	97%	96%	97%
Knowledge of customer service representatives	93%	95%	91%	90%	90%	91%	93%	93%
Ease of getting answers to issues or concerns	90%	94%	89%	86%	88%	92%	91%	89%

Satisfaction levels with improvements implemented between 2011 and 2013 were consistent across riders in all zones.

Chart 9
MTS Improvements – Implemented
By Zone Interviewed In

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below.*								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Use mobile phone to get real time arrival for next bus or trolley	66%	98%	59%	97%	63%	98%	64%	95%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	87%	93%	82%	94%	79%	95%	75%	95%
Installation of security cameras on all bus and trolley vehicles	89%	98%	81%	97%	81%	97%	74%	99%
Increased number of low-floor trolleys	77%	96%	72%	98%	76%	96%	73%	97%
Increased number of low-floor buses	80%	98%	74%	97%	77%	97%	75%	98%
Transition for all monthly and day passes to Compass Card	87%	96%	84%	95%	86%	93%	87%	95%
New Green Line routing into downtown	N/A	95%	N/A	93%	N/A	94%	N/A	95%
New Orange Line routing to Santa Fe Depot	N/A	96%	N/A	93%	N/A	94%	N/A	90%
New Blue Line routing to America Plaza	N/A	92%	N/A	92%	N/A	92%	N/A	91%

* 2011 – not yet implemented as of 2011 (%=Very important or important, no opinion excluded)

2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

Regarding changes to be implemented in the future, riders in the South Bay were more concerned with improvements affecting the trolley lines. Specifically, riders in the South Bay found the *Trolley Renewal Project to rebuild/improve the Blue Line* to be more important than riders in the East County and Central Urban zones.

I-15 Corridor riders were more concerned with improvements to the bus system. Specifically, riders in the I-15 Corridor rated *future I-15 bus rapid transit routes* to be more important than riders in any other zone.

For all improvements that had yet to be implemented in 2011 and 2013, riders in all zones rated them as currently more important than previously.

Chart 10
MTS Improvements – To Be Implemented In The Future
By Zone Interviewed In

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)								
Zone Interviewed In	South Bay		East County		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	86%	95%	82%	92%	84%	91%	78%	88%
Trolley Renewal Project to rebuild/improve the Blue Line	87%	93%	82%	86%	79%	87%	75%	92%
Future I-15 bus rapid transit routes	68%	79%	67%	78%	73%	81%	82%	94%
Future Mid-City Bus Rapid Transit routes	67%	88%	70%	82%	72%	84%	74%	90%
Future Mid-Coast Trolley extension to University City/UCSD	70%	84%	66%	84%	73%	86%	76%	88%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	92%	N/A	88%	N/A	92%	N/A	93%
Ability to purchase a Day Pass using your mobile smart phone	N/A	78%	N/A	76%	N/A	78%	N/A	73%

Across all zones in 2013, *save money* was cited as the most important reason for taking public transit while *no car for use* was cited as the second most important reason for taking public transit. *Price of fuel* was the third most important reason to riders in all zones except riders in South Bay. Riders in South Bay cited *not having a license* as the third most important reason.

The relative importance given to each of the top three reasons was generally consistent between years. One noteworthy difference was that riders in all zones gave more importance to *better for environment* in 2011 and less relative importance to *no car for use*.

Figure 11
Reasons for Taking Public Transit
By Zone Interviewed In
(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit							
South Bay		East County		Central Urban		I-15 Corridor	
2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**
Save Money (97%)	Save Money (71%)	Save Money (94%)	Save Money (72%)	Save Money (93%)	Save Money (72%)	Save Money (91%)	Save Money (76%)
Better for Environment (97%)	No Car to Use (69%)	Better for Environment (92%)	No Car to Use (71%)	Better for Environment (88%)	No Car to Use (68%)	Better for Environment (87%)	No Car to Use (51%)
Price of Fuel (91%)	Do Not Have License (35%)	Price of Fuel (89%)	Price of Fuel (36%)	Price of Fuel (83%)	Price of Fuel (40%)	Price of Fuel (82%)	Price of Fuel (44%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

Strength and Weaknesses by Zone Interviewed In

In general, riders in the **South Bay** continued to rate bus stops as clean in 2013, though the cleanliness ratings for trolley stations were no longer significantly higher than other zones as in 2011. Riders in this zone were also more likely to cite that *MTS buses I ride are always on time*. MTS vehicles, in general, were reported to have less room for wheelchairs than other zones. Though riders in the South Bay continued to report some of the higher overall satisfaction levels among the zones, there was little improvement in satisfaction ratings between 2011 and 2013.

Overall, **East County** riders indicated having among the least overall satisfaction, though there was significant improvement in *MTS transit service meeting their needs* in 2013. Riders in this zone reported being satisfied with the amount of room they have on MTS vehicles for wheelchairs but unsatisfied with several other aspects including:


- *The cost of a pass or ticket is fair*
- *Bus stops are clean*
- *MTS buses I ride are always on time*

Riders in the **Central Urban** zone were among the more satisfied overall with their overall satisfaction showing significant improvement in 2013. They were particularly satisfied with the *cost of a pass or ticket* while being less satisfied with the *room for wheelchairs* and the *cleanliness of the bus stops*. Overall, this zone showed some of the strongest improvements across all aspects since 2011.

Riders in the **I-15 Corridor** were among the least satisfied with *MTS overall service* of those surveyed though overall satisfaction has shown significant improvement since 2011. Despite having lower overall satisfaction, I-15 Corridor riders generally rated specific aspects of MTS service higher than most other zones. This was particularly the case for MTS bus service as they demonstrated some of the highest ratings on the following aspects:

- *MTS bus stops are clean*
- *MTS buses I ride are clean*
- *MTS bus operators are courteous*
- *There is enough room on MTS vehicles for riders in wheelchairs*




By Zone Rider Resides In

For the remainder of this section, zones identified reflect the area in which the riders live. Riders living in rural areas were combined with the East County zone as very few respondents resided in that area. ***In the following tables, bold numbers indicate a significantly higher result when comparing zones. A  indicates a significantly higher result when comparing years.***

Satisfaction with *MTS overall transit service* and *transit service in their area meeting their needs* was consistent across zones in 2013.

Satisfaction with *MTS overall transit service* and *transit service in their area meeting their needs* improved significantly for those living in the Central Urban zone from 2011 to 2013. Satisfaction with *transit service in my area meets my needs* also improved significantly for those living along the I-15 Corridor.

Chart 11
Overall Satisfaction with MTS
By Zone Rider Resides In

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS overall transit service	94%	97%	94%	95%	92%	 97%	91%	96%
Transit service in my area meets my needs	92%	95%	85%	90%	89%	 94%	79%	 89%

Satisfaction with MTS overall service in 2013 was generally consistent across the zones riders reside in. Two noteworthy differences in 2013 included *the cost of a pass or ticket is fair* and *there is enough room on MTS vehicles for wheelchairs*. These two statements were rated higher by those residing in the I-15 Corridor and South Bay.

Improvement from 2011 to 2013 for MTS overall service was primarily demonstrated by those residing in the Central Urban zone where over half of the statements were rated more favorably in 2013 than 2011. Stronger agreement for *transit centers are clean* was demonstrated by riders residing in East County/Rural zones while stronger agreement for *the cost of a pass or ticket is fair* was demonstrated by riders residing in South Bay compared to 2011.

Chart 12
Feedback on MTS Overall
By Zone Rider Resides In

Q10. <u>Feedback on MTS Overall</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS routes go where I need to go	95%	98%	94%	97%	94%	96%	94%	93%
MTS routes offer good frequency of service	88%	90%	82%	87%	82%	88%	81%	88%
Transit centers are clean	86%	90%	82%	89%	83%	88%	94%	89%
The cost of a pass or ticket is fair	79%	86%	80%	83%	77%	76%	90%	92%
The Compass Card is easy to use and reload	94%	97%	92%	95%	94%	97%	98%	94%
I am comfortable with other riders	83%	88%	85%	87%	83%	89%	89%	90%
There is enough room on MTS vehicles for riders in wheelchairs	78%	83%	74%	82%	77%	77%	83%	91%

In 2013, riders residing along the I-15 Corridor were generally more satisfied with MTS bus services than those in residing in the other zones. In particular, riders in the I-15 Corridor were significantly more likely to agree with the statements *MTS buses I ride are clean*, *MTS bus operators are courteous*, and *MTS bus stops are clean* than the majority of other riders.

Few improvements were seen in the attitudes toward MTS bus services between 2011 and 2013. *MTS buses are comfortable* and *the hours of service of MTS bus routes are adequate* were the only two statements that were rated more favorably in 2013 than in 2011, by riders residing in the South Bay and Central Urban zones.

Chart 13
Feedback on MTS Buses
By Zone Rider Resides In

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS bus stops are clean	88%	86%	87%	80%	83%	81%	97%	93%
MTS buses I ride are clean	91%	89%	88%	85%	89%	89%	96%	97%
MTS buses are comfortable	82%	93%	87%	90%	85%	91%	93%	95%
MTS buses are easy to board	95%	98%	97%	95%	94%	93%	99%	96%
MTS bus operators are courteous	80%	84%	89%	80%	84%	85%	90%	96%
MTS buses I ride are always on time	67%	64%	62%	60%	60%	64%	72%	73%
The hours of service of MTS bus routes are adequate	75%	85%	62%	69%	69%	79%	69%	80%

Feedback on MTS trolley service was generally more positive from riders residing along the I-15 Corridor in 2013. Specifically, there was stronger agreement with the statements *MTS trolleys I ride are clean*, *MTS trolleys are comfortable*, and *onboard trolley security and fare inspectors are courteous* from riders residing along the I-15 Corridor than the majority of riders in other zones.

Few improvements were seen in the attitudes toward MTS trolley services between 2011 and 2013. The only differences between zones were for agreement to the statement *MTS trolleys are easy to board* increased significantly among those residing in South Bay and agreement to *bikes on the train do not interfere with other riders* among riders residing in the East County/Rural and Central Urban zones.

Chart 14
Feedback on MTS Trolleys
By Zone Rider Resides In

Q10. Feedback on MTS Trolleys - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS trolley stations are clean	86%	89%	87%	91%	87%	90%	92%	81%
MTS trolleys I ride are clean	80%	87%	84%	90%	82%	89%	85%	96%
MTS trolleys are comfortable	87%	92%	95%	96%	91%	94%	93%	100%
MTS trolleys are easy to board	88%	96%	94%	94%	90%	95%	97%	94%
Bikes on the transit do not interfere with other riders	68%	72%	64%	79%	64%	77%	74%	66%
Onboard trolley security and fare inspectors are courteous	77%	77%	84%	82%	77%	78%	90%	95%
MTS trolleys I ride are always on time	84%	81%	84%	81%	81%	78%	91%	86%
MTS trolley lines hours of service are adequate	N/A	89%	N/A	86%	N/A	86%	N/A	93%

Usage of transit information tools was generally consistent across riders residing in different zones in 2013, with *bus and trolley printed schedules*, *bus stop information signs*, and *trolley station signs* the most utilized sources of information across all zones.

Outside of this general consistency, significant differences were found between riders in each zone for these specific tools:

- I-15 Corridor: less likely than riders residing in all other zones to use *bus and trolley printed schedules* and *trolley station signs*; more likely than riders in East County and the Central Urban zone to use the *MTS Moves Me onboard newsletter*, *regional transit map*, and *www.sdmts.com website*
- Central Urban: more likely than riders residing in the South Bay to use *telephone information*, *Info Express*, and *511*; more likely than riders residing along the I-15 Corridor to use *Info Express* and *mobile phone texting/GO! MTS app*

From 2011 to 2013, there was a noticeable decrease in the use of physical sources and a noticeable increase in the use of phone and online sources. In particular, there were decreases in the use of *bus and trolley printed schedules* and *bus stop information signs* across all zones and increases in the use of *mobile phone texting/GO! MTS app* in all zones.

Chart 15
Use of Transit Information Tools
By Zone Rider Resides In

Q11. <u>Use of transit information tools</u> - Please let me know if you use each of the following transit information tools.								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source								
Rider Alert onboard flyers	31%	21%	33%	25%	33%	25%	31%	28%
MTS Moves Me onboard newsletter	23%	18%	19%	21%	24%	18%	19%	30%
The Transit Store (First & Broadway)	22%	22%	25%	32%	27%	30%	13%	22%
Trolley station signs	58%	63%	69%	68%	60%	63%	42%	41%
Bus and trolley printed schedules	78%	68%	81%	65%	77%	67%	74%	55%
Bus stop information signs	74%	56%	75%	62%	77%	59%	79%	65%
Regional transit map	39%	32%	47%	40%	47%	37%	47%	44%

Chart 15 (Continued)
Use of Transit Information Tools
By Zone Rider Resides In

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Online Source								
www.sdmts.com	24%	36%	31%	38%	35%	33%	39%	45%
MTS Trip Planner at www.sdmts.com	22%	33%	26%	34%	31%	31%	33%	31%
MTS Twitter	1%	1%	2%	6%	2%	3%	2%	2%
MTS Facebook	3%	4%	3%	5%	4%	3%	1%	1%
MTS Trolley Renewal email	2%	4%	1%	4%	3%	3%	1%	1%
Google Transit	26%	21%	22%	23%	32%	27%	33%	29%
www.511sd.com	8%	7%	6%	7%	12%	6%	13%	12%
Phone Source								
Mobile phone texting/GO! MTS app	8%	32%	9%	33%	12%	35%	12%	23%
Telephone information (619)233-3004	24%	20%	23%	23%	24%	28%	16%	20%
Info Express (619)685-4900	9%	8%	8%	14%	14%	13%	8%	5%
511	17%	10%	22%	15%	26%	16%	19%	15%
TTY/TDD info line (619)234-5995	4%	2%	3%	4%	6%	2%	2%	<1%

In 2013, ratings for helpfulness of transit information tools were largely consistent across riders residing in all zones. The one exception to this was found among riders along the I-15 Corridor, who found the *MTS Moves Me onboard newsletter* more helpful than riders residing in other zones.

Residents in the South Bay and Central Urban zones were significantly more likely to find the transit information tools helpful in 2013 than in 2011, as each rated around half of the tools more favorably in 2013.

Chart 16
Helpfulness of Transit Information Tools
By Zone Rider Resides In

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source								
Rider Alert onboard flyers	77%	74%	89%	65%	75%	80%	81%	83%
MTS Moves Me onboard newsletter	78%	75%	88%	78%	78%	85%	79%	91%
The Transit Store (First & Broadway)	82%	84%	89%	89%	83%	89%	92%	85%
Trolley station signs	88%	91%	93%	89%	89%	92%	95%	91%
Bus and trolley printed schedules	85%	91%	94%	93%	88%	93%	90%	89%
Bus stop information signs	81%	91%	92%	90%	86%	91%	82%	89%
Regional transit map	87%	88%	95%	96%	90%	93%	90%	87%

Chart 16 (Continued)
Helpfulness of Transit Information Tools
By Zone Rider Resides In

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Online Source								
www.sdmts.com	78%	87%	86%	90%	80%	88%	84%	92%
MTS Trip Planner at www.sdmts.com	84%	94%	86%	92%	79%	89%	67%	86%
MTS Twitter	20%	52%	63%	85%	44%	82%	100%	15%
MTS Facebook	56%	68%	48%	77%	44%	77%	100%	100%
MTS Trolley Renewal email	43%	34%	31%	81%	49%	96%	100%	100%
Google Transit	87%	85%	86%	92%	91%	91%	94%	88%
www.511sd.com	67%	100%	75%	94%	71%	85%	74%	88%
Phone Source								
Mobile phone texting/GO! MTS app	74%	97%	80%	86%	76%	92%	95%	94%
Telephone information (619)233-3004	80%	92%	85%	89%	83%	90%	91%	96%
Info Express (619)685-4900	72%	92%	68%	89%	70%	89%	84%	100%
511	78%	88%	76%	86%	70%	85%	78%	77%
TTY/TDD info line (619)234-5995	68%	100%	69%	89%	68%	100%	100%	0%

Satisfaction with MTS customer service was consistent across zones riders resided in 2013. No significant changes were demonstrated between the ratings given in 2011 and those given in 2013.

Chart 17
Satisfaction with Customer Service
By Zone Rider Resides In

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Ease to get route or schedule information	94%	98%	93%	97%	94%	96%	96%	98%
Knowledge of customer service representatives	90%	94%	91%	91%	92%	91%	92%	86%
Ease of getting answers to issues or concerns	89%	92%	89%	86%	89%	91%	92%	87%

Satisfaction levels with improvements implemented between 2011 and 2013 were lower for riders residing in the Central Urban zone, particularly for:

- *Installation of security cameras on all bus and trolley vehicles* compared to East County/Rural and I-15 Corridor
- *Trolley Renewal Project to rebuild/improve the Orange and Green Lines* compared to East County/Rural
- *New Orange Line routing to Santa Fe Depot* compared to the South Bay

Riders residing in East County were significantly more satisfied than all other residents with the *increased number of low-floor trolleys*.

Chart 18
MTS Improvements – Implemented
By Zone Rider Resides In

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below.*								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Use mobile phone to get real time arrival for next bus or trolley	67%	99%	63%	98%	61%	97%	66%	95%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	84%	94%	84%	97%	80%	92%	69%	90%
Installation of security cameras on all bus and trolley vehicles	88%	98%	81%	99%	80%	96%	76%	99%
Increased number of low-floor trolleys	76%	95%	72%	100%	74%	97%	73%	92%
Increased number of low-floor buses	78%	97%	74%	98%	75%	97%	76%	97%
Transition for all monthly and day passes to Compass Card	83%	95%	86%	96%	87%	93%	89%	96%
New Green Line routing into downtown	N/A	94%	N/A	95%	N/A	92%	N/A	95%
New Orange Line routing to Santa Fe Depot	N/A	97%	N/A	95%	N/A	91%	N/A	85%
New Blue Line routing to America Plaza	N/A	92%	N/A	93%	N/A	91%	N/A	86%

* 2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)

2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

Regarding changes to be implemented in the future, riders residing in each of the zones were largely in agreement about the importance of each. Some differences included:

- I-15 Corridor: believed incorporating real time trolley arrival signs at all trolley stations was significantly less important than residents of all other zones
- East County/Rural: believed the Trolley Renewal Project to rebuild/improve the Blue Line was significantly less important than residents in East County/Rural; believed that ordering up to 500 CNG buses to replace old diesel buses was significantly less important than residents in the Central Urban zone.

For all improvements that had yet to be implemented in 2011 and 2013, riders in all zones rated them as currently more important than previously. This was particularly true for riders residing in the South Bay and Central Urban zones.

Chart 19
MTS Improvements – To Be Implemented In The Future
By Zone Rider Resides In

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)								
Zone Rider Resides In	South Bay		East County/Rural		Central Urban		I-15 Corridor	
	2011	2013	2011	2013	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	83%	94%	85%	92%	84%	91%	72%	81%
Trolley Renewal Project to rebuild/improve the Blue Line	84%	92%	84%	81%	80%	90%	69%	88%
Future I-15 bus rapid transit routes	73%	78%	69%	77%	73%	83%	80%	89%
Future Mid-City Bus Rapid Transit routes	67%	88%	73%	80%	74%	84%	71%	86%
Future Mid-Coast Trolley extension to University City/UCSD	71%	83%	67%	88%	74%	87%	73%	84%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	91%	N/A	87%	N/A	93%	N/A	92%
Ability to purchase a Day Pass using your mobile smart phone	N/A	82%	N/A	70%	N/A	74%	N/A	70%

Across riders residing in all zones in 2013, *save money* was cited as the most important reason for taking public transit while *no car for use* was cited as the second most important reason for taking public transit. *Price of fuel* was the third most important reason to riders residing in all zones.

The relative importance given to each of the top three reasons was generally consistent between years. One noteworthy difference was that riders residing in all zones gave more importance to *better for environment* in 2011 compared to *no car for use*.


Figure 12
Reasons for Taking Public Transit
By Zone Resides In
(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit							
South Bay		East County/Rural		Central Urban		I-15 Corridor	
2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**
Save Money (94%)	Save Money (72%)	Save Money (95%)	Save Money (71%)	Save Money (93%)	Save Money (70%)	Save Money (91%)	Save Money (80%)
Better for Environment (92%)	No Car to Use (69%)	Better for Environment (90%)	No Car to Use (67%)	Better for Environment (92%)	No Car to Use (65%)	Better for Environment (85%)	No Car to Use (44%)
Price of Fuel (89%)	Price of Fuel (39%)	Price of Fuel (87%)	Price of Fuel (35%)	Price of Fuel (85%)	Price of Fuel (38%)	Price of Fuel (83%)	Price of Fuel (54%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.



**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

Section 5: Detailed Findings – General Transportation Mode

In this section, subgroup differences between different general modes of transportation (i.e., bus vs. trolley) are reviewed and analyzed. **Bold numbers indicate significantly higher results between transportation modes. A  indicates a significantly higher result when comparing years.**

Satisfaction with *MTS overall transit service* and *transit service in my area is meeting my needs* was consistent across those interviewed on the bus and the trolley in 2013. Satisfaction with *MTS overall transit service* showed significant improvement from 2011 to 2013 for riders of both modes of transportation.

Chart 20
Overall Satisfaction with MTS
By General Transportation Mode

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)				
General Transportation Mode	Bus		Trolley	
	2011	2013	2011	2013
MTS overall transit service	92%	 98%	92%	 98%
Transit service in my area meets my needs	90%	94%	90%	94%

Feedback on MTS overall was consistent between those interviewed on the bus and trolley in 2013.

Significant increases between 2011 and 2013 were seen for:

- Bus: *transit centers are clean, the cost of a pass or ticket is fair, and the Compass card is easy to use and reload*
- Trolley: *MTS routes offer good frequency of service and transit centers are clean*

Chart 21
Feedback on MTS Overall
By General Transportation Mode

Q10. Feedback on MTS Overall – Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
General Transportation Mode	Bus		Trolley	
	2011	2013	2011	2013
MTS routes go where I need to go	95%	95%	95%	97%
MTS routes offer good frequency of service	84%	90%	83%	90%
Transit centers are clean	84%	92%	82%	89%
The cost of a pass or ticket is fair	78%	84%	78%	84%
The Compass Card is easy to use and reload	94%	97%	93%	96%
I am comfortable with other riders	85%	89%	84%	86%
There is enough room on MTS vehicles for riders in wheelchairs	77%	79%	77%	77%

In 2013, attributes related to bus service were rated equally favorably by those interviewed on MTS buses and trolleys.

Both those interviewed on bus and trolley indicated some increase in satisfaction with MTS bus service from 2011 to 2013. In particular, riders on both modes of transportation showed stronger agreement to the statements *MTS buses are comfortable* and *the hours of service of MTS bus routes are adequate*.

Chart 22
Feedback on MTS Buses
By General Transportation Mode

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
General Transportation Mode	Bus		Trolley	
	2011	2013	2011	2013
MTS bus stops are clean	84%	86%	81%	83%
MTS buses I ride are clean	91%	91%	89%	88%
MTS buses are comfortable	86%	93%	84%	90%
MTS buses are easy to board	96%	97%	95%	93%
MTS bus operators are courteous	84%	86%	83%	84%
MTS buses I ride are always on time	65%	68%	61%	63%
The hours of service of MTS bus routes are adequate	71%	81%	70%	79%

Ratings for attributes related to the MTS trolley service were consistent between riders interviewed on the bus and the trolley in 2013.

Attitudes toward trolley service showed strong signs of improvement from 2011 to 2013, particularly for those interviewed on the bus. Specifically, bus riders responded more favorably to four out of seven attributes tested in 2013 than they had in 2011. Riders interviewed on both the bus and the trolley gave significantly higher ratings in 2013 to both the statement *MTS trolleys I ride are clean* and the statement *bikes on the transit do not interfere with other riders* than they had in 2011.

Chart 23
Feedback on MTS Trolleys
By General Transportation Mode

Q10. Feedback on MTS Trolleys - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
General Transportation Mode	Bus		Trolley	
	2011	2013	2011	2013
MTS trolley stations are clean	86%	91%	87%	90%
MTS trolleys I ride are clean	83%	90%	83%	91%
MTS trolleys are comfortable	90%	95%	91%	93%
MTS trolleys are easy to board	91%	94%	91%	96%
Bikes on the transit do not interfere with other riders	67%	76%	66%	75%
Onboard trolley security and fare inspectors are courteous	77%	79%	77%	82%
MTS trolleys I ride are always on time	82%	83%	82%	79%
MTS trolley lines hours of service are adequate	N/A	89%	N/A	87%

In 2013, riders interviewed on both the bus and the trolley were most likely to use *bus and trolley printed schedules, bus stop information signs, and trolley station signs*. However, use of *bus and trolley printed schedules* and *bus stop information signs* were down significantly from 2011 for both subgroups.

In fact, use of multiple transit information tools were significant down in 2013 compared to 2011, particularly for bus riders. The only significant increases were for bus riders using *www.sdmts.com* and for riders of both modes using *mobile phone texting /GO! MTS app*.

Chart 24
Use of Transit Information Tools
By General Transportation Mode

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.				
General Transportation Mode	Bus		Trolley	
	2011	2013	2011	2013
Physical Source				
Rider Alert onboard flyers	31%	28%	31%	23%
MTS Moves Me onboard newsletter	22%	20%	21%	20%
The Transit Store (First & Broadway)	25%	28%	27%	29%
Trolley station signs	58%	58%	62%	67%
Bus and trolley printed schedules	78%	64%	76%	64%
Bus stop information signs	76%	62%	73%	53%
Regional transit map	45%	36%	45%	37%
Online Source				
www.sdmts.com	32%	42%	32%	34%
MTS Trip Planner at www.sdmts.com	29%	32%	30%	31%
MTS Twitter	3%	3%	3%	2%
MTS Facebook	4%	4%	5%	4%
MTS Trolley Renewal email	3%	3%	3%	4%
Google Transit	29%	25%	29%	21%
www.511sd.com	12%	7%	13%	6%
Phone Source				
Mobile phone texting/GO! MTS app	9%	34%	10%	28%
Telephone information (619)233-3004	25%	19%	27%	27%
Info Express (619)685-4900	12%	9%	12%	14%
511	23%	13%	24%	13%
TTY/TDD info line (619)234-5995	6%	2%	5%	3%

Satisfaction with the helpfulness of transit information tools in 2013 was generally consistent between riders interviewed on bus and trolley. The only difference was for riders interviewed on the bus, who were significantly more likely to find *The Transit Store* helpful than riders interviewed on the trolley.

Perceptions of the helpfulness of online and phone sources improved considerably from 2011 to 2013 for riders interviewed on both modes of transportation. This effect was slightly more evident in riders interviewed on the trolley, as four out of seven online sources and four out of five phone sources were rated significantly more helpful by trolley riders in 2013 than they had been in 2011.

Also noteworthy, *bus stop information signs* were rated more favorably in 2013 than in 2011 by those interviewed on the bus while *MTS Moves Me onboard newsletter* was rated more favorably by riders interviewed on the trolley.

Chart 25
Helpfulness of Transit Information Tools
By General Transportation Mode

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)				
General Transportation Mode	Bus		Trolley	
	2011	2013	2011	2013
Physical Source				
Rider Alert onboard flyers	77%	81%	76%	80%
MTS Moves Me onboard newsletter	78%	81%	76%	85%
The Transit Store (First & Broadway)	85%	90%	84%	79%
Trolley station signs	90%	92%	90%	88%
Bus and trolley printed schedules	89%	93%	89%	90%
Bus stop information signs	86%	92%	87%	89%
Regional transit map	91%	93%	91%	91%
Online Source				
www.sdmts.com	80%	90%	79%	82%
MTS Trip Planner at www.sdmts.com	82%	93%	81%	85%
MTS Twitter	56%	69%	55%	62%
MTS Facebook	54%	62%	54%	67%
MTS Trolley Renewal email	56%	56%	52%	81%
Google Transit	89%	87%	87%	84%
www.511sd.com	74%	86%	74%	90%
Phone Source				
Mobile phone texting/GO! MTS app	75%	93%	74%	87%
Telephone information (619)233-3004	83%	91%	84%	88%
Info Express (619)685-4900	75%	95%	74%	87%
511	73%	78%	74%	89%
TTY/TDD info line (619)234-5995	73%	100%	72%	86%

Satisfaction with MTS customer service was consistent across riders of the bus and trolley in 2013. No significant changes were demonstrated between the ratings given in 2011 and those given in 2013.

Chart 26
Satisfaction with Customer Service
By General Transportation Mode

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)				
General Transportation Mode	Bus		Trolley	
	2011	2013	2011	2013
Ease to get route or schedule information	95%	97%	94%	97%
Knowledge of customer service representatives	91%	92%	90%	93%
Ease of getting answers to issues or concerns	89%	92%	88%	91%

Riders on both the bus and the trolley gave consistently high satisfaction ratings for those improvements made to MTS service from 2011 to 2013. Only the *increase in number of low-floor trolleys* was rated more favorably by bus riders than trolley riders.

Chart 27
MTS Improvements – Implemented
By General Transportation Mode

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below.*				
General Transportation Mode	Bus		Trolley	
	2011*	2013	2011*	2013
Use mobile phone to get real time arrival for next bus or trolley	62%	98%	62%	97%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	81%	93%	83%	95%
Installation of security cameras on all bus and trolley vehicles	84%	98%	85%	96%
Increased number of low-floor trolleys	75%	97%	77%	95%
Increased number of low-floor buses	77%	98%	77%	97%
Transition for all monthly and day passes to Compass Card	85%	95%	86%	93%
New Green Line routing into downtown	N/A	93%	N/A	95%
New Orange Line routing to Santa Fe Depot	N/A	95%	N/A	93%
New Blue Line routing to America Plaza	N/A	92%	N/A	92%

* 2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)

2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

In 2013, the importance given to each of the planned improvements was consistent across those interviewed on the bus and those interviewed on the trolley.

Both bus and trolley riders placed more importance in 2013 than they had in 2011 on nearly all improvements that were planned in 2011 and still pending in 2013.

Chart 28
MTS Improvements – To Be Implemented In the Future
By General Transportation Mode

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)				
General Transportation Mode	Bus		Trolley	
	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	83%	91%	84%	94%
Trolley Renewal Project to rebuild/improve the Blue Line	81%	87%	83%	90%
Future I-15 bus rapid transit routes	72%	83%	70%	79%
Future Mid-City Bus Rapid Transit routes	71%	84%	72%	87%
Future Mid-Coast Trolley extension to University City/UCSD	72%	85%	72%	86%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	92%	N/A	91%
Ability to purchase a Day Pass using your mobile smart phone	N/A	79%	N/A	77%

Across bus and trolley riders in 2013, *save money* was cited as the most important reason for taking public transit while *no car for use* was cited as the second most important reason for taking public transit. *Price of fuel* was the third most important reason to riders of both modes.

One noteworthy difference was that both bus and trolley riders gave more importance to *better for environment* in 2011 and less relative importance to *no car to use*.

Figure 13
Reasons for Taking Public Transit
By General Transportation Mode
(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit			
Bus		Trolley	
2011*	2013**	2011*	2013**
Save Money (95%)	Save Money (74%)	Save Money (94%)	Save Money (70%)
Better for Environment (91%)	No Car to Use (64%)	Better for Environment (90%)	No Car to Use (69%)
Price of Fuel (86%)	Price of Fuel (40%)	Price of Fuel (85%)	Price of Fuel (36%)

***Note:** Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

****Note:** Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

Section 6: Detailed Findings – Specific Transportation Mode

In this section, subgroup differences between different specific modes of transportation (i.e., Local/Express Bus vs. Premium Bus vs. Blue Line vs. Orange Line vs. Green Line) are reviewed and analyzed. **Bold numbers indicate significantly higher results between transportation modes. A O indicates a significantly higher result when comparing years.**

Overall satisfaction ratings were consistent between the riders interviewed on the various modes of transportation in 2013.

Satisfaction of riders from the Local/Express bus routes increased for both *MTS overall transit service* and the *transit service in their area meeting their needs* from 2011 to 2013, while satisfaction for *MTS overall transit service* also increased significantly for riders of the Green Line trolley.

Chart 29
Overall Satisfaction with MTS
By Specific Transportation Mode

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS overall transit service	92%	98%	97%	98%	92%	98%	90%	97%	90%	99%
Transit service in my area meets my needs	90%	94%	95%	90%	90%	96%	89%	94%	89%	91%

Overall, feedback on specific aspects of MTS service was fairly consistent across specific transportation mode sub-groups. Exceptions included:

- Premium bus riders: significantly lower than all other riders for *MTS routes go where I need to go*; significantly lower than Local/Express bus and Orange Line for *I am comfortable with other riders*

Comparing 2011 to 2013, improvements in satisfaction were demonstrated on all modes of transportation except the Premium bus routes. In particular, riders of the Local/Express bus routes rated five out of the seven overall service attributes more favorably in 2013 than in 2011. Also noteworthy, riders of three out of the five modes of transportation were in stronger agreement with the statement *the cost of a pass or ticket is fair* in 2013 than in 2011.

Chart 30
Feedback on MTS Overall
By Specific Transportation Mode

Q10. Feedback on MTS Overall – Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS routes go where I need to go	95%	97%	97%	74%	95%	97%	94%	97%	93%	98%
MTS routes offer good frequency of service	84%	90%	83%	88%	84%	90%	81%	87%	83%	91%
Transit centers are clean	84%	91%	94%	99%	83%	92%	77%	85%	81%	87%
The cost of a pass or ticket is fair	78%	84%	95%	92%	76%	83%	73%	81%	76%	87%
The Compass Card is easy to use and reload	93%	98%	100%	97%	93%	96%	90%	92%	91%	97%
I am comfortable with other riders	85%	91%	99%	74%	83%	87%	82%	91%	83%	81%
There is enough room on MTS vehicles for riders in wheelchairs	78%	80%	64%	71%	76%	77%	72%	77%	70%	77%

In 2013, Premium bus riders indicated higher satisfaction than the majority of other rider groups for five out of the seven bus service attributes tested. Of these, they gave higher satisfaction ratings to the statements *MTS bus stops are clean* and *MTS bus operators are courteous* than riders of all other modes of transportation.

The only improvements in satisfaction with MTS bus service from 2011 to 2013 were demonstrated by those riding the Local/Express buses. Compared to 2011, Local/Express bus riders gave more favorable ratings to *MTS buses are comfortable* and *the hours of service of MTS bus routes are adequate* in 2013.

Chart 31
Feedback on MTS Buses
By Specific Transportation Mode

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS bus stops are clean	84%	85%	89%	100%	81%	88%	78%	80%	77%	77%
MTS buses I ride are clean	91%	89%	100%	100%	89%	89%	87%	90%	87%	85%
MTS buses are comfortable	86%	92%	100%	100%	85%	90%	81%	95%	82%	85%
MTS buses are easy to board	96%	96%	100%	99%	95%	96%	95%	90%	94%	91%
MTS bus operators are courteous	84%	84%	99%	100%	82%	85%	79%	86%	83%	82%
MTS buses I ride are always on time	64%	65%	87%	90%	61%	66%	54%	65%	58%	56%
The hours of service of MTS bus routes are adequate	70%	80%	93%	86%	70%	84%	67%	76%	64%	72%

MTS trolley service ratings were generally consistent across riders of varying modes of transportation in 2013. Two exceptions were:

- Orange Line riders: significantly less likely to agree with *MTS Trolley stations are clean* compared to all other riders; significantly more likely to agree that *bikes on the trolleys do not interfere with other riders* than Blue Line riders

Ratings given to the trolley service attributes improved moderately from 2011 to 2013. The only statement tested in both years that was not given more favorable ratings in 2013 by any of the rider groups was *MTS trolleys I ride are always on time*. Multiple rider groups gave significantly more favorable ratings to the statements *MTS trolleys I ride are clean* and *bikes on the transit do not interfere with other riders*.

Note: Premium bus riders were excluded from analysis due to low base size (n=4).

Chart 32
Feedback on MTS Trolleys
By Specific Transportation Mode

Q10. Feedback on MTS Trolleys - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS trolley stations are clean	87%	91%	76%	98%	86%	94%	85%	79%	86%	92%
MTS trolleys I ride are clean	83%	90%	73%	100%	83%	91%	82%	87%	84%	92%
MTS trolleys are comfortable	90%	95%	97%	100%	89%	93%	91%	92%	90%	93%
MTS trolleys are easy to board	91%	94%	100%	99%	89%	96%	90%	96%	91%	97%
Bikes on the transit do not interfere with other riders	67%	76%	76%	99%	65%	72%	64%	85%	63%	72%
Onboard trolley security and fare inspectors are courteous	77%	79%	97%	99%	76%	80%	71%	81%	77%	86%
MTS trolleys I ride are always on time	82%	83%	76%	98%	81%	82%	80%	74%	82%	76%
MTS trolley lines hours of service are adequate	N/A	89%	N/A	99%	N/A	90%	N/A	84%	N/A	83%

Across all types of riders, physical sources of information such as *bus and trolley printed schedules, bus information signs, and trolley station signs* continued to be the most used transit information tools in 2013. Aside from this however, types of sources used varied by sub-group:

- Green Line riders: were more likely to use the *MTS Moves Me onboard newsletter* when compared to the other two trolley lines; were also more likely to use the *www.sdmts.com website, the regional transit map, and the Transit Store* than Blue Line riders
- Orange Line riders: were generally more likely to use *Info Express*
- Local/Express bus riders: were significantly more likely to use *trolley station signs* and *mobile phone texting/GO! MTS app* than Premium bus riders; were significantly less likely to use the *www.sdmts.com website* than Premium bus riders
- Premium bus riders: were the least likely to use *trolley station signs* and more likely to use the *www.sdmts.com website* than the majority of other riders

From 2011 to 2013, *bus and trolley printed schedules* and *bus stop information signs* saw a significant decrease in use by Local/Express bus riders and Blue and Green Line trolley riders. *Bus and trolley printed schedules* also saw a considerable decline in use by Premium bus riders during this period. Also noteworthy, riders on all trolley lines decreased their use of 511 significantly from 2011 to 2013.

All riders except those interviewed on the Premium buses indicated a significant increase from 2011 to 2013 in their use of the *mobile phone texting/GO! MTS app*. Premium bus riders instead demonstrated a significant increase in their use of the *www.sdmts.com website* while both Blue and Orange Line trolley riders demonstrated an increase in their reliance on *trolley station signs*.

Chart 33
Use of Transit Information Tools
By Specific Transportation Mode

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source										
Rider Alert onboard flyers	30%	25%	49%	49%	31%	18%	30%	28%	32%	28%
MTS Moves Me onboard newsletter	22%	19%	16%	32%	21%	15%	19%	19%	21%	31%
The Transit Store (First & Broadway)	25%	27%	17%	36%	29%	23%	31%	35%	30%	36%
Trolley station signs	58%	63%	40%	12%	60%	66%	64%	76%	67%	63%
Bus and trolley printed schedules	78%	67%	90%	39%	76%	60%	76%	74%	79%	63%
Bus stop information signs	77%	64%	62%	44%	73%	48%	73%	58%	75%	56%
Regional transit map	45%	38%	42%	25%	46%	30%	46%	42%	50%	46%

Chart 33 (Continued)
Use of Transit Information Tools
By Specific Transportation Mode

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Online Source										
www.sdmts.com	32%	38%	32%	74%	31%	29%	32%	30%	39%	45%
MTS Trip Planner at www.sdmts.com	30%	33%	24%	22%	28%	29%	32%	32%	38%	32%
MTS Twitter	2%	3%	11%	3%	3%	3%	3%	5%	3%	--
MTS Facebook	4%	4%	0%	0%	5%	5%	5%	5%	5%	1%
MTS Trolley Renewal email	3%	4%	0%	0%	4%	4%	3%	3%	3%	4%
Google Transit	28%	26%	54%	13%	28%	18%	30%	19%	31%	25%
www.511sd.com	12%	7%	14%	7%	12%	4%	14%	7%	16%	8%
Phone Source										
Mobile phone texting/GO! MTS app	9%	37%	1%	11%	10%	29%	14%	24%	13%	29%
Telephone information (619)233-3004	26%	20%	13%	9%	27%	23%	30%	33%	31%	29%
Info Express (619)685-4900	13%	10%	2%	1%	12%	9%	17%	20%	16%	18%
511	24%	13%	9%	16%	24%	10%	32%	17%	33%	16%
TTY/TDD info line (619)234-5995	6%	2%	0%	0%	5%	3%	5%	2%	6%	3%

In 2013, there was consensus overall between riders of varying modes of transportation about how helpful the majority of transit information tools were.

Attitudes toward the helpfulness of phone and online sources saw considerable improvements in 2013 from 2011 across riders of all modes of transportation except Premium buses. In particular, riders on the Local/Express buses and the Blue Line trolley indicated that four out of five phone sources were significantly more helpful than they had in 2011 while Orange Line trolley riders rated six out of seven online tools more favorably.

Also worth noting, attitudes toward *bus stop information signs* of Premium bus riders saw considerable improvement in 2013 from 2011.

Chart 34
Helpfulness of Transit Information Tools
By Specific Transportation Mode

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source										
Rider Alert onboard flyers	78%	79%	59%	88%	77%	75%	71%	91%	77%	78%
MTS Moves Me onboard newsletter	78%	81%	98%	84%	80%	79%	74%	93%	78%	86%
The Transit Store (First & Broadway)	84%	90%	69%	93%	86%	77%	81%	80%	85%	81%
Trolley station signs	91%	92%	72%	75%	90%	85%	90%	89%	92%	92%
Bus and trolley printed schedules	90%	93%	72%	94%	88%	87%	87%	92%	90%	94%
Bus stop information signs	87%	92%	48%	95%	86%	84%	86%	92%	90%	94%
Regional transit map	91%	94%	100%	84%	91%	89%	91%	95%	91%	89%

Chart 34 (Continued)
Helpfulness of Transit Information Tools
By Specific Transportation Mode

Q11. <u>Helpfulness of Information Tools</u> - Please let me how helpful they are. (%=Helpful)										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Online Source										
www.sdmts.com	81%	91%	42%	84%	77%	76%	77%	94%	79%	83%
MTS Trip Planner at www.sdmts.com	83%	92%	33%	96%	80%	81%	77%	93%	81%	87%
MTS Twitter	51%	77%	100%	3%	60%	40%	46%	87%	51%	0%
MTS Facebook	54%	62%	0%	100%	58%	49%	55%	100%	49%	100%
MTS Trolley Renewal email	56%	56%	0%	100%	62%	64%	54%	100%	48%	100%
Google Transit	88%	87%	100%	82%	88%	78%	85%	96%	85%	84%
www.511sd.com	77%	90%	19%	57%	77%	92%	75%	91%	76%	88%
Phone Source										
Mobile phone texting/GO! MTS app	75%	94%	100%	54%	76%	87%	75%	82%	76%	89%
Telephone Information (619)233-3004	83%	91%	43%	74%	83%	89%	79%	87%	86%	87%
Info Express (619)685-4900	75%	95%	0%	100%	75%	87%	72%	84%	76%	90%
511	73%	82%	72%	44%	74%	94%	73%	81%	75%	89%
TTY/TDD info line (619)234- 5995	73%	100%	100%	0%	71%	100%	67%	77%	67%	67%

Riders interviewed on the different modes of transportation rated customer service attributes consistently in 2013.

There was also little variation in ratings between 2011 and 2013 across each mode of transportation. An exception to this was that riders of the Local/Express buses demonstrated stronger satisfaction with *ease to get route or schedule information* in 2013 than they had in 2011.

Chart 35
Satisfaction with Customer Service
By Specific Transportation Mode

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Ease to get route or schedule information	95%	98%	100%	95%	94%	97%	94%	97%	94%	96%
Knowledge of customer service representatives	91%	92%	96%	86%	90%	94%	88%	93%	88%	90%
Ease of getting answers to issues or concerns	89%	92%	96%	79%	88%	92%	86%	90%	86%	90%

Satisfaction with the improvements made from 2011 to 2013 was relatively high, with the majority of riders on all modes of transportation indicating they were very satisfied or satisfied with all of the improvements.

Chart 36
MTS Improvements – Implemented
By Specific Transportation Mode

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below.*										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Use mobile phone to get real time arrival for next bus or trolley	62%	99%	40%	76%	63%	97%	60%	100%	67%	95%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	81%	93%	72%	100%	84%	96%	82%	94%	85%	94%
Installation of security cameras on all bus and trolley vehicles	84%	98%	81%	100%	85%	98%	83%	93%	85%	95%
Increased number of low-floor trolleys	75%	97%	53%	100%	78%	94%	74%	96%	76%	96%
Increased number of low-floor buses	78%	98%	37%	100%	78%	99%	75%	96%	78%	95%
Transition for all monthly and day passes to Compass Card	85%	95%	93%	100%	86%	95%	87%	92%	89%	91%
New Green Line routing into downtown	N/A	93%	N/A	100%	N/A	97%	N/A	93%	N/A	94%
New Orange Line routing to Santa Fe Depot	N/A	95%	N/A	100%	N/A	94%	N/A	93%	N/A	93%
New Blue Line routing to America Plaza	N/A	92%	N/A	99%	N/A	92%	N/A	93%	N/A	90%

* 2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)
2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

In 2013, most of the variation between the importance of improvements to be implemented in the future was found between the three lines of trolleys. Specifically, the Green Line trolley riders placed significantly more importance than Orange Line Riders on five out of six of the planned improvements. Both Blue Line and Green Line riders rated *real time trolley arrival signs at all trolley stations*, *Trolley Renewal Project to rebuild/improve the Blue Line* and *future Mid-City Bus Rapid Transit routes* as significantly more important than Orange Line riders.

Local/Express bus riders, Blue Line riders, and Green Line riders rated the majority of improvements proposed significantly more important in 2013 than they had in 2011. In particular, riders on the Local/Express buses rated all proposed improvements more important in 2013.

Chart 37
MTS Improvements – To Be Implemented In the Future
By Specific Transportation Mode

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)										
Specific Transportation Mode	Bus				Trolley					
	Local/Express		Premium		Blue		Orange		Green	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	83%	91%	65%	91%	84%	95%	85%	86%	88%	96%
Trolley Renewal Project to rebuild/improve the Blue Line	81%	87%	72%	92%	84%	92%	82%	83%	85%	94%
Future I-15 bus rapid transit routes	70%	81%	95%	100%	71%	78%	74%	72%	74%	86%
Future Mid-City Bus Rapid Transit routes	70%	83%	73%	92%	71%	89%	78%	77%	78%	91%
Future Mid-Coast Trolley extension to University City/UCSD	72%	84%	76%	94%	74%	85%	75%	79%	76%	93%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	92%	N/A	93%	N/A	90%	N/A	85%	N/A	95%
Ability to purchase a Day Pass using your mobile smart phone	N/A	78%	N/A	83%	N/A	79%	N/A	67%	N/A	80%

The top three most important reasons for taking public transit were considerably less consistent between rider types in 2013 than they had been in 2011. As in 2011, *save money* and *price of fuel* were cited as top three reasons by the majority of riders. However, the majority of riders in 2013 were more likely to indicate *no car to use* and less likely to indicate *better for environment* than they had in 2011. An exception to this was found in Premium bus riders who were more likely to cite *better for environment* as a top three reason than they had been in 2011.

Figure 14
Reasons for Taking Public Transit
By Specific Transportation Mode
(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit									
Bus				Trolley					
Local/Express		Premium		Blue		Orange		Green	
2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**
Save Money (95%)	Save Money (73%)	Save Money (95%)	Save Money (90%)	Save Money (94%)	No Car to Use (69%)	Save Money (94%)	No Car to Use (72%)	Save Money (95%)	Save Money (76%)
Better for Environment (92%)	No Car to Use (69%)	Price of Fuel (95%)	Better for Environment (52%)	Better for Environment (91%)	Save Money (69%)	Better for Environment (88%)	Save Money (63%)	Better for Environment (89%)	No Car to Use (66%)
Price of Fuel (86%)	Price of Fuel (39%)	Avoid Traffic (94%)	Avoid Traffic (47%)	Price of Fuel (84%)	No Driver's License (35%)	Price of Fuel (84%)	Price of Fuel (40%)	Price of Fuel (84%)	Price of Fuel (40%)


*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

Section 7: Detailed Findings – Demographic Subgroups

In this section, subgroup differences between the following demographics are reviewed and analyzed:

- Gender
- Income
- Age
- Ethnicity
- Rider Frequency

Bold numbers indicate significantly higher results between sub-groups. A  indicates a significantly higher result when comparing years.

By Gender

As in 2011, responses to questions concerning overall satisfaction with MTS were consistent between Males and Females in 2013.

Chart 38
Overall Satisfaction with MTS
By Gender

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)				
Gender	Male		Female	
	2011	2013	2011	2013
MTS overall transit service	93%	98%	92%	97%
Transit service in my area meets my needs	91%	94%	90%	94%

On par with 2011, responses to questions concerning MTS overall service were generally consistent between the genders in 2013. An exception to this was that Males were more likely than Females to strongly agree or agree with the statement, *I am comfortable with other riders*.

Chart 39
Feedback on MTS Overall
By Gender

Q10. <u>Feedback on MTS Overall</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Gender	Male		Female	
	2011	2013	2011	2013
MTS routes go where I need to go	96%	97%	95%	94%
MTS Routes offer good frequency of service	84%	89%	85%	91%
Transit centers are clean	85%	90%	84%	91%
The cost of a pass or ticket is fair	80%	86%	78%	83%
The Compass Card is easy to use and reload	95%	97%	91%	97%
I am comfortable with other riders	88%	93%	82%	83%
There is enough room on MTS vehicles for riders in wheelchairs	79%	79%	76%	78%

As was the case in 2011, opinions of MTS bus service did not vary between Males and Females in 2013.

Chart 40
Feedback on MTS Buses
By Gender

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Gender	Male		Female	
	2011	2013	2011	2013
MTS bus stops are clean	85%	87%	82%	84%
MTS buses I ride are clean	93%	91%	87%	88%
MTS buses are comfortable	85%	93%	87%	91%
MTS buses are easy to board	96%	97%	96%	95%
MTS bus operators are courteous	85%	87%	85%	83%
MTS buses I ride are always on time	66%	65%	64%	69%
The hours of service of MTS bus routes are adequate	70%	79%	73%	81%

Responses to questions concerning MTS trolley service were highly consistent between genders in both 2011 and 2013. In 2013 however, Females were more likely than Males to strongly agree or agree with *MTS trolley lines hours of service are adequate*.

Chart 41
Feedback on MTS Trolleys
By Gender

Q10. Feedback on MTS Trolleys - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Gender	Male		Female	
	2011	2013	2011	2013
MTS trolley stations are clean	86%	90%	87%	92%
MTS trolleys I ride are clean	83%	91%	84%	89%
MTS trolleys are comfortable	90%	94%	91%	95%
MTS trolleys are easy to board	90%	96%	92%	93%
Bikes on the transit do not interfere with other riders	68%	76%	64%	75%
Onboard trolley security and fare inspectors are courteous	75%	79%	81%	81%
MTS trolleys I ride are always on time	81%	80%	82%	83%
MTS trolley lines hours of service are adequate	N/A	86%	N/A	91%

Transit information tool usage in 2013 was nearly identical in Males and Females, as it was in 2011. Aside from this general consistency, in 2013, Males were more likely to use *regional transit maps* while Females were more likely to use *Rider Alert onboard flyers*.

Chart 42
Use of Transit Information Tools
By Gender

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.				
Gender	Male		Female	
	2011	2013	2011	2013
Physical Source				
Rider Alert onboard flyers	31%	23%	33%	30%
MTS Moves Me onboard newsletter	21%	18%	23%	22%
The Transit Store (First & Broadway)	23%	30%	24%	27%
Trolley station signs	57%	62%	58%	60%
Bus and trolley printed schedules	74%	66%	79%	62%
Bus stop information signs	75%	59%	72%	58%
Regional transit map	45%	41%	44%	32%
Online Source				
www.sdmts.com	28%	37%	33%	41%
MTS Trip Planner at www.sdmts.com	27%	34%	30%	29%
MTS Twitter	3%	3%	2%	2%
MTS Facebook	3%	3%	4%	4%
MTS Trolley Renewal email	4%	3%	2%	4%
Google Transit	28%	23%	31%	23%
www.511sd.com	12%	7%	11%	6%
Phone Source				
Mobile phone texting/GO! MTS app	10%	31%	8%	33%
Telephone information (619)233-3004	23%	23%	26%	20%
Info Express (619)685-4900	12%	12%	10%	9%
511	23%	14%	21%	13%
TTY/TDD info line (619)234-5995	5%	3%	5%	2%

In 2013, Males and Females found all of the transit information tools equally helpful. Similar results had been shown in 2011 with the exception of ratings given to *The Transit Store*.

Chart 43
Helpfulness of Transit Information Tools
By Gender

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)				
Gender	Male		Female	
	2011	2013	2011	2013
Physical Source				
Rider Alert onboard flyers	75%	75%	81%	85%
MTS Moves Me onboard newsletter	77%	79%	83%	86%
The Transit Store (First & Broadway)	77%	87%	92%	86%
Trolley station signs	88%	90%	92%	90%
Bus and trolley printed schedules	87%	91%	92%	93%
Bus stop information signs	84%	88%	88%	93%
Regional transit map	92%	94%	90%	90%
Online Source				
www.sdmts.com	78%	88%	80%	87%
MTS Trip Planner at www.sdmts.com	80%	90%	83%	90%
MTS Twitter	46%	70%	65%	63%
MTS Facebook	42%	60%	65%	67%
MTS Trolley Renewal email	44%	81%	69%	53%
Google Transit	89%	86%	89%	85%
www.511sd.com	75%	86%	76%	87%
Phone Source				
Mobile phone texting/GO! MTS app	73%	89%	78%	93%
Telephone information (619)233-3004	79%	91%	87%	88%
Info Express (619)685-4900	71%	95%	78%	86%
511	75%	83%	73%	80%
TTY/TDD info line (619)234-5995	80%	94%	63%	95%

Customer service attributes were rated the same by both genders in 2013, as they had been in 2011.

Chart 44
Satisfaction with Customer Service
By Gender

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)				
Gender	Male		Female	
	2011	2013	2011	2013
Ease to get route or schedule information	94%	98%	95%	97%
Knowledge of customer service representatives	91%	92%	92%	92%
Ease of getting answers to issues or concerns	89%	91%	88%	91%

Satisfaction with the improvements MTS implemented in 2013 was high for both gender subgroups, with over 90% of both Males and Females indicating they were very satisfied or satisfied. There were no differences in how Males and Females responded to the improvements.

Chart 45
MTS Improvements – Implemented
By Gender

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below.*				
Gender	Male		Female	
	2011	2013	2011	2013
Use mobile phone to get real time arrival for next bus or trolley	62%	97%	63%	98%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	80%	93%	83%	95%
Installation of security cameras on all bus and trolley vehicles	83%	97%	84%	98%
Increased number of low-floor trolleys	74%	96%	76%	97%
Increased number of low-floor buses	76%	97%	78%	98%
Transition for all monthly and day passes to Compass Card	85%	95%	86%	94%
New Green Line routing into downtown	N/A	95%	N/A	93%
New Orange Line routing to Santa Fe Depot	N/A	95%	N/A	94%
New Blue Line routing to America Plaza	N/A	93%	N/A	91%

*2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)

2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

Whereas in 2011 there were no differences between the genders, Females tended to rate future improvements planned by MTS to be more important than Males in 2013. Specifically, Females found the following planned improvements to be more important:

- *Future I-15 bus rapid transit routes*
- *Future Mid-City Bus Rapid Transit routes*
- *Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses*

Chart 46
MTS Improvements – To Be Implemented In the Future
By Gender

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)				
Gender	Male		Female	
	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	82%	92%	85%	92%
Trolley Renewal Project to rebuild/improve the Blue Line	80%	86%	83%	91%
Future I-15 bus rapid transit routes	72%	78%	70%	85%
Future Mid-City Bus Rapid Transit routes	70%	82%	71%	88%
Future Mid-Coast Trolley extension to University City/UCSD	71%	83%	73%	88%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	89%	N/A	95%
Ability to purchase a Day Pass using your mobile smart phone	N/A	75%	N/A	81%

As was the case in 2011, *save money* was the most important reason for taking public transit for both genders in 2013. Males and Females in 2013 also agreed that *no car to use* was a top three reason. However, Females in 2013 were more likely to cite *no driver's license* as one of their top three most important reasons while Males were more likely to cite *price of fuel*.

Compared to 2011, both Males and Females in 2013 were less likely cite *better for environment* as a top three most important reason for taking public transit and more likely to cite *no car to use*. Meanwhile, Females were more likely to indicate *no driver's license* and less likely to indicate *avoid traffic* as having great relative importance in 2013 than they were in 2011.

Figure 15
Reasons for Taking Public Transit
By Gender

(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit			
Male		Female	
2011*	2013**	2011*	2013**
Save Money (93%)	Save Money (74%)	Save Money (95%)	Save Money (71%)
Better for Environment (89%)	No Car to Use (62%)	Better for Environment (93%)	No Car to Use (70%)
Price of Fuel (86%)	Price of Fuel (42%)	Avoid Traffic (86%)	No Driver's License (35%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

By Income

Unlike in 2011 where overall satisfaction attributes were rated more favorably by riders making \$25K+ annually, riders' income had no bearing on their ratings in 2013.

Chart 47
Overall Satisfaction with MTS
By Income

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS overall transit service	90%	97%	93%	99%	98%	98%	94%	99%
Transit service in my area meets my needs	86%	93%	92%	90%	95%	94%	96%	95%

Rider income had a greater effect on ratings of MTS overall service in 2013 than it had in 2011. In particular:

- Riders making \$25K+ a year were more likely to strongly agree or agree with *the cost of a pass or ticket is fair*.
- Riders making \$50K+ a year were less likely to agree with *MTS routes go where I need to go*.

Chart 48
Feedback on MTS Overall
By Income

Q10. <u>Feedback on MTS Overall</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS routes go where I need to go	94%	95%	96%	98%	97%	98%	98%	85%
MTS routes offer good frequency of service	80%	90%	87%	89%	89%	85%	86%	96%
Transit centers are clean	81%	86%	86%	91%	84%	91%	93%	98%
The cost of a pass or ticket is fair	78%	78%	80%	78%	85%	90%	86%	97%
The Compass Card is easy to use and reload	91%	98%	93%	95%	97%	96%	97%	94%
I am comfortable with other riders	82%	87%	86%	88%	84%	86%	93%	85%
There is enough room on MTS vehicles for riders in wheelchairs	74%	68%	81%	77%	80%	86%	78%	81%

Where in 2011 riders making \$25K-\$49K were slightly more satisfied with MTS bus service, 2013 responses indicated that riders making \$50K+ were typically more satisfied. In particular, riders making \$50K+:

- Were more likely strongly agree or agree with *MTS bus operators are courteous*
- Were more likely to report they strongly agreed or agreed with *MTS buses are comfortable* than those making less than \$25K

Chart 49
Feedback on MTS Buses
By Income

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS bus stops are clean	81%	79%	80%	84%	89%	87%	83%	93%
MTS buses I ride are clean	87%	89%	93%	83%	95%	88%	95%	97%
MTS buses are comfortable	83%	89%	89%	88%	88%	92%	92%	97%
MTS buses are easy to board	95%	95%	99%	92%	96%	94%	97%	99%
MTS bus operators are courteous	82%	83%	87%	81%	86%	77%	92%	99%
MTS buses I ride are always on time	59%	65%	69%	61%	73%	61%	75%	80%
The hours of service of MTS bus routes are adequate	67%	77%	71%	80%	78%	76%	82%	88%

In 2013, those making \$15K-\$24K were generally more satisfied with the trolley service than other income subgroups.

Also noteworthy, riders making less than \$15K were less likely to agree with the statement *MTS trolleys are easy to board* than all other riders.

Chart 50
Feedback on MTS Trolleys
By Income

Q10. Feedback on MTS Trolleys - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
MTS trolley stations are clean	85%	87%	91%	90%	87%	92%	91%	94%
MTS trolleys I ride are clean	80%	89%	84%	90%	88%	93%	88%	92%
MTS trolleys are comfortable	90%	90%	92%	98%	92%	96%	97%	92%
MTS trolleys are easy to board	90%	90%	91%	98%	88%	98%	97%	99%
Bikes on the transit do not interfere with other riders	76%	75%	55%	89%	70%	64%	77%	72%
Onboard trolley security and fare inspectors are courteous	73%	74%	79%	81%	75%	80%	87%	84%
MTS trolleys I ride are always on time	79%	76%	86%	89%	86%	82%	89%	77%
MTS trolley lines hours of service are adequate	N/A	84%	N/A	94%	N/A	91%	N/A	83%

In 2013, the types of transit information tools riders chose to use were more dependent on their annual income than it had been in 2011. Evidence of this was found in the following:

- Riders in 2013 making \$50K+ were significantly less likely to turn to *bus and trolley printed schedules* and *trolley station signs* than riders making <\$50K, and more likely to use the *www.sdmts.com website* instead.
- Riders making \$15K-\$24K were more likely to use *trolley station signs* than all other income subgroups.
- Riders making annual incomes of \$15K-\$49K gravitated significantly more toward *mobile phone texting/GO! MTS app*, *MTS Trip Planner*, and *telephone information* than those making <\$15K.
- Riders making <\$15K were significantly more likely to use the *regional transit map* than those making \$25K+.
- Riders making \$25K-\$49K were significantly more likely to use *MTS Moves Me onboard newsletter* than those making <\$25K.

Chart 51
Use of Transit Information Tools
By Income

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source								
Rider Alert onboard flyers	29%	24%	41%	28%	23%	34%	49%	34%
MTS Moves Me onboard newsletter	22%	17%	28%	19%	18%	31%	28%	30%
The Transit Store (First & Broadway)	28%	31%	26%	30%	22%	35%	21%	33%
Trolley station signs	57%	64%	65%	77%	58%	61%	50%	37%
Bus and trolley printed schedules	75%	68%	83%	71%	73%	68%	74%	45%
Bus stop information signs	71%	61%	80%	63%	75%	64%	66%	47%
Regional transit map	45%	46%	51%	36%	42%	35%	49%	27%

Chart 51 (Continued)
Use of Transit Information Tools
By Income

Q11. <u>Use of transit information tools</u> - Please let me know if you use each of the following transit information tools.								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
Online Source								
www.sdmts.com	31%	27%	34%	35%	29%	38%	33%	71%
MTS Trip Planner at www.sdmts.com	29%	22%	32%	38%	33%	37%	29%	36%
MTS Twitter	2%	3%	1%	6%	1%	2%	6%	3%
MTS Facebook	4%	5%	6%	6%	3%	4%	2%	1%
MTS Trolley Renewal email	4%	6%	2%	1%	2%	4%	2%	1%
Google Transit	22%	21%	30%	31%	34%	22%	44%	17%
www.511sd.com	14%	6%	8%	8%	12%	9%	16%	9%
Phone Source								
Mobile phone texting/GO! MTS app	11%	22%	12%	40%	3%	33%	9%	19%
Telephone information (619)233-3004	30%	24%	31%	27%	30%	27%	25%	12%
Info Express (619)685-4900	14%	13%	14%	14%	12%	14%	8%	5%
511	24%	11%	32%	15%	19%	22%	20%	11%
TTY/TDD info line (619)234-5995	4%	4%	5%	5%	7%	3%	3%	1%

As in 2011, ratings of helpfulness varied slightly across income subgroups in 2013. In particular riders making <\$15K rated a number of tools as less helpful than other income subgroups. Transit information tools rated as significantly less helpful by riders making <\$15K included:

- *511 and MTS Trolley Renewal emails*: Rated as less helpful than riders making \$15K+
- *Google Transit*: Rated as less helpful than riders making \$15K-\$24K and riders making \$50K+

Also worth noting, *Google Transit* was rated as significantly less helpful by riders making \$25-\$49K annually than riders making \$15K-\$24K and \$50K+.

Chart 52
Helpfulness of Transit Information Tools
By Income

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source								
Rider Alert onboard flyers	78%	78%	83%	74%	75%	77%	75%	93%
MTS Moves Me onboard newsletter	74%	82%	86%	72%	69%	81%	69%	88%
The Transit Store (First & Broadway)	84%	89%	84%	75%	83%	80%	83%	94%
Trolley station signs	92%	90%	95%	88%	91%	93%	91%	88%
Bus and trolley printed schedules	92%	90%	89%	92%	91%	90%	91%	95%
Bus stop information signs	89%	93%	87%	88%	89%	90%	89%	96%
Regional transit map	90%	89%	100%	93%	92%	93%	92%	98%

Chart 52 (Continued)
Helpfulness of Transit Information Tools
By Income

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
Online Source								
www.sdmts.com	71%	88%	83%	88%	84%	86%	84%	89%
MTS Trip Planner at www.sdmts.com	75%	87%	88%	89%	87%	88%	87%	95%
MTS Twitter	49%	42%	47%	92%	50%	42%	50%	46%
MTS Facebook	56%	50%	45%	77%	64%	60%	64%	100%
MTS Trolley Renewal email	47%	49%	70%	90%	58%	82%	58%	100%
Google Translt	74%	76%	93%	93%	96%	76%	97%	100%
www.511sd.com	67%	75%	90%	92%	92%	100%	92%	81%
Phone Source								
Mobile phone texting/GOI MTS app	58%	91%	90%	87%	68%	90%	68%	91%
Telephone information (619)233-3004	85%	89%	84%	91%	89%	87%	89%	100%
Info Express (619)685-4900	73%	90%	90%	90%	87%	98%	87%	100%
511	67%	76%	89%	91%	76%	82%	76%	74%
TTY/TDD info line (619)234-5995	34%	96%	100%	86%	86%	99%	86%	100%

As in 2011, responses to customer service showed little variation between the income subgroups. An exception to this:

- *Knowledge of customer service representatives* was rated significantly lower by those making \$25K-\$49K annually than both those making <\$15K and those making \$50K+ in 2013.

Chart 53
Satisfaction with Customer Service
By Income

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
Ease to get route or schedule information	92%	97%	93%	97%	99%	95%	94%	97%
Knowledge of customer service representatives	90%	95%	91%	90%	90%	82%	92%	92%
Ease of getting answers to issues or concerns	88%	91%	89%	92%	93%	86%	88%	86%

Satisfaction with the improvements made by MTS in 2013 was similar among all subgroups of riders making \$15K+ annually. Riders making <\$15K were less satisfied than at least one other income subgroup with all improvements except new Blue Line routing to American Plaza and use mobile phone to get real time arrival for next bus or trolley.

Chart 54
MTS Improvements – Implemented
By Income

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below.*								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
Use mobile phone to get real time arrival for next bus or trolley	61%	97%	57%	98%	72%	99%	65%	91%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	80%	93%	86%	96%	82%	91%	83%	99%
Installation of security cameras on all bus and trolley vehicles	86%	96%	86%	97%	88%	99%	85%	97%
Increased number of low-floor trolleys	74%	94%	81%	99%	85%	98%	72%	95%
Increased number of low-floor buses	77%	94%	84%	100%	87%	98%	67%	100%
Transition for all monthly and day passes to Compass Card	81%	93%	89%	93%	88%	95%	95%	99%
New Green Line routing into downtown	N/A	90%	N/A	96%	N/A	96%	N/A	96%
New Orange Line routing to Santa Fe Depot	N/A	91%	N/A	93%	N/A	98%	N/A	97%
New Blue Line routing to America Plaza	N/A	89%	N/A	95%	N/A	93%	N/A	95%

* 2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)

2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

As in 2011, there was some variation in how important planned future improvements were to the different income subgroups. In particular:

- Creating *future I-15 bus rapid transit routes* was significantly less important to riders making \$15K-\$49K than all other riders.
- Those making \$25K-\$49K rated creating *future Mid-Coast Trolley extension to University City/UCSD* as significantly less important than both riders making <\$15K and \$50K+ annually.

Chart 55
MTS Improvements – To Be Implemented In The Future
By Income

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)								
Income	<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
	2011	2013	2011	2013	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	83%	93%	84%	92%	85%	87%	85%	93%
Trolley Renewal Project to rebuild/improve the Blue Line	80%	91%	86%	87%	82%	86%	83%	94%
Future I-15 bus rapid transit routes	72%	88%	68%	78%	76%	72%	86%	96%
Future Mid-City Bus Rapid Transit routes	69%	86%	73%	82%	77%	84%	86%	93%
Future Mid-Coast Trolley extension to University City/UCSD	73%	89%	72%	84%	72%	79%	83%	95%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	91%	N/A	91%	N/A	90%	N/A	94%
Ability to purchase a Day Pass using your mobile smart phone	N/A	79%	N/A	78%	N/A	73%	N/A	85%

As was the case in 2011, the top three most important reasons for taking public transit varied across income subgroups in 2013. Though *save money* was consistently rated as a top three reason across all income subgroups, likelihood to cite other reasons was less consistent. *No car to use* was cited as a top three important reason by all groups making <\$50K a year while those making \$15K-\$49K were more likely to cite *price of fuel*. Those making <\$15K were more likely to place more importance on *no driver's license* while those making \$50K+ were more likely to cite *avoid traffic* as a top three reason for taking public transit.

Figure 16
Reasons for Taking Public Transit
By Income

(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit							
<\$15K		\$15K-\$24K		\$25K-\$49K		\$50K+	
2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**
Save Money (96%)	No Car to Use (73%)	Save Money (95%)	Save Money (67%)	Better for Environment (96%)	Save Money (70%)	Better for Environment (90%)	Save Money (85%)
Better for Environment (88%)	Save Money (69%)	Better for Environment (94%)	No Car to Use (64%)	Save Money (93%)	No Car to Use (67%)	Save Money (88%)	Price of Fuel (47%)
Price of Fuel (86%)	No Driver's License (41%)	Avoid Traffic (88%)	Price of Fuel (46%)	Price of Fuel (92%)	Price of Fuel (46%)	Avoid Traffic (91%)	Avoid Traffic (42%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

By Age

As in 2011, the only variation in ratings of overall satisfaction attributes was demonstrated by 13-18 year olds in 2013. Specifically, this age group rated *transit service in my area meets my needs* more favorably than 35-49 year olds.

Chart 56
Overall Satisfaction with MTS
By Age

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS overall transit service	97%	99%	93%	99%	93%	98%	93%	97%	87%	99%	95%	98%
Transit service in my area meets my needs	93%	98%	92%	95%	92%	94%	91%	90%	86%	96%	91%	92%

On par with 2011 findings, ratings of MTS overall service varied considerably across the tested age groups. Variations of interest included:

- Riders 35-49 years old were significantly less likely to strongly agree or agree with *MTS routes go where I need to go* than all other ages except those 60+ years old.
- Riders aged 60+ years old were more likely to agree with *the cost of a pass or ticket is fair* and less likely to agree with *MTS routes offer good frequency of service* than those under 35 years old.

Chart 57
Feedback on MTS Overall
By Age

Q10. Feedback on MTS Overall - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS routes go where I need to go	99%	98%	95%	98%	98%	97%	96%	89%	91%	98%	95%	93%
MTS routes offer good frequency of service	89%	95%	87%	94%	86%	93%	83%	88%	81%	87%	88%	82%
Transit centers are clean	79%	93%	84%	88%	87%	91%	87%	92%	79%	93%	89%	91%
The cost of a pass or ticket is fair	70%	82%	81%	81%	71%	79%	81%	85%	85%	92%	91%	92%
The Compass card is easy to use and reload	97%	99%	94%	96%	93%	99%	93%	97%	92%	96%	96%	98%
I am comfortable with other riders	78%	86%	87%	91%	85%	89%	86%	83%	85%	93%	93%	95%
There is enough room on MTS vehicles for riders in wheelchairs	72%	77%	86%	84%	73%	83%	82%	72%	80%	79%	73%	72%

As indicated in 2011, older riders tended to rate MTS bus service more favorably than younger riders. In particular:

- Riders 60+ years old were more likely to strongly agree or agree with *MTS buses I ride are clean* than all riders under 50 years old and were more likely to agree with *MTS bus operators are courteous* than riders 13-18 years old and 25-34 years old.
- Riders 50-59 years old were significantly more likely to agree with these statements than riders 25-34 years old.

Chart 58
Feedback on MTS Buses
By Age

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS bus stops are clean	80%	81%	88%	83%	81%	87%	84%	87%	80%	88%	90%	91%
MTS buses I ride are clean	89%	87%	96%	91%	87%	85%	89%	89%	93%	96%	93%	99%
MTS buses are comfortable	77%	88%	86%	91%	83%	89%	88%	95%	92%	95%	94%	92%
MTS buses are easy to board	92%	98%	96%	94%	96%	96%	98%	95%	96%	96%	94%	98%
MTS bus operators are courteous	78%	83%	88%	87%	81%	80%	83%	87%	87%	92%	92%	94%
MTS buses I ride are always on time	46%	69%	70%	65%	62%	62%	67%	71%	69%	71%	77%	68%
The hours of service of MTS bus routes are adequate	69%	83%	73%	81%	69%	81%	73%	79%	74%	81%	77%	82%

As in 2011, satisfaction with MTS trolley service varied across age groups in 2013. Riders 13-18 years old were generally the least likely to agree with the tested trolley service attributes. In particular, this age group was less likely to strongly agree or agree with *MTS trolleys are comfortable* than riders 25+ years old and less likely to strongly agree with *onboard trolley security and fare inspectors are courteous* than all other riders.

Also worth noting, 25-34 year olds were significantly more likely to agree with the statement *bikes on the trolleys do not interfere with other riders* than riders over 35+ years old.

Chart 59
Feedback on MTS Trolleys
By Age

Q10. Feedback on MTS Trolleys - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS trolley stations are clean	81%	86%	88%	86%	80%	92%	89%	93%	93%	92%	90%	95%
MTS trolleys I ride are clean	81%	88%	82%	82%	80%	92%	82%	93%	94%	93%	90%	96%
MTS trolleys are comfortable	89%	85%	93%	93%	84%	96%	91%	96%	92%	97%	94%	97%
MTS trolleys are easy to board	90%	92%	95%	96%	91%	96%	88%	97%	88%	94%	88%	91%
Bikes on the transit do not interfere with other riders	70%	77%	69%	80%	66%	84%	66%	75%	71%	65%	57%	68%
Onboard trolley security and fare inspectors are courteous	72%	66%	82%	83%	64%	83%	81%	83%	85%	81%	88%	82%
MTS trolleys I ride are always on time	82%	70%	81%	81%	77%	89%	88%	80%	78%	84%	91%	78%
MTS trolley lines hours of service are adequate	N/A	81%	N/A	89%	N/A	94%	N/A	85%	N/A	87%	N/A	95%

Transit information tool usage varied across age groups similarly in 2011 and 2013. In both years, older riders (50+ years old) were more likely to use physical sources. Specifically, in 2013, older riders were particularly more likely to use the following:

- *The Transit Store (First and Broadway)*
- *Rider Alert onboard flyers*

In 2011 and 2013, older riders were less likely to use online and mobile sources. Specifically, in 2013 older riders were especially less likely to use:

- *www.sdmts.com website*
- *Mobile phone texting/GO! MTS app*
- *MTS Trip Planner*
- *Google Transit*

Chart 60
Use of Transit Information Tools
By Age

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source												
Rider Alert onboard flyers	22%	17%	32%	19%	29%	20%	28%	31%	40%	29%	35%	41%
MTS Moves Me onboard newsletter	17%	10%	21%	15%	16%	12%	19%	27%	30%	21%	25%	35%
The Transit Store (First & Broadway)	11%	20%	19%	18%	25%	21%	26%	40%	31%	37%	26%	37%
Trolley station signs	52%	52%	60%	66%	58%	65%	55%	64%	63%	53%	48%	59%
Bus and trolley printed schedules	70%	58%	78%	62%	75%	62%	76%	70%	80%	69%	77%	60%
Bus stop information signs	71%	61%	78%	55%	72%	56%	69%	58%	79%	61%	71%	57%
Regional transit map	46%	38%	49%	35%	39%	31%	40%	41%	44%	39%	40%	36%

Chart 60 (Continued)
Use of Transit Information Tools
By Age

Q11. <u>Use of transit information tools</u> - Please let me know if you use each of the following transit information tools.												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Online Source												
www.sdmts.com	32%	36%	38%	47%	39%	46%	23%	39%	29%	29%	20%	27%
MTS Trip Planner at www.sdmts.com	28%	32%	28%	36%	33%	43%	24%	29%	27%	22%	24%	16%
MTS Twitter	2%	2%	1%	2%	3%	5%	3%	1%	4%	6%	0%	1%
MTS Facebook	3%	5%	6%	3%	2%	5%	5%	2%	4%	3%	0%	3%
MTS Trolley Renewal email	3%	7%	1%	3%	2%	1%	5%	4%	4%	3%	1%	4%
Google Transit	30%	25%	39%	31%	32%	26%	28%	23%	19%	12%	10%	13%
www.511sd.com	11%	7%	14%	5%	15%	6%	11%	5%	8%	9%	6%	8%
Phone Source												
Mobile phone texting/GO! MTS app	14%	40%	12%	45%	9%	40%	8%	29%	7%	15%	3%	6%
Telephone information (619)233-3004	17%	18%	21%	16%	23%	16%	33%	30%	23%	28%	18%	19%
Info Express (619)685-4900	10%	11%	6%	6%	9%	8%	18%	17%	15%	11%	7%	6%
511	17%	14%	21%	8%	18%	11%	25%	18%	31%	15%	18%	12%
TTY/TDD Info line (619)234-5995	2%	2%	3%	2%	6%	3%	10%	2%	4%	2%	0%	5%

As in 2011, 19-24 year olds generally found a wider variety of information tools helpful in 2013. Also similar to 2011, riders 60+ years old rated *telephone information* as more helpful and found the *www.sdmts.com website* to be significantly less helpful than most other age subgroups.

Chart 61
Helpfulness of Transit Information Tools
By Age

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source												
Rider Alert onboard flyers	65%	74%	86%	80%	61%	82%	81%	89%	74%	78%	83%	69%
MTS Moves Me onboard newsletter	78%	59%	83%	84%	71%	89%	74%	86%	82%	85%	74%	74%
The Transit Store (First & Broadway)	87%	88%	85%	89%	87%	83%	83%	86%	87%	95%	72%	75%
Trolley station signs	87%	93%	94%	92%	83%	91%	93%	90%	90%	92%	91%	89%
Bus and trolley printed schedules	84%	87%	91%	94%	87%	93%	91%	92%	91%	94%	84%	86%
Bus stop information signs	83%	88%	88%	92%	83%	91%	89%	92%	91%	95%	84%	87%
Regional transit map	85%	81%	96%	95%	85%	94%	92%	94%	91%	92%	97%	90%

Chart 61 (Continued)
Helpfulness of Transit Information Tools
By Age

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Online Source												
www.sdmts.com	86%	90%	90%	91%	70%	92%	74%	90%	68%	83%	78%	64%
MTS Trip Planner at www.sdmts.com	87%	97%	95%	95%	77%	91%	77%	90%	79%	82%	76%	72%
MTS Twitter	100%	23%	61%	77%	64%	77%	40%	80%	0%	62%	56%	0%
MTS Facebook	96%	41%	75%	92%	23%	78%	40%	37%	6%	75%	56%	33%
MTS Trolley Renewal email	100%	44%	53%	79%	49%	79%	43%	59%	0%	67%	63%	75%
Google Transit	81%	73%	96%	93%	88%	87%	91%	89%	72%	72%	77%	92%
www.511sd.com	62%	100%	91%	98%	71%	81%	77%	88%	35%	79%	100%	73%
Phone Source												
Mobile phone texting/GO! MTS app	82%	95%	86%	95%	82%	87%	69%	91%	43%	86%	47%	64%
Telephone Information (619)233-3004	70%	88%	89%	85%	83%	86%	86%	88%	92%	96%	62%	100%
Info Express (619)685-4900	65%	98%	88%	85%	83%	79%	75%	91%	74%	98%	61%	100%
511	69%	81%	85%	70%	82%	76%	74%	86%	59%	92%	84%	67%
TTY/TDD info line (619)234-5995	37%	100%	86%	100%	77%	100%	81%	62%	53%	100%	100%	100%

For the most part, ratings of customer service attributes did not vary across age subgroups noticeably in 2011 and 2013. An exception to this was found in the ratings given by 35-49 year olds to the following attributes:

- *Ease to get route or schedule information:* Rated lower by 35-49 year olds than by 13-18 year olds
- *Knowledge of customer service representatives:* Rated lower by 35-49 year olds than riders of all other tested age groups

Chart 62
Satisfaction with Customer Service
By Age

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Ease to get route or schedule information	92%	100%	99%	99%	96%	98%	95%	96%	89%	97%	93%	97%
Knowledge of customer service representatives	93%	96%	97%	95%	92%	93%	89%	84%	85%	93%	93%	97%
Ease of getting answers to issues or concerns	90%	96%	91%	94%	90%	93%	89%	88%	81%	90%	91%	88%

In 2013, there was only a slight difference in rider satisfaction with the improvements implemented by MTS across age groups:

- Riders aged 13-18 years old were significantly less satisfied with the *increased number of low-floor buses and trolleys* than riders 19-49 years old.

Chart 63
MTS Improvements – Implemented
By Age

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below.*												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Use mobile phone to get real time arrival for next bus or trolley	66%	99%	68%	98%	67%	100%	63%	97%	54%	98%	56%	88%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	75%	93%	81%	96%	87%	97%	83%	92%	82%	95%	88%	89%
Installation of security cameras on all bus and trolley vehicles	64%	98%	84%	98%	87%	98%	88%	98%	90%	97%	94%	93%
Increased number of low-floor trolleys	63%	90%	68%	98%	80%	99%	80%	98%	81%	96%	85%	95%
Increased number of low-floor buses	68%	92%	67%	99%	80%	99%	81%	98%	84%	98%	86%	97%
Transition for all monthly and day passes to Compass Card	85%	93%	81%	94%	87%	92%	88%	96%	82%	95%	94%	96%
New Green Line routing into downtown	N/A	92%	N/A	91%	N/A	97%	N/A	95%	N/A	96%	N/A	95%
New Orange Line routing to Santa Fe Depot	N/A	95%	N/A	91%	N/A	97%	N/A	94%	N/A	96%	N/A	95%
New Blue Line routing to America Plaza	N/A	90%	N/A	89%	N/A	92%	N/A	93%	N/A	94%	N/A	94%

* 2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)

2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

In 2013, similar to 2011, there were some differences in the importance placed on several of the planned improvements. Notably:

- Riders 13-34 years old rated *ability to purchase a Day Pass using your mobile smart phone* as significantly more important than riders 50+ years old.
- Riders 19-34 years old rated *real time trolley arrival signs at all trolley stations* as significantly more important than riders 60+ years old.
- Riders 19-59 years old rated the importance of *ordering up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses* significantly higher than riders 13-18 years old.

Chart 64
MTS Improvements – To Be Implemented In the Future
By Age

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)												
Age	13-18		19-24		25-34		35-49		50-59		60+	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	80%	93%	86%	96%	82%	96%	82%	91%	87%	92%	88%	82%
Trolley Renewal Project to rebuild/improve the Blue Line	75%	92%	81%	91%	87%	90%	83%	87%	82%	89%	88%	80%
Future I-15 bus rapid transit routes	56%	86%	76%	84%	73%	81%	75%	83%	73%	85%	72%	73%
Future Mid-City Bus Rapid Transit routes	57%	81%	74%	86%	73%	86%	72%	86%	76%	90%	72%	82%
Future Mid-Coast Trolley extension to University City/UCSD	69%	86%	75%	88%	73%	84%	75%	86%	69%	91%	72%	78%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	87%	N/A	95%	N/A	93%	N/A	91%	N/A	95%	N/A	86%
Ability to purchase a Day Pass using your mobile smart phone	N/A	85%	N/A	83%	N/A	84%	N/A	75%	N/A	61%	N/A	73%

In 2013, riders 19-59 years old generally rated *save money* as their top reason for riding public transit, *no car to use* as their second most important reason, and *price of fuel* as their third most important reason. Meanwhile, riders 13-18 years old and 60+ years old both cited *no car to use* as their top reason, *save money* as their second most important reason and *no driver's license* as their third most important reason.

Compared to 2011, riders in 2013 showed the following differences in reasons for riding public transit:

- Across all age groups, riders were less likely to give *better for the environment* as a reason for riding public transit in 2013.
- Riders aged 13-18 and 60+ years old were more likely to indicate *no driver's license* and less likely to cite *price of fuel* as one of their top three most important reasons in 2013.
- Riders 50-59 years old were more likely to cite *price of fuel* rather than *avoid traffic* as a top three reason for riding public transit in 2013.

Figure 17
Reasons for Taking Public Transit
By Age

(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit											
13-18		19-24		25-34		35-49		50-59		60+	
2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**
Better for Environment (88%)	No Car to Use (81%)	Save Money (97%)	Save Money (71%)	Save Money (90%)	Save Money (77%)	Save Money (99%)	Save Money (79%)	Save Money (94%)	Save Money (68%)	Better for Environment (92%)	No Car to Use (66%)
Save Money (87%)	Save Money (68%)	Better for Environment (91%)	No Car to Use (68%)	Better for Environment (86%)	No Car to Use (65%)	Better for Environment (95%)	No Car to Use (58%)	Better for Environment (93%)	No Car to Use (59%)	Save Money (89%)	Save Money (64%)
Price of Fuel (81%)	No Driver's License (48%)	Price of Fuel (84%)	Price of Fuel (40%)	Price of Fuel (82%)	Price of Fuel (46%)	Price of Fuel (92%)	Price of Fuel (36%)	Avoid Traffic (89%)	Price of Fuel (46%)	Price of Fuel (86%)	No Driver's License (41%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

By Ethnicity

In 2011 and 2013 there was little difference in overall satisfaction between ethnic groups. One exception:

- Hispanics were significantly more likely than Caucasians to be very satisfied or satisfied with how well *transit service in my area meets my needs*.

Chart 65
Overall Satisfaction with MTS
By Ethnicity

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS overall transit service	94%	99%	98%	99%	92%	97%	88%	98%	94%	97%
Transit service in my area meets my needs	91%	96%	99%	95%	89%	91%	92%	95%	87%	95%

There was slightly less variation in attitudes toward MTS overall service across ethnic groups in 2013 than in 2011. Significant variations between ethnic groups that were demonstrated in 2013 included:

- Significantly lower agreement with the statement *MTS routes go where I need to go* from the Asian demographic than all other ethnic groups tested
- Significantly lower agreement with the statement *I am comfortable with other riders* from the Asian demographic than Hispanics, Caucasians and Other ethnicities
- Significantly stronger agreement by Caucasians with the statement *there is enough room on MTS vehicles for riders in wheelchairs* than Hispanics

Chart 66
Feedback on MTS Overall
By Ethnicity

Q10. Feedback on MTS Overall - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS routes go where I need to go	95%	97%	100%	80%	95%	96%	96%	97%	97%	97%
MTS routes offer good frequency of service	86%	92%	90%	95%	84%	87%	86%	89%	77%	87%
Transit centers are clean	86%	89%	84%	95%	89%	93%	76%	92%	77%	83%
The cost of a pass or ticket is fair	78%	84%	90%	81%	85%	89%	66%	82%	74%	73%
The Compass card is easy to use and reload	91%	99%	98%	97%	97%	96%	92%	94%	92%	97%
I am comfortable with other riders	85%	89%	84%	76%	90%	89%	79%	88%	86%	91%
There is enough room on MTS vehicles for riders in wheelchairs	81%	77%	69%	73%	83%	84%	71%	79%	67%	70%

Whereas Caucasians and Hispanics showed stronger satisfaction with MTS bus services in 2011, there were differences in 2013 where Hispanics, Asians, Caucasians, and African Americans all gave very similar responses to MTS bus service attributes. Two exceptions include responses to the following two statements:

- *MTS buses I ride are clean*: Rated significantly higher by Caucasians than Hispanics
- *MTS buses I ride are always on time*: Rated significantly higher by Hispanics than African Americans

Hispanics, Asians, Caucasians, and African Americans generally gave higher ratings to bus service attributes than Other ethnicities, particularly for the following:

- *MTS buses are comfortable*
- *MTS buses are easy to board*

Chart 67
Feedback on MTS Buses
By Ethnicity

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS bus stops are clean	87%	86%	84%	84%	86%	90%	76%	81%	76%	71%
MTS buses I ride are clean	90%	87%	97%	91%	94%	95%	87%	89%	84%	85%
MTS buses are comfortable	87%	92%	96%	94%	88%	95%	82%	94%	72%	77%
MTS buses are easy to board	96%	97%	99%	98%	95%	97%	95%	94%	94%	83%
MTS bus operators are courteous	84%	85%	95%	87%	85%	88%	82%	82%	79%	83%
MTS buses I ride are always on time	68%	71%	77%	73%	69%	64%	53%	59%	49%	65%
The hours of service of MTS bus routes are adequate	74%	83%	77%	88%	75%	77%	65%	78%	56%	71%

As in 2011, some ethnic subgroup differences existed in 2013 for perceptions of trolleys. Notably:

- Asians were more likely than all other ethnicities except Hispanics to strongly agree or agree with *MTS trolleys I ride are always on time* and more likely to strongly agree or agree with *bikes on the transit do not interfere with other riders* than Caucasians.
- Hispanics, Asians, Caucasians, and African Americans generally rated *onboard security and fare inspectors are courteous* more favorably than Other ethnicities.

Chart 68
Feedback on MTS Trolleys
By Ethnicity

Q10. Feedback on MTS Trolleys - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
MTS trolley stations are clean	87%	92%	95%	88%	89%	92%	84%	89%	73%	89%
MTS trolleys I ride are clean	81%	89%	94%	92%	88%	94%	86%	88%	65%	89%
MTS trolleys are comfortable	90%	93%	93%	94%	90%	96%	89%	97%	93%	89%
MTS trolleys are easy to board	89%	93%	98%	94%	93%	98%	89%	97%	93%	92%
Bikes on the transit do not interfere with other riders	67%	77%	71%	86%	65%	70%	68%	78%	62%	77%
Onboard trolley security and fare inspectors are courteous	74%	82%	91%	84%	84%	81%	76%	78%	67%	65%
MTS trolleys I ride are always on time	82%	84%	92%	93%	83%	79%	78%	76%	81%	77%
MTS trolley lines hours of service are adequate	N/A	90%	N/A	94%	N/A	86%	N/A	87%	N/A	79%

Physical sources such as *trolley station signs, bus and trolley printed schedules, and bus stop information signs* continued to be the most used transit information tools in 2013 as they had in 2011.

However, in 2013 more ethnic groups seem to be opening up to the use of online and phone sources. Whereas in 2011 African Americans stood out as using phone and online sources more than the rest, all ethnic groups except Hispanics were now using online and phone sources as much and sometimes more than African Americans.

In particular, Hispanics indicated they used the *www.sdmts.com website* significantly less than most the other ethnic subgroups.

Chart 69
Use of Transit Information Tools
By Ethnicity

Q11. <u>Use of transit information tools</u> - Please let me know if you use each of the following transit information tools.										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source										
Rider Alert onboard flyers	30%	19%	29%	41%	43%	31%	24%	27%	17%	24%
MTS Moves Me onboard newsletter	23%	16%	21%	33%	29%	22%	14%	22%	9%	19%
The Transit Store (First & Broadway)	22%	21%	11%	39%	23%	33%	36%	39%	24%	23%
Trolley station signs	60%	63%	38%	53%	59%	61%	62%	63%	49%	56%
Bus and trolley printed schedules	76%	65%	78%	45%	79%	65%	70%	68%	75%	67%
Bus stop information signs	76%	58%	56%	44%	78%	61%	68%	61%	78%	64%
Regional transit map	45%	34%	44%	27%	48%	43%	37%	35%	38%	44%

Chart 69 (Continued)
Use of Transit Information Tools
By Ethnicity

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Online Source										
www.sdmts.com	25%	32%	33%	52%	35%	44%	37%	34%	36%	49%
MTS Trip Planner at www.sdmts.com	24%	30%	20%	24%	30%	33%	37%	31%	31%	38%
MTS Twitter	2%	3%	0%	3%	3%	4%	4%	2%	2%	0%
MTS Facebook	5%	5%	4%	1%	2%	3%	5%	3%	5%	1%
MTS Trolley Renewal email	4%	5%	1%	2%	2%	2%	5%	3%	0%	3%
Google Transit	26%	21%	43%	27%	27%	23%	29%	22%	37%	32%
www.511sd.com	10%	5%	18%	1%	11%	7%	13%	11%	14%	7%
Phone Source										
Mobile phone texting/GO! MTS app	8%	32%	9%	34%	7%	30%	15%	32%	11%	34%
Telephone information (619)233-3004	21%	21%	22%	14%	19%	22%	43%	31%	24%	19%
Info Express (619)685-4900	11%	10%	6%	5%	9%	11%	21%	16%	11%	9%
511	19%	10%	17%	6%	23%	18%	28%	19%	27%	10%
TTY/TDD info line (619)234-5995	5%	3%	8%	1%	4%	2%	5%	4%	4%	3%

In 2013, the majority of transit information tools were rated helpful by over 80% of riders within each ethnic subgroup.

As in 2011, Hispanics generally found several tools less helpful. However, in 2013 Caucasians also found a number of the tools significantly less helpful. Tools found less helpful by these ethnic groups in 2013 include*:

- Caucasians: *MTS Trip Planner, www.sdmts.com website, mobile phone texting/GO! MTS app and Google Transit*
- Hispanics: *MTS Trip Planner, MTS Moves Me onboard newsletter, and Google Transit*

*Small base sizes (n<30) were excluded from comparisons

Chart 70
Helpfulness of Transit Information Tools
By Ethnicity

Q11. <u>Helpfulness of Information Tools</u> - Please let me how helpful they are. (%=Helpful)										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Physical Source										
Rider Alert onboard flyers	80%	77%	83%	93%	83%	81%	64%	77%	40%	80%
MTS Moves Me onboard newsletter	78%	71%	76%	88%	92%	84%	60%	90%	33%	97%
The Transit Store (First & Broadway)	80%	82%	100%	89%	91%	87%	82%	91%	76%	87%
Trolley station signs	92%	91%	100%	91%	89%	90%	87%	94%	80%	86%
Bus and trolley printed schedules	89%	92%	100%	89%	91%	91%	84%	95%	78%	87%
Bus stop information signs	87%	91%	92%	91%	90%	91%	85%	92%	76%	87%
Regional transit map	91%	90%	96%	96%	92%	94%	95%	94%	78%	90%

Chart 70 (Continued)
Helpfulness of Transit Information Tools
By Ethnicity

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Online Source										
www.sdmts.com	80%	86%	100%	97%	77%	84%	71%	95%	84%	83%
MTS Trip Planner at www.sdmts.com	81%	89%	99%	100%	84%	86%	84%	96%	76%	89%
MTS Twitter	53%	71%	100%	75%	67%	54%	43%	100%	0%	100%
MTS Facebook	56%	76%	100%	33%	48%	47%	44%	56%	33%	100%
MTS Trolley Renewal email	58%	58%	100%	43%	43%	48%	45%	100%	100%	100%
Google Transit	88%	81%	98%	97%	92%	82%	83%	94%	84%	91%
www.511sd.com	75%	94%	94%	100%	66%	85%	71%	84%	86%	68%
Phone Source										
Mobile phone texting/GO! MTS app	75%	92%	100%	98%	67%	88%	73%	96%	100%	78%
Telephone information (619)233-3004	74%	88%	100%	88%	92%	95%	88%	91%	79%	72%
Info Express (619)685-4900	75%	89%	100%	84%	70%	99%	77%	90%	76%	93%
511	73%	85%	88%	80%	76%	79%	73%	91%	74%	63%
TTY/TDD info line (619)234-5995	59%	96%	100%	100%	84%	99%	84%	82%	100%	100%

In contrast to 2011, there were some subgroup differences in the evaluation of MTS customer service across ethnic subgroups. In particular, Caucasians were the least likely to indicate they were very satisfied or satisfied with *ease of getting answers to issues or concerns*.

Chart 71
Satisfaction with Customer Service
By Ethnicity

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Ease to get route or schedule information	94%	97%	99%	99%	94%	97%	96%	95%	94%	100%
Knowledge of customer service representatives	90%	94%	98%	97%	93%	91%	86%	88%	93%	88%
Ease of getting answers to issues or concerns	87%	94%	98%	95%	91%	85%	88%	94%	90%	93%

In 2013, satisfaction with the implemented improvements to MTS service varied considerably across tested ethnic subgroups. Caucasians and African Americans were particularly less satisfied with the majority of the improvements made.

Chart 72
MTS Improvements – Implemented
By Ethnicity

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below.*										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Use mobile phone to get real time arrival for next bus or trolley	60%	98%	64%	98%	69%	97%	57%	99%	59%	95%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	84%	95%	78%	100%	81%	93%	78%	95%	81%	86%
Installation of security cameras on all bus and trolley vehicles	86%	98%	85%	96%	81%	97%	85%	98%	77%	97%
Increased number of low-floor trolleys	78%	96%	73%	99%	72%	96%	80%	97%	66%	97%
Increased number of low-floor buses	81%	98%	71%	98%	71%	98%	82%	97%	71%	94%
Transition for all monthly and day passes to Compass Card	86%	96%	86%	97%	90%	94%	83%	93%	80%	93%
New Green Line routing into downtown	N/A	96%	N/A	98%	N/A	92%	N/A	94%	N/A	89%
New Orange Line routing to Santa Fe Depot	N/A	96%	N/A	98%	N/A	92%	N/A	94%	N/A	92%
New Blue Line routing to America Plaza	N/A	92%	N/A	98%	N/A	90%	N/A	93%	N/A	91%

* 2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)
2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

Unlike in 2011, there were some differences in how ethnic groups rated the importance of the improvements that MTS had planned. These differences were particularly demonstrated by Hispanics. For instance, Hispanics were more likely than Caucasians indicate the following improvements were very important or important:

- *Real time trolley arrival signs at all the trolley stations*
- *Trolley renewal project to rebuild/improve the Blue Line*
- *Future mid-city bus rapid routes*

Hispanics were also more likely than African Americans to indicate *real time trolley arrival signs at all the trolley stations* and *future Mid-City Bus Rapid Transit routes* were important improvements to be made.

Chart 73
MTS Improvements – To Be Implemented In The Future
By Ethnicity

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)										
Ethnicity	Hispanic		Asian		Caucasian		African American		Other	
	2011	2013	2011	2013	2011	2013	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	82%	96%	79%	95%	87%	88%	81%	88%	85%	93%
Trolley Renewal Project to rebuild/improve the Blue Line	84%	92%	78%	90%	81%	82%	78%	87%	81%	94%
Future I-15 bus rapid transit routes	70%	84%	63%	83%	76%	78%	68%	76%	79%	92%
Future Mid-City Bus Rapid Transit routes	69%	89%	61%	85%	74%	80%	73%	80%	77%	88%
Future Mid-Coast Trolley extension to University City/UCSD	72%	86%	73%	88%	72%	84%	72%	82%	73%	91%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	92%	N/A	96%	N/A	89%	N/A	89%	N/A	96%
Ability to purchase a Day Pass using your mobile smart phone	N/A	78%	N/A	85%	N/A	76%	N/A	78%	N/A	76%

Whereas in 2011 there was slight variation in the top three reasons for riding public transit across ethnic groups, in 2013 the reasons were more consistent. *Save money* was highlighted by each group as the most important reason while *no car to use* and *price of fuel* were also included in the top three reasons given by all ethnicities. *Price of fuel* was a particularly important reason for Hispanics and Caucasians to take public transit while *no car to use* was more of a reason for African Americans.

Figure 18
Reasons for Taking Public Transit
By Ethnicity

(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit									
Hispanic		Asian		Caucasian		African American		Other	
2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**	2011*	2013**
Save Money (96%)	Save Money (73%)	Better for Environment (94%)	Save Money (73%)	Save Money (91%)	Save Money (71%)	Save Money (97%)	Save Money (75%)	Save Money (91%)	Save Money (75%)
Better for Environment (92%)	No Car to Use (69%)	Save Money (92%)	No Car to Use (52%)	Better for Environment (89%)	No Car to Use (63%)	Better for Environment (90%)	No Car to Use (74%)	Better for Environment (87%)	No Car to Use (62%)
Price of Fuel (89%)	Price of Fuel (40%)	Avoid Traffic (84%)	Price of Fuel (42%)	Price of Fuel (85%)	Price of Fuel (42%)	Price of Fuel (83%)	No Driver's License (34%)	Price of Fuel (80%)	Price of Fuel (35%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

By Rider Frequency

In this section, Frequent Riders and Infrequent Riders are defined as follows:

- Frequent Riders:
 - Regular Rider (3 or more times per week)
- Infrequent Riders:
 - Occasional Rider (1-10 times a month)
 - Infrequent Rider (Less than once a month)
 - New Rider (First time to ride San Diego MTS public transit)
 - Visitor – Just during my visit to San Diego

Both frequent and infrequent riders were significantly more satisfied overall with MTS in 2013. Frequent riders were also more likely to feel that *transit service in my area meets my needs*.

Chart 74
Overall Satisfaction with MTS
By Rider Frequency

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
MTS overall transit service	92%	98%	95%	99%
Transit service in my area meets my needs	90%	94%	93%	92%

Frequent riders were more likely to agree with four out of seven overall MTS statements in 2013, including:

- *MTS routes offer good frequency of service*
- *Transit centers are clean*
- *The cost of a pass or ticket is fair*
- *The Compass Card is easy to use and reload*

Chart 75
Feedback on MTS Overall
By Rider Frequency

Q10. Feedback on MTS Overall - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
MTS routes go where I need to go	95%	95%	97%	96%
MTS routes offer good frequency of service	82%	90%	93%	91%
Transit centers are clean	82%	90%	91%	94%
The cost of a pass or ticket is fair	79%	84%	80%	88%
The Compass Card is easy to use and reload	93%	97%	93%	94%
I am comfortable with other riders	85%	87%	86%	93%
There is enough room on MTS vehicles for riders in wheelchairs	77%	77%	79%	83%

Aside from frequent riders being more likely to agree that *MTS buses are comfortable* and the *hours of service of MTS bus routes are adequate* in 2013, bus perceptions were largely consistent between waves.

Chart 76
Feedback on MTS Buses
By Rider Frequency

Q10. Feedback on MTS Buses - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
MTS bus stops are clean	82%	85%	89%	88%
MTS buses I ride are clean	90%	90%	93%	93%
MTS buses are comfortable	85%	92%	88%	94%
MTS buses are easy to board	96%	95%	93%	98%
MTS bus operators are courteous	83%	85%	87%	89%
MTS buses I ride are always on time	62%	66%	73%	73%
The hours of service of MTS bus routes are adequate	69%	80%	76%	84%

Frequent riders were more likely to agree with six out of eight statements tested about the trolley in 2013.

Chart 77
Feedback on MTS Trolleys
By Rider Frequency

Q10. Feedback on MTS Trolleys - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
MTS trolley stations are clean	84%	91%	90%	90%
MTS trolleys I ride are clean	81%	91%	89%	88%
MTS trolleys are comfortable	89%	94%	92%	93%
MTS trolleys are easy to board	90%	95%	90%	96%
Bikes on the transit do not interfere with other riders	62%	75%	74%	79%
Onboard trolley security and fare inspectors are courteous	73%	79%	87%	87%
MTS trolleys I ride are always on time	77%	80%	84%	88%
MTS trolley lines hours of service are adequate	N/A	88%	N/A	91%

Both frequent and infrequent riders were less likely to use physical sources and more likely to use *mobile phone texting* in 2013, indicating a possible transition to technology-oriented transit information tools.

Frequent riders were more likely to use a number of online and phone sources than infrequent riders, including *MTS Trip Planner*, *Google Transit*, *www.511sd.com*, *telephone information*, *Info Express*, and *511*.

Chart 78
Use of Transit Information Tools
By Rider Frequency

Q11. Use of transit information tools - Please let me know if you use each of the following transit information tools.				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
Physical Source				
Rider Alert onboard flyers	34%	26%	27%	24%
MTS Moves Me onboard newsletter	21%	20%	23%	19%
The Transit Store (First & Broadway)	27%	29%	13%	24%
Trolley station signs	60%	62%	50%	56%
Bus and trolley printed schedules	77%	66%	73%	53%
Bus stop information signs	74%	59%	73%	54%
Regional transit map	47%	38%	35%	31%
Online Source				
www.sdmts.com	34%	40%	20%	35%
MTS Trip Planner at www.sdmts.com	31%	33%	21%	24%
MTS Twitter	3%	3%	2%	2%
MTS Facebook	3%	4%	5%	4%
MTS Trolley Renewal email	3%	3%	2%	5%
Google Transit	31%	25%	23%	13%
www.511sd.com	13%	7%	9%	2%
Phone Source				
Mobile phone texting/GO! MTS app	9%	33%	9%	27%
Telephone information (619)233-3004	27%	23%	17%	13%
Info Express (619)685-4900	14%	12%	4%	6%
511	26%	14%	11%	8%
TTY/TDD info line (619)234-5995	4%	3%	7%	1%

Frequent riders were more likely to find certain online sources helpful while infrequent riders were more likely to find certain phone sources helpful in 2013.

Frequent riders were more likely than infrequent riders to find The Transit store and www.sdmts.com helpful.

Chart 79
Helpfulness of Transit Information Tools
By Rider Frequency

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
Physical Source				
Rider Alert onboard flyers	78%	81%	83%	79%
MTS Moves Me onboard newsletter	83%	82%	88%	87%
The Transit Store (First & Broadway)	87%	89%	90%	67%
Trolley station signs	90%	91%	89%	90%
Bus and trolley printed schedules	89%	92%	89%	88%
Bus stop information signs	86%	92%	88%	85%
Regional transit map	94%	94%	86%	83%
Online Source				
www.sdmts.com	81%	89%	80%	77%
MTS Trip Planner at www.sdmts.com	83%	91%	80%	82%
MTS Twitter	81%	73%	48%	27%
MTS Facebook	75%	71%	56%	27%
MTS Trolley Renewal email	85%	69%	53%	54%
Google Transit	94%	87%	85%	71%
www.511sd.com	82%	87%	88%	100%
Phone Source				
Mobile phone texting/GO! MTS app	84%	91%	90%	91%
Telephone information (619)233-3004	87%	90%	80%	89%
Info Express (619)685-4900	80%	91%	79%	100%
511	76%	82%	82%	78%
TTY/TDD info line (619)234-5995	79%	94%	86%	100%

Infrequent riders were more satisfied with the *ease to get route or schedule information* in 2013 than in 2011, and were more likely than frequent riders to be satisfied with the *knowledge of customer service representatives*.

Chart 80
Satisfaction with Customer Service
By Rider Frequency

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use, N/A excluded)				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
Ease to get route or schedule information	95%	97%	93%	98%
Knowledge of customer service representatives	90%	91%	94%	96%
Ease of getting answers to issues or concerns	88%	91%	93%	93%

Satisfaction with the improvements MTS implemented in 2013 was high for both frequent and infrequent riders, with over 90% of both sub-groups indicating they were very satisfied or satisfied.

Infrequent riders were more likely than frequent riders to be satisfied with the *New Green Line*.

Chart 81
MTS Improvements – Implemented
By Rider Frequency

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below. *				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
Use mobile phone to get real time arrival for next bus or trolley	62%	98%	62%	96%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	N/A	94%	N/A	96%
Installation of security cameras on all bus and trolley vehicles	85%	97%	79%	99%
Increased number of low-floor trolleys	75%	97%	75%	95%
Increased number of low-floor buses	77%	98%	77%	99%
Transition for all monthly and day passes to Compass Card	88%	95%	72%	95%
New Green Line routing into downtown	N/A	94%	N/A	99%
New Orange Line routing to Santa Fe Depot	N/A	94%	N/A	98%
New Blue Line routing to America Plaza	N/A	92%	N/A	93%

*2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)

2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

Both frequent and infrequent riders were more likely to rate future improvements planned by MTS as important in 2013, likely given the length of time these improvements have been on the docket.

Chart 82
MTS Improvements – To Be Implemented In the Future
By Rider Frequency

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)				
Rider Frequency	Frequent Riders		Infrequent Riders	
	2011	2013	2011	2013
Real time trolley arrival signs at all trolley stations	85%	92%	80%	93%
Trolley Renewal Project to rebuild/improve the Blue Line	82%	88%	79%	89%
Future I-15 bus rapid transit routes	72%	82%	69%	79%
Future Mid-City Bus Rapid Transit routes	73%	85%	64%	86%
Future Mid-Coast Trolley extension to University City/UCSD	74%	85%	67%	86%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	N/A	91%	N/A	96%
Ability to purchase a Day Pass using your mobile smart phone	N/A	79%	N/A	73%

As was the case in 2011, *save money* was the most important reason for taking public transit for both frequent riders and infrequent riders in 2013. These groups also agreed that *price of fuel* was a top three reason.

Compared to 2011, both frequent riders and infrequent riders in 2013 were less likely cite *better for environment* as a top three most important reason for taking public transit and more likely to cite *no car to use*.

Figure 19
Reasons for Taking Public Transit
By Rider Frequency
 (Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit			
Frequent Riders*		Infrequent Riders**	
2011	2013	2011	2013
Save Money (95%)	Save Money (74%)	Save Money (92%)	Save Money (65%)
Better for Environment (91%)	No Car to Use (66%)	Better for Environment (91%)	No Car to Use (65%)
Price of Fuel (85%)	Price of Fuel (39%)	Price of Fuel (87%)	Price of Fuel (35%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an importance scale; scores shown are the sum of *very important* and *somewhat important*.

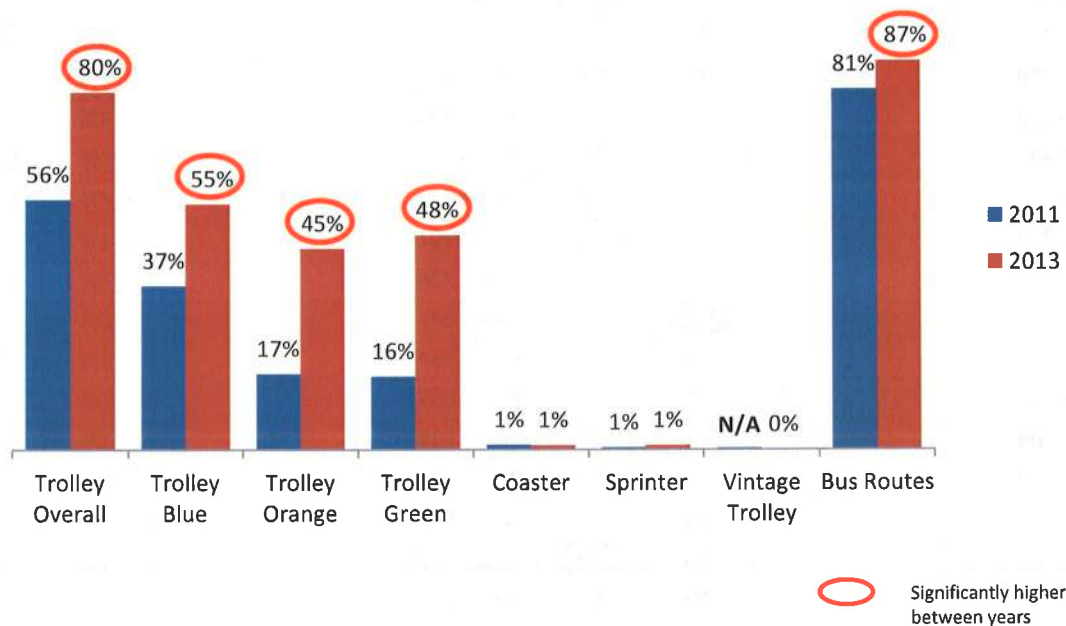
**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

Section 8: Detailed Findings – Ridership Background

In 2013, use of both the bus and trolley increased significantly from 2011.* Bus routes continued to be the most used of MTS services, with 87% of riders interviewed indicating they rode a bus in the past three months.

Trolley use, however, increased over 20% since 2011 and was used in the last three months by 80% of riders interviewed. The Blue Line continued to be the most frequently used trolley line in 2013, used by 55%.

Figure 20
Transit Service Used
(Q4. What transit services have you used in the last 3 months, including today?)



* 2011 – asked as two questions: What transit services are you using today? Select all that apply. + What other transit services have you used in the last 3 months including May? Select all that apply.
2013 – asked as one question: What transit services have you used in the last 3 months, including today? Select all that apply.

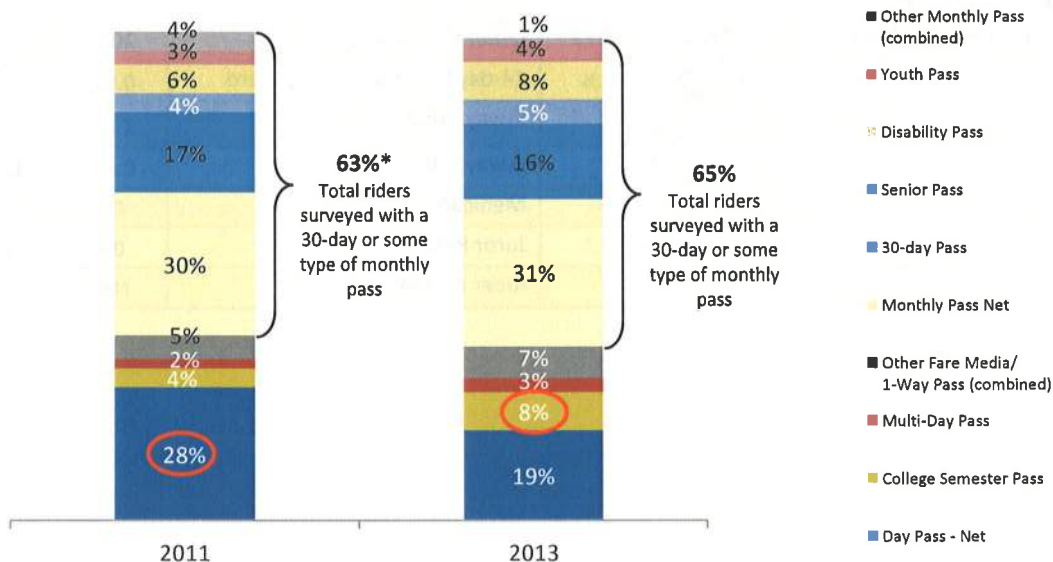
The following table shows ridership of specific bus routes:

Chart 83
Transit Bus Routes Used in Last 3 Months

Q4. What transit services have you used in the last 3 months, including today? Select all that apply.					
Route #	2011	2013	Route #	2011	2013
Route 30	6%	13%	Route 934	4%	3%
Route 11	15%	12%	Route 933	3%	3%
Route 929	10%	11%	Route 5	3%	3%
Route 15	8%	10%	Route 6	4%	3%
Route 7	15%	9%	Route 906	2%	3%
Route 955	5%	8%	Route 880	0%	2%
Route 4	4%	8%	Route 961	3%	2%
Route 13	4%	8%	Route 856	1%	2%
Route 8	1%	7%	Route 936	2%	2%
Route 201	1%	7%	Route 907	2%	2%
Route 901	5%	7%	Route 848	2%	2%
Route 810	2%	6%	Route 820	1%	2%
Route 2	5%	5%	Route 860	0%	2%
Route 150	4%	5%	Route 120	8%	2%
Route 712	4%	5%	Route 105	3%	2%
Route 44	5%	5%	Route 960	0%	1%
Route 3	5%	5%	Route 27	4%	1%
Route 202	1%	5%	Route 101	1%	2%
Route 1	7%	5%	Route 704	3%	1%
Route 10	12%	5%	Route 832	0%	1%
Route 20	7%	5%	Route 864	1%	1%
Route 932	5%	4%	Route 855	1%	1%
Route 709	3%	4%	Route 833	1%	1%
Route 962	2%	3%	Route 210	0%	1%
Route 9	5%	3%	Route 816	1%	1%
Route 963	1%	3%	Route 992	1%	1%
Route 204	0%	3%	Route 874	1%	1%
Route 701	5%	3%	Route 916	1%	1%
Route 41	7%	3%	Route 928	4%	1%
Route 815	2%	3%	Route 50	1%	1%
Route 115	2%	3%	Route 851	1%	1%
Route 28	1%	3%	Route 923	2%	1%
Route 35	3%	3%	Route 705	2%	1%
Route 905	1%	3%	Route 845	1%	1%

As in 2011, over half the riders surveyed (65%) had a 30-day or some type of *monthly pass* in 2013. *Day passes* were used by only 19% and down significantly from 2011 (28%).

Figure 21
Popular Fare Media Type
(Q5. How are you paying for yourself for this particular trip today? – Only fare media types with 3% or more in 2013 shown)



*Note: Some percentages may not add up due to rounding

8% Significantly higher between years

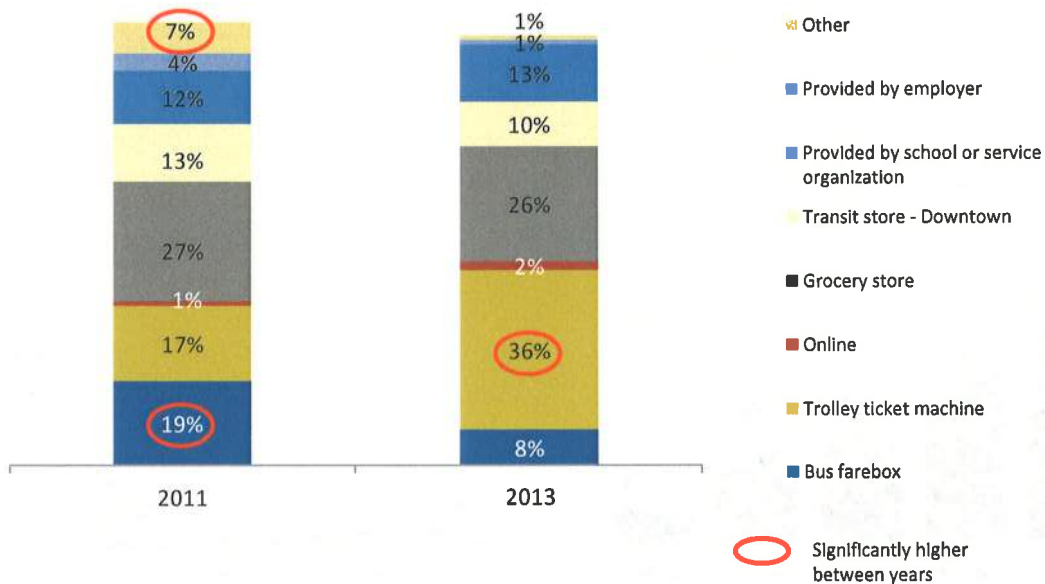
Other fare media types with less than 2.6% response are outlined in the table below:

Chart 84
Less Popular Fare Media Type
(Q5. How are you paying for yourself for this particular trip today? – Only fare media types with less than 2.6% shown)

Q5. Other Fare Media Type With Less than 2.6% Response in 2013 – How are you paying for yourself for this particular trip today?					
Other Monthly Fare Media	2011	2013	Other Fare Media/ 1-Way	2011	2013
College Monthly Pass	4%	1%	14-day Pass on Compass Card	0.5%	1.9%
			1-way Adult	1.2%	1.3%
			1-way S/D/M	0.6%	0.7%
			Medicare	0%	0.5%
			Juror Pass	0%	0%
			Rider Promotion	N/A	0%

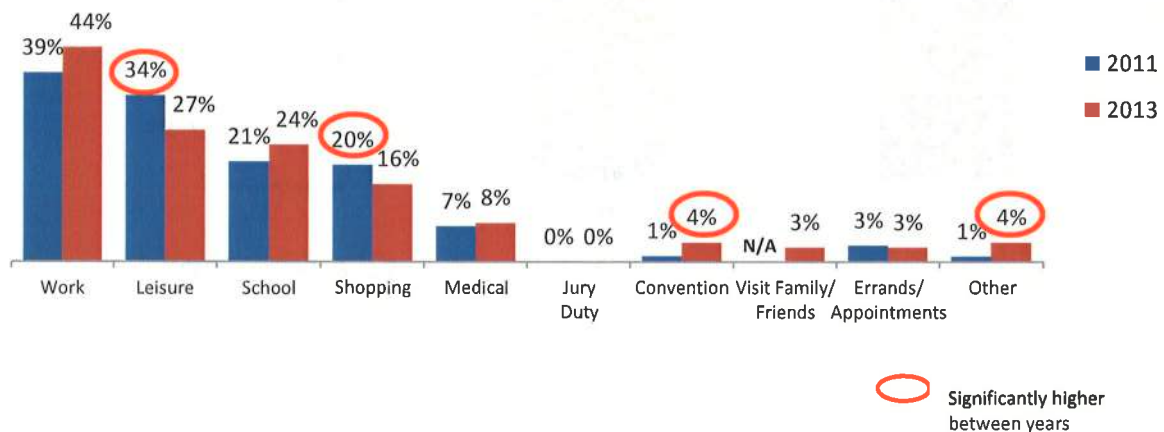
Purchases from *trolley ticket machines* more than doubled in 2013 when compared to 2011, making it the most used outlet. Fare purchases made in *grocery stores* remained on par with 2011 while purchases made at the *bus farebox* decreased significantly to 8% in 2013.

Figure 22
Ticket Purchase Location
 (Q6. Where did you get your one-way fare, ticket or pass for this trip today?)



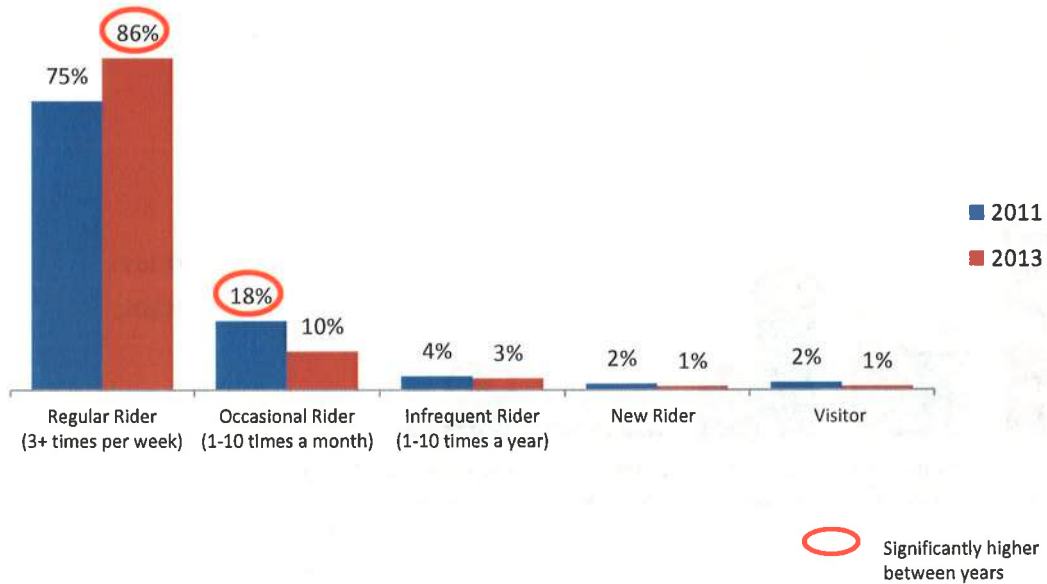
Work, leisure, and school continued to be the top three purposes for rider trips in 2013, though *leisure* was cited significantly less than it had been in 2011 (34%). *Shopping* was also cited less in 2013 than it had been in 2011 (16% in 2013 vs. 20% in 2011) while *convention* was cited more in 2013 (4% in 2013 vs. 1% in 2011).

Figure 23
Primary Purpose
(Q7. What is the purpose of any of your trips using public transit today?)



Regular ridership was up significantly from 2011 in 2013 while *occasional* ridership was down.

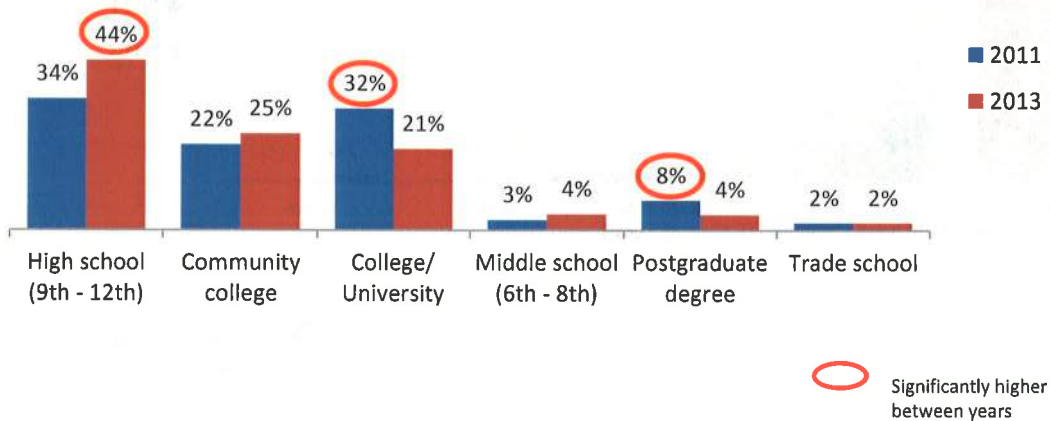
Figure 24
Rider Type
(Q8. Which best describes how often you ride public transit in San Diego?)



The percentage of riders who last or currently attended *high school* in 2013 was up significantly from 2011 while the percentage of riders who last or currently attended *college/university* was down. On par with 2011, one-fourth of riders last or currently attended *community college* in 2013.

Figure 25
Education

(Q17. Please indicate the last school you attended. If you are a student, select which school you are currently attending.)



The annual household incomes reported by riders in 2013 were on par with those reported in 2011. As in 2011, the majority (66%) reported having annual household incomes of less than \$30,000.

Figure 26
Annual Household Income
(Q18. Please indicate your annual household income.)



Appendix A: Routes of Interest

In 2013, MTS highlighted certain routes that were to undergo considerable changes in the near future as routes of particular interest. In this section, MTS evaluation and satisfaction scores are shown for respondents riding these routes of particular interest. This will provide a benchmark for the spring 2014 wave to better understand how changes to these routes impact customer attitudes. These routes included:

- 20
- 201/202/204
- 810/820/850
- 880

In the following tables, bold numbers indicate significantly a higher result when comparing routes of interest.

There was no difference in overall satisfaction with MTS between the riders of the specified routes of interest.

Chart 85
Overall Satisfaction with MTS
By Routes of Interest (2013)

Q15. Please indicate your level of satisfaction with the following services. (%=Very satisfied or satisfied)				
Routes of Interest	20	201/202/204	810/820/850	880
MTS overall transit service	91%	100%	97%	100%
Transit service in my area meets my needs	81%	97%	95%	75%

Riders on routes 810/820/850 were generally less likely to strongly agree or agree with *MTS routes go where I need to go, I am comfortable riding with other riders and there is enough room on MTS vehicles for riders in wheelchairs*. Riders on route 20 were also less likely to agree with *there is enough room on MTS vehicles for riders in wheelchairs*.

Chart 86
Feedback on MTS Overall
By Routes of Interest (2013)

Q10. <u>Feedback on MTS Overall</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Routes of Interest	20	201/202/204	810/820/850	880
MTS routes go where I need to go	81%	98%	70%	88%
MTS routes offer good frequency of service	80%	93%	89%	83%
Transit centers are clean	91%	98%	99%	100%
The cost of a pass or ticket is fair	71%	84%	94%	83%
The Compass Card is easy to use and reload	100%	95%	97%	97%
I am comfortable with other riders	93%	96%	66%	100%
There is enough room on MTS vehicles for riders in wheelchairs	59%	87%	62%	100%

Ratings were high (over 80% strongly agreed or agreed) across all routes of interest for five out of the seven bus related attributes. Despite this, agreement with *the hours of service of MTS bus routes are adequate* were significantly lower on route 880 while agreement *MTS buses I ride are always on time* was lower on route 20.

Also worth noting, riders on route 880 were more likely to agree with the statement *MTS bus operators are courteous* than riders on both route 20 and routes 201/202/204.

Chart 87
Feedback on MTS Buses
By Routes of Interest (2013)

Q10. <u>Feedback on MTS Buses</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Routes of Interest	20	201/202/204	810/820/850	880
MTS bus stops are clean	83%	95%	100%	100%
MTS buses I ride are clean	100%	100%	100%	100%
MTS buses are comfortable	82%	97%	100%	100%
MTS buses are easy to board	90%	100%	100%	96%
MTS bus operators are courteous	80%	91%	100%	100%
MTS buses I ride are always on time	44%	68%	92%	84%
The hours of service of MTS bus routes are adequate	100%	84%	93%	63%

Few riders (n<30) across all routes of interest except route 20 used MTS trolley service. Riders on the 20 bus were most likely to agree that *MTS trolleys are easy to board* and *MTS trolley stations are clean*. They were least likely to agree that *onboard trolley security and fare inspectors are courteous*.

Chart 88
Feedback on MTS Trolleys
By Routes of Interest

Q10. <u>Feedback on MTS Trolleys</u> - Please let me know how much you agree or disagree with the following statements. (%=Strongly agree or agree; Don't use, N/A excluded)				
Routes of Interest	20	201/202/204	810/820/850	880
MTS trolley stations are clean	91%	79%	98%	100%
MTS trolleys I ride are clean	87%	91%	100%	100%
MTS trolleys are comfortable	88%	100%	100%	100%
MTS trolleys are easy to board	100%	100%	100%	95%
Bikes on the transit do not interfere with other riders	74%	49%	100%	95%
Onboard trolley security and fare inspectors are courteous	62%	73%	100%	95%
MTS trolleys I ride are always on time	88%	85%	98%	100%
MTS trolley line hours of service are adequate	85%	93%	100%	95%

With the exception of route 20, use of each transit information tool was relatively consistent across each of the routes of interest and *www.sdmts.com website* was the most used tool across these routes. *Bus stop signs* were consistently used across all routes of interest, including route 20.

Chart 89
Use of Transit Information Tools
By Routes of Interest

Q11. <u>Use of transit information tools</u> - Please let me know if you use each of the following transit information tools.				
Routes of Interest	20	201/202/204	810/820/850	880
Physical Source				
Rider Alert onboard flyers	43%	29%	50%	45%
MTS Moves Me onboard newsletter	21%	16%	33%	28%
The Transit Store (First & Broadway)	55%	17%	47%	0%
Trolley station signs	84%	49%	12%	13%
Bus and trolley printed schedules	88%	43%	30%	70%
Bus stop information signs	79%	65%	37%	65%
Regional transit map	72%	28%	15%	54%
Online Source				
www.sdmts.com	39%	53%	78%	61%
MTS Trip Planner at www.sdmts.com	11%	35%	25%	12%
MTS Twitter	0%	--	0%	12%
MTS Facebook	0%	--	0%	--
MTS Trolley Renewal email	0%	1%	0%	--
Google Transit	30%	21%	3%	41%
www.511sd.com	11%	1%	0%	28%
Phone Source				
Mobile phone texting/GO! MTS app	19%	32%	5%	29%
Telephone information (619)233-3004	19%	9%	2%	29%
Info Express (619)685-4900	11%	2%	1%	0%
511	11%	5%	8%	39%
TTY/TDD info line (619)234-5995	--	--	0%	0%

Riders of all routes except route 880 gave consistently positive ratings toward each tool. Route 880 riders gave significantly lower ratings on the following tools:

- *Mobile phone texting/GO! MTS app*
- *Trolley station signs*
- *www.sdmts.com website*
- *511*

Chart 90
Helpfulness of Transit Information Tools
By Routes of Interest

Q11. Helpfulness of Information Tools - Please let me how helpful they are. (%=Helpful)				
Routes of Interest	20	201/202/204	810/820/850	880
Physical Source				
Rider Alert onboard flyers	51%	90%	100%	44%
MTS Moves Me onboard newsletter	48%	82%	91%	58%
The Transit Store (First & Broadway)	80%	82%	93%	1%
Trolley station signs	87%	98%	100%	5%
Bus and trolley printed schedules	100%	100%	100%	86%
Bus stop information signs	100%	100%	100%	86%
Regional transit map	100%	100%	79%	88%
Online Source				
www.sdmts.com	100%	95%	95%	40%
MTS Trip Planner at www.sdmts.com	100%	96%	100%	72%
MTS Twitter	100%	--	100%	--
MTS Facebook	100%	--	100%	--
MTS Trolley Renewal email	100%	--	100%	--
Google Transit	100%	94%	100%	77%
www.511sd.com	100%	100%	50%	57%
Phone Source				
Mobile phone texting/GO! MTS app	100%	100%	100%	30%
Telephone information (619)233-3004	100%	100%	100%	69%
Info Express (619)685-4900	100%	100%	100%	100%
511	100%	100%	60%	34%
TTY/TDD info line (619)234-5995	--	--	100%	--

Ratings of customer service across the routes of interest were generally consistent. An exception to this was the lower ratings given by riders of the 810/820/850 to the statement *ease to get route or schedule information*.

Chart 91
Satisfaction with Customer Service
By Routes of Interest

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service. (%=Very satisfied or satisfied; Don't use N/A excluded)				
Routes of Interest	20	201/202/204	810/820/850	880
Ease to get route or schedule information	87%	100%	89%	100%
Knowledge of customer service representatives	75%	87%	84%	87%
Ease of getting answers to issues or concerns	87%	93%	72%	87%

In general, satisfaction with the improvements implemented by 2013 was consistently high across the routes of interest. One exception:

- Route 880 riders were significantly less satisfied with the *use of mobile phone to get real time arrival for next bus or trolley*.

Chart 92
MTS Improvements – Implemented
By Routes of Interest

Q13A. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives below. (%=Very satisfied or satisfied; Don't use, N/A excluded)				
Routes of Interest	20	201/202/204	810/820/850	880
Use mobile phone to get real time arrival for next bus or trolley	100%	97%	99%	43%
Trolley Renewal Project to rebuild/improve Orange and Green Lines	90%	100%	100%	99%
Installation of security cameras on all bus and trolley vehicles	100%	100%	100%	100%
Increased number of low-floor trolleys	100%	100%	100%	100%
Increased number of low-floor buses	100%	99%	100%	99%
Transition for all monthly and day passes to Compass Card	90%	95%	100%	100%
New Green Line routing into downtown	100%	100%	100%	100%
New Orange Line routing to Santa Fe Depot	100%	100%	100%	100%
New Blue Line routing to America Plaza	100%	100%	99%	100%

* 2011 – not yet implemented as of 2011 (%=Very important/important, no opinion excluded)
2013 – implemented as of 2013 (%=Very satisfied or satisfied, no opinion excluded)

For the most part, there was little variation in the importance ratings given to each planned improvement across the routes of interest. An exception to this was the significantly higher ratings assigned to *future I-15 bus rapid transit routes* by riders of routes 810/820/850 and 880.

Chart 93
MTS Improvements – To Be Implemented
By Routes of Interest

Q13B. MTS will be completing or implementing a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be. (%=Very important or important; No opinion excluded)				
Routes of Interest	20	201/202/204	810/820/850	880
Real time trolley arrival signs at all trolley stations	79%	81%	96%	76%
Trolley Renewal Project to rebuild/improve the Blue Line	79%	80%	93%	88%
Future I-15 bus rapid transit routes	78%	71%	100%	100%
Future Mid-City Bus Rapid Transit routes	88%	77%	93%	86%
Future Mid-Coast Trolley extension to University City/UCSD	100%	88%	95%	88%
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	100%	94%	95%	88%
Ability to purchase a Day Pass using your mobile smart phone	68%	78%	89%	56%

Save money was the number one reason for taking public transit for all routes of interest while *price of fuel* was rate as a top three reason by all riders of all routes except route 20.

Figure 27
Reasons for Taking Public Transit
By Routes of Interest
(Q14. Which of the following are important in your decision to ride public transit?)

Top 3 Reasons For Taking Public Transit**			
20	201/202/204	810/820/850	880
Save Money (65%)	Save Money (74%)	Save Money (90%)	Save Money (72%)
No Car to Use (60%)	No Car to Use (59%)	Price of Fuel (69%)	Avoid Traffic (61%)
Avoid Traffic (36%)	Price of Fuel (50%)	Better for Environment (44%)	Price of Fuel (49%)

****Note:** Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most important reasons.

Appendix B: Questionnaires

This appendix contains the questionnaires used for the survey. The first is the English and the second is the Spanish version of the questionnaire.

English Questionnaire



MTS Customer Satisfaction Survey 2013

ZONE _____ TROLLEY/BUS _____ HOUR _____ DATE _____ INTERVIEWER _____

My name is _____ and I work for Luth Research, an independent market research company here in San Diego. We are conducting a brief survey on behalf of San Diego Metropolitan Transportation System (MTS) and ask for your help. By answering this 10 minute survey you can help MTS understand what you think of the transportation services you receive now and how they can meet your expectations in the future.

QA. Are you an employee of MTS?

- ☐ Yes → Thank you, but MTS employees cannot complete this survey
- ☐ No

QB. Have you already participated in this research study in 2013?

- ☐ Yes → Thank you, but each MTS rider can only complete the survey once
- ☐ No

Q1. What is your gender?

- ☐ Male ☐ Female

Q2. Which of the following best describes your ethnicity? Please select only one.

- | | |
|---|---|
| <input type="checkbox"/> Hispanic | <input type="checkbox"/> Black/African-American |
| <input type="checkbox"/> Asian | <input type="checkbox"/> Pacific Islander |
| <input type="checkbox"/> White (not Hispanic) | <input type="checkbox"/> Multiple Ethnicities |
| <input type="checkbox"/> Other, specify _____ | |
| <input type="checkbox"/> Decline to Answer | |

Q3. In which year were you born? (INTERVIEWER NOTE: Must have been born 2000 or before)

- ☐ I was born in _____
- ☐ Decline to Disclose

Tell me about your trip today

Q4. What transit services have you used in the last 3 months, including today? Select all that apply.

- | | |
|---|--|
| <input type="checkbox"/> Trolley Blue | <input type="checkbox"/> Vintage Trolley |
| <input type="checkbox"/> Trolley Orange | <input type="checkbox"/> Sprinter |
| <input type="checkbox"/> Trolley Green | <input type="checkbox"/> Coaster |
| <input type="checkbox"/> Bus Routes, list UP TO 5 individual bus routes you are riding today and/or most frequently, e.g. Route 1 | |

Bus Route(s): _____



MTS Customer Satisfaction Survey 2013

Q5. How are you paying for yourself for this particular trip today? Select only one.

- | | |
|---|--|
| <input type="checkbox"/> Day Pass (1-Day) - Paper | <input type="checkbox"/> College Semester Pass |
| <input type="checkbox"/> Day Pass (1-Day) - Compass Card | <input type="checkbox"/> College Monthly Pass |
| <input type="checkbox"/> Multi-Day Pass (2, 3, or 4 Days) | <input type="checkbox"/> 1-way Adult |
| <input type="checkbox"/> Monthly Pass | <input type="checkbox"/> 1-way S/D/M |
| <input type="checkbox"/> 14-day Pass | <input type="checkbox"/> Juror Pass |
| <input type="checkbox"/> 30-day Pass | <input type="checkbox"/> Other, specify _____ |
| <input type="checkbox"/> Senior Pass (60 & Older) | <input type="checkbox"/> Rider Promotion (Friends Ride Free, Family Weekend, Other) |
| <input type="checkbox"/> Disability Pass (disabled) | |
| <input type="checkbox"/> Medicare Pass | |
| <input type="checkbox"/> Youth Pass | |

Q6. Where did you get your one-way fare, ticket or pass for this trip today? Select only one.

- | | |
|---|--|
| <input type="checkbox"/> Bus Farebox | <input type="checkbox"/> Transit Store - Downtown |
| <input type="checkbox"/> Trolley Ticket Machine | <input type="checkbox"/> Transit Store - North County |
| <input type="checkbox"/> Online | <input type="checkbox"/> Provided by School or Social Service Organization |
| <input type="checkbox"/> Albertsons Grocery Store | <input type="checkbox"/> Provided by Employer |
| <input type="checkbox"/> Other Pass Outlet | <input type="checkbox"/> Other, specify _____ |

Q7. What is the purpose of any of your trips using public transit today? Select all that apply.

- ☐ Work
- ☐ School
- ☐ Shopping
- ☐ Convention
- ☐ Leisure
- ☐ Jury Duty
- ☐ Medical
- ☐ Other, specify _____



MTS Customer Satisfaction Survey 2013

Tell me how you generally use San Diego MTS public transit system.

Q8. Which best describes how often you ride public transit in San Diego? Select only one.

- ☐ Regular Rider (3 or more times per week)
- ☐ Occasional Rider (1-10 times a month)
- ☐ Infrequent Rider (Less than once a month)
- ☐ New Rider (First time to ride San Diego MTS public transit)
- ☐ Visitor - Just during my visit to San Diego

Q10. Please let me know how much you agree or disagree with the following statements.

Please check one box for each line:	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Use/N/A
MTS Routes go where I need to go.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Routes offer good frequency of service.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transit Centers are clean.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The cost of a pass or ticket is fair.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Compass Card is easy to use and reload.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am comfortable riding with other passengers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There is enough room on MTS vehicles for riders in wheelchairs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

INTERVIEWER NOTE: IF YOU DO NOT USE BUSES, GO TO NEXT SECTION (Indicated in Q4)

<u>Feedback on MTS Buses</u>	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Use/N/A
Please check one box for each line:					
MTS bus stops are clean.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS buses I ride are clean.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS buses are comfortable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS buses are easy to board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS bus operators are courteous.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS buses I ride are always on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The hours of service of MTS bus routes are adequate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



MTS Customer Satisfaction Survey 2013

INTERVIEWER NOTE: IF YOU DO NOT USE TROLLEYS, GO TO NEXT QUESTION (Indicated in Q4)

Feedback on MTS Trolleys Please check one box for each line:	Strongly Agree	Agree	Disagree	Strongly Disagree	Don't Use/N/A
MTS trolley stations are clean	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS trolleys I ride are clean.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS trolleys are comfortable.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS trolleys are easy to board.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bikes on the trolleys do not interfere with other riders.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Onboard trolley security and fare inspectors are courteous.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS trolleys I ride are always on time.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS trolley lines hours of service are adequate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q11. Please let me know if you use each of the following transit information tools and how helpful they are/would be.

	Use	Don't Use	Not Helpful	Somewhat Helpful	Helpful
Rider Alert onboard Flyers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Moves Me onboard newsletter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
www.sdmts.com website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Trip Planner at www.sdmts.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Twitter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Facebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Trolley Renewal email updates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Transit Store (First & Broadway)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trolley Station signs (Map, Schedule, and How to Ride displays)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bus and Trolley printed timetables	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Use	Don't Use	Not Helpful	Somewhat Helpful	Helpful
Bus Stop information signs (Map and schedule display)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Regional Transit Map	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Google Transit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mobile phone texting or GO! MTS app for Smartphones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Telephone Information (619) 233-3004	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Info Express (619) 685-4900	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



MTS Customer Satisfaction Survey 2013

Use	Don't Use	Not Helpful	Somewhat Helpful	Helpful	Use
511	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
www.511sd.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TTY/TDD Info Line (619) 234-5995 (Used for hearing impaired)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service.

Please check one box for each line:	Very Satisfied	Satisfied	Not Satisfied	Not Satisfied At All	Don't Use/N/A
Ease to get route or schedule information	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ease of getting answers to issues or concerns	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledge of customer service representatives	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q13a. MTS has implemented a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how satisfied you are with each of the initiatives listed below.

Please check one box for each line:	Very Satisfied	Satisfied	No Satisfied	Not Satisfied At All	Don't Use/N/A
Use mobile phone to get real time arrival for next bus or trolley	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Trolley Renewal Project to rebuild stations, improve ride quality, and add low-floor trolley vehicles on the Orange and Green Lines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Green Line routing into downtown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Orange Line routing to Santa Fe Depot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New Blue Line routing to America Plaza	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transition for all monthly and day passes to Compass Card	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Installation of security cameras on all bus and trolley vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased number of low-floor trolleys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased number of low-floor buses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



MTS Customer Satisfaction Survey 2013

Q13b. MTS will be completing or implement a variety of projects in the future to improve the bus and trolley system and the passenger experience and ease of use. Please let me know on the initiatives below how important you think they will be.

Please check one box for each line:	Very Important	Important	Somewhat Important	Not Important	No opinion
Real time Trolley arrival signs at all Trolley Stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ability to purchase a Day Pass using your Mobile Smart Phone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future I-15 Bus Rapid Transit Routes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future Mid City Bus Rapid Transit Routes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Future Mid-Coast Trolley Extension to University City/UCSD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order up to 500 CNG (Clean Natural Gas) buses to replace old diesel buses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Trolley Renewal on the Blue Line to rebuild stations, improve ride quality and introduce low floor Trolley vehicles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q14. Which of the following are important in your decision to ride public transit? What are your TOP 3 reasons?

- ☐ No car to use for this trip
- ☐ Save money
- ☐ Price of fuel
- ☐ Price of parking
- ☐ Avoid traffic congestion
- ☐ Better for environment
- ☐ Allows me to get around and go to places I wouldn't otherwise be able to travel around due to disability.
- ☐ Do not have driver's license
- ☐ Other, please specify _____

Q15. Please indicate your level of satisfaction with the following areas of service.

Please check one box for each line:	Very Satisfied	Satisfied	Dissatisfied	Very Dissatisfied
MTS overall transit service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transit service in my area meets my needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



MTS Customer Satisfaction Survey 2013

Q17. Please indicate the last school you attended. If you are a student, select which school you are currently attending. Please select only one answer.

- ☐ Middle school (6th – 8th grade)
- ☐ High school (9th – 12th grade)
- ☐ 2 Year Community college
- ☐ 4 Year College/University
- ☐ Postgraduate degree
- ☐ Trade school
- ☐ Decline to Answer

Q18. Please indicate your annual household income. Please select only one answer.

- ☐ Less than \$15,000
- ☐ \$15,000 to \$19,999
- ☐ \$20,000 to \$24,999
- ☐ \$25,000 to \$29,999
- ☐ \$30,000 to \$34,999
- ☐ \$35,000 to \$39,999
- ☐ \$40,000 to \$44,999
- ☐ \$45,000 to \$49,999
- ☐ \$50,000 to \$74,999
- ☐ \$75,000 to \$99,999
- ☐ \$100,000 to \$149,999
- ☐ \$150,000 or more
- ☐ Decline to Answer
- ☐ Don't know

Q19. Please let me know if you have any other comments or suggestions about MTS service or projects.



MTS Customer Satisfaction Survey 2013

Q20. Please provide the following information: (The information you provide below will only be used for classification purposes or to follow up on information missing from your survey)

First Name _____

First Initial of Last Name _____

City/Town/Neighborhood: _____

ZIP/Postal Code: _____

Name of Hotel (if applicable/visitor): _____

Name of Military Base (if applicable): _____

Phone number (optional): (_____) _____ - _____

Email Address _____

Spanish Questionnaire



Sondeo de satisfacción del cliente MTS del 2013

ZONA _____ TROLLEY/AUTOBÚS _____ HORA _____ FECHA _____ ENTREVISTADOR _____

Mi nombre es _____ y yo trabajo para Luth Research, una compañía independiente de estudio de mercado aquí en San Diego. Estamos realizando un breve sondeo de parte de San Diego Metropolitan Transportation System (MTS) y pedimos su ayuda. Al contestar este sondeo de 10 minutos usted puede ayudar MTS a entender que piensa usted sobre los servicios de transporte que recibe hoy y como pueden cumplir sus expectativas en el futuro.

Pr.A. ¿Es usted un empleado de MTS?

- ☐ Sí → Gracias, pero empleados de MTS no pueden completar este sondeo
- ☐ No

Pr.B. ¿Usted ya ha participado en este estudio en el año 2013?

- ☐ Sí → Gracias, pero cada pasajero MTS solo puede completar un sondeo
- ☐ No

Pr.C. ¿En qué año nació? (año 2000 o antes)

- ☐ Yo nací en el año _____. Si nació después de 2000 → Gracias, pero los nacidos después de 2000 no se puede completar la encuesta
- ☐ Se niega a responder → Gracias, pero debe revelar su edad para completar esta encuesta.

P1. ¿Cuál es su sexo?

- ☐ Hombre ☐ Mujer

P2. ¿Cuál de los siguientes mejor describe su origen étnico? Favor de solo seleccionar uno.

- ☐ Hispano ☐ Afroamericano
- ☐ Asiático ☐ Isleño del Pacífico
- ☐ Blanco (no Hispano) ☐ Más de un origen étnico
- ☐ Otro, especifique _____
- ☐ Se niega a responder

P3. Retirado a propósito

Dígame sobre su viaje hoy

P4. ¿Cuales servicios tránsito ha utilizado en los últimos 3 meses, incluyendo hoy? Seleccione todos los que se aplique.

- ☐ Trolley Blue ☐ Antiguo Trolley
- ☐ Trolley Orange ☐ Sprinter
- ☐ Trolley Green ☐ Coaster
- ☐ Rutas de autobús, escriba HASTA 5 rutas de autobús individuales que está tomando hoy y/o más frecuentemente, p. ej. ruta 1

Ruta(s) de autobús: _____



Sondeo de satisfacción del cliente MTS del 2013

P5. ¿Cómo está pagando usted por su viaje particular hoy? Solo seleccione uno.

- | | |
|---|---|
| <input type="checkbox"/> Pase de un día (1 día) - papel | <input type="checkbox"/> Pase de jóvenes |
| <input type="checkbox"/> Pase de un día (1 día) – Compass Card | <input type="checkbox"/> Pase de semestre universitario |
| <input type="checkbox"/> Pase de varios días (2, 3, o 4 días) | <input type="checkbox"/> Pase mensual universitario |
| <input type="checkbox"/> Pase mensual | <input type="checkbox"/> Pasaje de una dirección – adulto |
| <input type="checkbox"/> Pase de 14 días | <input type="checkbox"/> Pasaje de una dirección – S/D/M |
| <input type="checkbox"/> Pase de 30 días | <input type="checkbox"/> Pase de jurado |
| <input type="checkbox"/> Pase de personas mayores (60 años de edad o más) | <input type="checkbox"/> Otro, especifique _____ |
| <input type="checkbox"/> Pase de discapacitado (discapacitado) | <input type="checkbox"/> Promoción del pasajero (amigos viajan gratis, fin de semana para la familia, otro) |
| <input type="checkbox"/> Pase de Medicare | |

P6. ¿Dónde conseguiste tu pasaje de una dirección, boleto, o pase para este viaje hoy? Solo seleccione uno.

- | | |
|---|---|
| <input type="checkbox"/> Máquina de pasajes en el autobús | <input type="checkbox"/> Transit Store – centro de San Diego |
| <input type="checkbox"/> Maquina dispensadora de boletos de Trolley | <input type="checkbox"/> Transit Store – condado norte |
| <input type="checkbox"/> En línea | <input type="checkbox"/> Proporcionado por la escuela u organización de servicio social |
| <input type="checkbox"/> Tienda Albertsons | <input type="checkbox"/> Proporcionar por el empleador |
| <input type="checkbox"/> Otro medio de pasajes | <input type="checkbox"/> Otro, especifique _____ |

P7. ¿Cuál es el propósito de cualquiera de sus viajes hoy utilizando transporte público? Seleccione todos los que se aplique.

- | | |
|-------------------------------------|--|
| <input type="checkbox"/> Trabajo | <input type="checkbox"/> Placer |
| <input type="checkbox"/> Escuela | <input type="checkbox"/> Servicio de jurado |
| <input type="checkbox"/> Compras | <input type="checkbox"/> Médico |
| <input type="checkbox"/> Convención | <input type="checkbox"/> Otro, especifique _____ |



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Dígame en general como usa el sistema de transito publico MTS de San Diego.

Q8. ¿Cuál mejor describe que tan frecuentemente toma el transito público en San Diego? Solo seleccione uno.

- ☐ Pasajero regular (3 o más veces a la semana)
- ☐ Pasajero ocasional (1-10 veces al mes)
- ☐ Pasajero infrecuente (menos de una vez al mes)
- ☐ Nuevo pasajero (primera vez tomando transporte público en San Diego)
- ☐ Visitante – solo durante mi visita a San Diego

(P9 combinado con P4)

P10. Favor de dejarme saber cuánto está de acuerdo o no de acuerdo con las siguientes declaraciones.

Favor de escoger una opción para cada línea:	Totalmente de acuerdo	De acuerdo	En desacuerdo	Totalmente en desacuerdo	No uso/no se aplica
Rutas de MTS van a donde necesito ir.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rutas de MTS ofrecen bastante frecuencia de servicio.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Centros tránsito están limpios.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
El costo de un pase o boleto es justo.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
El Compass Card es fácil de usar y recargar.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Me siento cómodo viajando con otros pasajeros.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hay suficiente espacio en los vehículos MTS para los pasajeros en sillas de rueda.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

SI NO USAS LOS AUTOBUSES, FAVOR DE PASAR A LA PRÓXIMA SECCIÓN

<u>Comentarios sobre autobuses MTS</u> Favor de escoger una opción para cada línea:	Totalmente de acuerdo	De acuerdo	En desacuerdo	Totalmente en desacuerdo	No uso/no se aplica
Paradas de autobús MTS están limpias.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Autobuses de MTS que tomo yo están limpios.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Autobuses de MTS están cómodos.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Es fácil subir a los autobuses de MTS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los choferes de autobuses MTS son corteses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los autobuses MTS que yo tomo siempre están a tiempo.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los horarios de servicio de las rutas de autobuses MTS son adecuadas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Sondeo de satisfacción del cliente MTS del 2013

SI NO USA LOS TROLLEYS, FAVOR DE PASAR A LA PRÓXIMA PREGUNTA

Comentarios sobre trolleys MTS Favor de escoger una opción para cada línea:	Totalmente de acuerdo	De acuerdo	En desacuerdo	Totalmente en desacuerdo	No uso/no se aplica
Las estaciones de trolley MTS están limpias.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los trolleys MTS que tomo yo están limpios.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los trolleys MTS están cómodos.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Es fácil de subir a los trolleys MTS.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bicicletas en los trolleys no interfieren con otros pasajeros.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La seguridad aborde del trolley e inspectores de pasajes son corteses.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los trolleys MTS que yo tomo siempre están a tiempo.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Los horarios de servicio de las líneas de trolley MTS son adecuadas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P11. Favor de dejarme sabe si usa cualquiera de las siguientes recursos de información transita y que tan útiles son.

	Uso	No uso	No es útil	Un poco útil	Útil
Rider Alert folletos abordo los vehículos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Moves Me hoja informativa abordo los vehículos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sitio web www.sdmts.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Trip Planner en www.sdmts.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Twitter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MTS Facebook	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Correo electrónico con noticias sobre la renovación del trolley MTS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
The Transit Store (Calle Primera y Broadway en el centro de San Diego)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Letreros en las estaciones de Trolley (mapa, horario, y carteleros Como Viajar)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Horarios impresos del autobús y Trolley	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Uso	No uso	No es útil	Un poco útil	Útil
Letreros de información en la parada de autobús (carteleros con mapa y horario)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mapa transito regional	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Google Transit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mensajes de texto por teléfono móvil o la aplicación GO! MTS para teléfonos inteligentes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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	Uso	No uso	No es útil	Un poco útil	Útil
Información telefónica (619) 233-3004	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Info Express (619) 685-4900	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
511	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
www.511sd.com	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Línea informativa TTY/TDD (619) 234-5995	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P12. Favor de dejarme saber que tan satisfecho o insatisfecho está con los siguientes aspectos de servicio al cliente de MTS.

Favor de marcar una opción para cada línea:	Muy satisfecho	Satisfecho	No satisfecho	Muy insatisfecho	No uso/no se aplica
Facilidad de obtener información sobre horario o ruta	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Facilidad de obtener respuestas a los asuntos o preocupaciones	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sabiduría de los representativos de servicio al cliente	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P13a. MTS ha implementado una variedad de proyectos para mejorar el sistema de autobús y Trolley y la experiencia del pasajero y facilidad de uso. Favor de dejarme saber que tan satisfecho estás con cada una de las iniciativas detalladas al seguir.

Favor de marcar una opción para cada línea:	Muy satisfecho	Satisfecho	No satisfecho	Muy insatisfecho	Ninguna opinión
Usar teléfono móvil para recibir información de tiempo real sobre la llegada del próximo autobús o Trolley	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
El proyecto de renovación del Trolley para reconstruir estaciones, mejorar la calidad de viajes, y añadir trenes de Trolley con piso bajo en Orange y Green Line.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nueva ruta Green Line viajando al centro de San Diego	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nueva ruta Green Line viajando a Santa Fe Depot	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nueva ruta Blue Line viajando a American Plaza	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transición de todos los pases diarios y mensuales a Compass Card	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Instalación de cámaras de seguridad en todos los autobuses y Trolleys	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mayor cantidad de Trolleys con piso bajo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mayor cantidad de autobuses con piso bajo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Sondeo de satisfacción del cliente MTS del 2013

P13b. MTS estará completando o implementando una variedad de proyectos en el futuro para mejorar el sistema de autobús y Trolley y la experiencia del pasajero y facilidad de uso. Favor de dejarme saber en las iniciativas al seguir que tan importante crees que serán.

Favor de marcar una opción para cada línea:	Muy importante	Importante	Un poco importante	No importante	Ninguna opinión
Letreros con las llegadas en tiempo real en todas las estaciones del Trolley	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Habilidad de comprar un pase de un día usando su teléfono inteligente	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Futuras rutas de autobús de tránsito rápido I-15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Futuras rutas de autobús de tránsito rápido Mid-City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Futura extensión del Trolley Mid-Coast a University City/UCSD	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordenar hasta 500 autobuses de gas natural comprimido (CNG, por sus siglas en inglés) para reemplazar los viejos autobuses de diésel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Renovación del trolley en Blue Line para reconstruir estaciones, mejorar la calidad de viaje, y brindar Trolleys con piso bajo	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P14. ¿Cuáles de los siguientes son importantes en su decisión de tomar tránsito público? Cuáles son sus 3 razones MÁS importantes?

- ☐ No tengo coche para usar en este viaje
- ☐ Ahorrar dinero
- ☐ Costo de gasolina
- ☐ Costo de estacionamiento
- ☐ Evitar congestión de tráfico
- ☐ Mejora para el medioambiente
- ☐ Me permite viajar y visitar lugares que de otra manera no pudiera visitar debido a discapacidad.
- ☐ No tengo licencia de manejo
- ☐ Otro, favor de especificar _____



Sondeo de satisfacción del cliente MTS del 2013

P15. Favor de indicar su nivel de satisfacción con las siguientes áreas de servicio.

Favor de marcar una opción para cada línea:	Muy satisfecho	Satisfecho	Insatisfecho	Muy insatisfecho
Servicio tránsito MTS en general	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Servicio tránsito en mi área satisfacer mis necesidades	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

P17. Favor de indicar la última escuela que asistió. Si eres un alumno, selecciona la escuela a la cual actualmente asistes. Favor de seleccionar solo una respuesta.

- | | |
|---|--|
| <input type="checkbox"/> Escuela secundaria (sexto-octavo año) | <input type="checkbox"/> Título de postgrado |
| <input type="checkbox"/> Escuela preparatoria (novenio-doceavo año) | <input type="checkbox"/> Instituto profesional |
| <input type="checkbox"/> Universidad comunitaria | <input type="checkbox"/> Se niega a responder |
| <input type="checkbox"/> Universidad | |

P18. Favor de indicar sus ingresos anuales. Favor de solo seleccionar una respuesta.

- ☐ Menos de \$15,000
- ☐ \$15,000 a \$19,999
- ☐ \$20,000 a \$24,999
- ☐ \$25,000 a \$29,999
- ☐ \$30,000 a \$34,999
- ☐ \$35,000 a \$39,999
- ☐ \$40,000 a \$44,999
- ☐ \$45,000 a \$49,999
- ☐ \$50,000 a \$74,999
- ☐ \$75,000 a \$99,999
- ☐ \$100,000 a \$149,999
- ☐ \$150,000 o más
- ☐ Se niega a responder
- ☐ No se

P19. Favor de dejarme saber si tiene algún otro comentario o sugerencia sobre el servicio o los proyectos de MTS.

P20. ¿Cuál es la ciudad y código postal o ubicación donde actualmente reside?

Nombre _____

Ciudad/Pueblo/Vecindad: _____

ZIP/código postal: _____

Nombre de hotel (si se aplica/visitante): _____

Nombre de base militar (si se aplica): _____

Número telefónico (opcional): (_____) _____ - _____

Appendix C: Weighting

Weighting

For this project two weighting schemes were applied, both based on basic rider demographics (age, gender and ethnicity) and one including ridership by zone.

Weighting by age, gender and ethnicity was based on three different transportation modes within the MTS system for which recent demographic data were available. These modes were bus (local & express) and trolley. Within each mode the data was weighted by age, gender and ethnicity.

For overall analysis or subgroup differences such as demographics or mode of transportation, both demographic and zone ridership weighting was applied.

To allow for comparison between the riders of the four MTS zones, a sampling scheme was implemented to achieve at least 23% of completes for each zone. This ensured that valid conclusions based on statistically significant differences could be made. For all comparisons by zone, weighting by age, gender and ethnicity was applied.

The tables below show the target weighting values for the two weighting schemes used:

Weighting scheme 1

	Zone interviewed
South Bay	27%
East County	10%
Central Urban	61%
I-15 Corridor	2%

	MTS Bus	Rail	Premium Bus
Gender			
Male	51%	56%	48%
Female	49%	44%	53%

Ethnicity			
Hispanic	41%	48%	11%
Asian	9%	5%	24%
White	27%	31%	50%
African American	16%	11%	7%
Other	8%	6%	8%

Age			
12-18	15%	12%	1%
19-24	25%	21%	4%
25-34	19%	18%	13%
35-49	22%	25%	34%
50-59	12%	13%	33%
60+	8%	11%	16%

Weighting scheme 2

Zone interviewed: No weighting

	MTS Bus	Rail	Premium Bus
Gender			
Male	51%	56%	48%
Female	49%	44%	53%

Ethnicity			
Hispanic	41%	48%	11%
Asian	9%	5%	24%
White	27%	31%	50%
African American	16%	11%	7%
Other	8%	6%	8%

Age			
12-18	15%	12%	1%
19-24	25%	21%	4%
25-34	19%	18%	13%
35-49	22%	25%	34%
50-59	12%	13%	33%
60+	8%	11%	16%

Appendix D: Rider Quotes

This appendix contains a sampling of verbatim responses from riders to the question (Q19) “Please let me know if you have any other comments or suggestions about MTS service or projects.”

Rider Quotes:

Like MTS Service/Positive

- MTS is very clean, really good service (Female, Hispanic, 60+ years old, Regular Rider (3 or more times per week))
- Service is great! (Female, Asian, 19-24 years old, Regular Rider (3 or more times per week))
- More new trolleys is nice. Service is great! (Female, White (not Hispanic), 19-24 years old, Regular Rider (3 or more times per week))
- The MTS line is good the way it is. I don't think it should have any changes done to it. (Female, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- All drivers are nice. (Female, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- Very well done job, especially in the evening. Takes away a lot of worry. The no cans on bus rule cuts down on the smell. (Male, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- Thank you for finishing 5th Ave. Station. Keep up the good work! (Female, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- We are fortunate to have a nice system. (Female, Hispanic, 50-59 years old, Regular Rider (3 or more times per week))
- Service isn't perfect but it's not bad at all. (Male, Black/African American, 50-59 years old, Regular Rider (3 or more times per week))
- Thanks for being of great service! (Female, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- Very great service. Keep improving! (Male, Hispanic, 19-24, Regular Rider (3 or more times per week))
- Everything is fine. Service is great! (Female, White (not Hispanic), 13-18 years old, Regular Rider (3 or more times per week))
- Service is very good! The best system I've seen (Male, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- The MTS is the best. I'm a native and it's never failed me. It is totally sufficient. (Male, Black/African-American, 19-24 years old, Regular Rider (3 or more times per week))
- Great service overall! (Male, Asian, 24-34 years old, Regular Rider (3 or more times per week))
- Service is awesome! I like the Compass. (Female, White (not Hispanic), 13-18 years old, Visitor)
- There are good drivers on bus 810 and 848 routes. They call out all the stops. (Male, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- Drivers are very patient with disabled passengers. (Female, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- I think that San Diego transit is the best system in the Country. (Male, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))

Extended Service – Weekends

- I hate the fact that the Blue Line is always closed on weekends (Male, Multiple Ethnicities, 19-24 years old, Regular Rider (3 or more times per week))
- Run the trolley and buses later on weekends to prevent drinking and driving (Male, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- Have longer routes 709 running on Saturdays. People need to get to work. (Male, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- You need to have the 851 to run on weekends or at least Saturdays. (Male, Hispanic, 13-18 years old, Regular Rider (3 or more times per week))
- Weekends need more frequency of service. In the evening buses only run every hour. It is unfair for people who work weekends. (Male, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- Later service on routes 201 and 202 on weekdays and weekends would be ideal. (Female, Asian, 19-24 years old, Regular Rider (3 or more times per week))
- The 20 route needs more weekday and weekend evening service. (Male, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- The 845 and 20 service needs more times on the weekends. A 30 minute wait time would be good. (Female, Asian, Age Unknown, Regular Rider (3 or more times per week))
- Weekend service is horrible. A lot of routes don't run. People need to get to work. (Male, Ethnicity Unknown, 25-34 years old, Regular Rider (3 or more times per week))
- Weekend and holiday services are not adequate. (Male, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- Give us more buses on weekends. We need more service! (Male, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- More weekend service for the 855 route is necessary. (Female, Asian, 13-18 years old, Regular Rider (3 or more times per week))
- I wish buses and trolleys could run later and more frequent on the weekends. (Male, Hispanic, 13-18 years old, Regular Rider (3 or more times per week))
- More weekend routes for 955 and 1. (Male, Black/African American, 50-59 years old, Regular Rider (3 or more times per week))
- Get 856 on weekends running past 8:30. All lot of people get stranded. (Male, Hispanic (not White), 25-34 years old, Regular Rider (3 or more times per week))
- We don't ride much but we would appreciate some Sunday service. People have to get to church. (Female, Asian, 25-34 years old, Occasional Rider (1-10 times a month))
- Need more routes operating to and from North County on the weekends. (Male, Asian, 60+ years old, Regular Rider (3 or more times per week))
- We need more weekend routes. There are just as many people trying to get around on the weekend as they are on the week days. (Male, Hispanic, Age Unknown, Regular Rider (3 or more times per week))
- Some buses don't run that often on the weekends. For example, the #712 to South Western College. That needs to change. (Female, Black/African American, 19-24 years old, Regular Rider (3 or more times per week))

More Frequent Service

- You need to have more intervals of the 955 buses or more buses. (Male, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- You should have more buses running. (Female, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- Would like to have more 20x buses on the route. (Male, Black/African American, 50-59 years old, Regular Rider (3 or more times per week))
- The #2 Bus needs to be revised a bit more. Please add more during peak hours in the evening times. (Hispanic, Male, 35-49 years old, Regular Rider (3 or more times per week))
- Please add one more 810 route bus for the am and pm route. I would prefer 15 to 20 minutes intervals in the morning. (Female, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- Add more frequency to route 20 (Female, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- Add more services to 810 routes and open services in Borrego Springs. (Female, Asian, 35-49 years old, Regular Rider (3 or more times per week))
- An extra pm 810 bus would be nice. (Male, Hispanic, 35-49 years old, Regular Rider (3 or more times per week))
- The 810 bus is always very full. Many buses in afternoons are standing room only. You need to add buses to schedule. (Male, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- The 834 only runs four times a day by my house on the week days. This is a problem. (Female, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- The 202 bus can be very crowded during peak hours. We need more buses to run at these times. (Female, Asian, 19-24 years old, Regular Rider (3 or more times per week))
- Some routes in Rancho Bernardo need to run more frequently! (Female, Multiple Ethnicities, 35-49 years old, Regular Rider (3 or more times per week))
- I want the 880 to have more frequency of times. (Female, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- The trolleys are too crowded, they need more frequency. (Male, Hispanic, 35-49 years old, Regular Rider (3 or more times per week))
- They need to make more frequent stops in La Jolla colony area. A lot of seniors and disabled people are in this area. The lines don't run often enough and there is no bus stop in Doyle Park. (Female, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))

Extended Service – Early Morning/Late Night

- You guys need to continue running buses until 12 am (Female, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- I would like you to schedule trolley arrivals late night to coincide with buses at Iris. Scheduling is horrible! (Female, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- The buses & trolleys should have more after hours because I work late sometimes and I go out a lot (Female, Multiple Ethnicities, 19-24 years old, Regular Rider (3 or more times per week))
- I wish there were longer hours of service. (Male, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- Buses should run a lot later for those who work late. (Female, Hispanic, 25-34 years old, Regular Rider (3 or more times per week))
- I wish there was night time service for buses from Pacific Beach to La Jolla. After the bar closes please run at least one bus. (Male, White (not Hispanic), 19-24 years old, Occasional Rider (1-10 times a month))
- There needs more 844 and 845 bus service on nights and weekends. (Male, Asian, 50-59 years old, Regular Rider (3 or more times per week))
- I feel that the 834 bus needs to run longer during the week and needs weekends and holidays service too. (Male, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- You should have bus routes 960 run earlier and later. (Male, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- Bus 13 needs to run later during the whole week (Male, Multiple Ethnicities, 25-34 years old, Regular Rider (3 or more times per week))
- Bus 44 needs to run later in the week. (Male, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- Service in the weekdays could improve with the hours of operation. Most routes don't even run on weekends. (Female, Hispanic, 13-18 years old, Regular Rider (3 or more times per week))
- They can benefit from extending the hours of operations in the mornings and afternoons. (Female, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- The 810 should offer a trip from North County to downtown later, in the morning and downtown to North County earlier in the afternoon. It is impossible to arrive later or leave earlier with the current route times. (Female, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- Extra buses and trolleys should run at night until at least 2am and lower compass card price. Route 13 needs to run later! (Male, Hispanic, 25-34 years old, Regular Rider (3 or more times per week))
- Trains should run every night, all night; also the 7, 920, and 20 buses. All night have those buses running. (Male, Black/African American, 35-49 years old, Regular Rider (3 or more times per week))
- Trolleys should run earlier and stop a lot later for people that work (Male, Black/African American, 25-34 years old, Regular Rider (3 or more times per week))
- It would also be very nice to add one more late night #20 & #120 bus from Kearny Mesa to downtown. (Male, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))

More Security

- There should be more security inside trolleys (Female, Hispanic, 35-49 years old, Regular Rider (3 or more times per week))
- There should be more enforcement on the trolley at all times. There should always be at least one per car and more at busier trolley stations (Female, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- We need to have the cameras monitored by local police so they are aware of what is happening. (Male, Black/African American, 25-34 years old, Regular Rider (3 or more times per week))
- More security is necessary for east county stops. There is not enough. (Male, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- There needs to be more security on Friday and Saturday nights. (Male, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- I don't like to ride the trolley at night sometimes. It can be scary if there is no security around at the trolleys. (Female, Hispanic, Age Unknown, Regular Rider (3 or more times per week))
- There's crazy people at night on the trolleys. They should have more security. (Female, Hispanic, 31-49 years old, Infrequent Rider (Less than once a month))
- There needs to be more trolley police when bums are bugging me!!! (Female, Black/African American, 25-34 years old, Regular Rider (3 or more times per week))
- There needs to be more security at night when the crazy people come out!!! (Male, Black/African American, 19-24 years old, Regular Rider (3 or more times per week))
- Please beef-up security on the Orange line service. (Male, White (not Hispanic), 19-24 years old, Regular Rider (3 or more times per week))
- We need to have more security!! (Female, Hispanic, 19-24 years old, Occasional Rider (1-10 times a month))
- Please remove the graffiti and add more security (Male, Hispanic, 50-59 years old, Regular Rider (3 or more times per week))
- There needs to be more security at the bus stops. (Male, Black/African American, 25-34 years old, Regular Rider (3 or more times per week))

Ensure Buses Are On Time

- Route 11 is very long and is late a lot. (Female, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- Buses are not always on time. (Female, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- Buses never come on time! (Female, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- Trolleys are always late, especially on weekends. (Male, Black/African American, 35-49 years old, Regular Rider (3 or more times per week))
- Routes 815/816 are consistently late in all directions. (Female, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- Drivers need to be more sensitive to the time tables. I rely on MTS to get to work on time. (Male, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))

- I want more stable bus arrivals and departures. (Female, Black/African American, 25-34 years old, Regular Rider (3 or more times per week))
- The 880 bus should be on time. It never is. (Female, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- Trolley services are good but bus routes are late a lot and drivers are mean. (Female, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- Buses need to be on time every day not just on the weekends. (Male, Black/African American, 25-34 years old, Regular Rider (3 or more times per week))
- Please be more mindful. People have to be on time. (Female, Black/African American, 25-34 years old, Regular Rider (3 or more times per week))
- Bus #5 is always late after 4pm (Female, Hispanic, 50-59 years old, Occasional Rider (1-10 times a month))
- You need to work on bus promptness and schedule (Male, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- The 3 bus route is never on time. (Female, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- I've been late to work 4 times because of the bus drivers. (Male, Black/African American, 19-24 years old, Regular Rider (3 or more times per week))
- Bus is very slow. Sometimes it's late. (Female, Hispanic, 35-49 years old, Regular Rider (3 or more times per week))
- The buses are always late. There should be notification of late arrivals. (Female, Black/African American, Age Unknown, Regular Rider (3 or more times per week))
- The 880 is always late because of traffic or because of breakdowns. (Female, Hispanic, 35-49 years old, Regular Rider (3 or more times per week))

Rude/Unfriendly Operators

- Some drivers roll past you, even when you're at the bus stop. They need to stop! (Male, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- You have to work on bus driver attitudes. They need to have more compassion for women with strollers. (Female, Hispanic, 35-49 years old, Regular Rider (3 or more times per week))
- Drivers are mean sometimes! (Male, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- Why do all these bus drivers have attitudes! (Female, Black/African American, 19-24 years old, Occasional Rider (1-10 times a month))
- The #7 drivers are rude sometimes (Female, Black/African American, 35-49 years old, Regular Rider (3 or more times per week))
- Bus driver wouldn't let me in before departing and was really rude about it. (Male, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- Trolley operator wouldn't open the door when my foot was stuck on it. I yelled and he continued to go until it came out by itself. (Female, Hispanic, 60+ years old, Regular Rider (3 or more times per week))
- Drivers don't treat everyone equally and with respect. (Male, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))

- Bus drivers are usually very rude about my questions. (Male, Asian, 35-49 years old, Regular Rider (3 or more times per week))
- Majority of buses drivers are not courteous, I would recommend customer care/relations for all drivers. Some drivers roll past you, even when you're at the bus stop. They need to stop! (Male, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- Some bus drivers are rude. They see you by the stop sign and they don't stop. (Female, Hispanic, 35-49 years old, Regular Rider (3 or more times per week))
- The 833 bus driver leaves customers at bus stops, on the weekdays. No warning, she just takes off. She is very rude to seniors & the youth. (Male, Black/African American, 19-24 years old, Regular Rider (3 or more times per week))
- The bus driver on 709 was being very rude to a young boy and left behind another girl. Some drivers roll past you, even when you're at the bus stop. They need to stop! (Male, White (not Hispanic), 25-34 years old, Regular Rider (3 or more times per week))
- The 929 buses are terrible. The drivers don't wait till you sit down before driving off. (Female, Asian, 60+ years old, Regular Rider (3 or more times per week))
- The driver made me walk back to Albertsons to verify my compass card. (Female, Asian, 35-49 years old, Regular Rider (3 or more times per week))
- Get nicer drivers especially on bus #932 and nicer trolley securities as well. (Male, Black/African American, 19-24 years old, Regular Rider (3 or more times per week))
- The #929 drivers are mean sometimes!! (Male, Black/African American, 19-24 years old, Regular Rider (3 or more times per week))
- Bus drivers should be courteous enough to stop if they see people coming towards the bus stop. (Female, Hispanic, 25-34 years old, Regular Rider (3 or more times per week))
- Some bus drivers on #929 in the morning are mean. (Male, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))

More Rapid Transit Routes

- There needs to be more express buses out there. (Male, Black/African American, 35-49 years old, Regular Rider (3 or more times per week))
- A mid-city trolley would be great. I wish there were tighter connections for the 845, 880, and 810 bus routes. (Male, Asian, 25-34 years old, Regular Rider (3 or more times per week))
- Some of the connections could be more efficient. (Male, White (not Hispanic), Age Unknown, Regular Rider (3 or more times per week))
- An express bus to Mission Valley from Rancho Bernardo would be nice. (Male, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- An express bus up to the veteran's hospital would be a great idea (Male, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))
- You need to make routes faster! (Male, Hispanic, 19-24 years old, Regular Rider (3 or more times per week))

Bus/Trolley Stops Should Be Cleaner

- Some bus stations are dirty. (Female, Hispanic, 25-34 years old, Regular Rider (3 or more times per week))
- Clean up the stations and put out more trash bins, etc. (Female, Hispanic, 25-34 years old, Regular Rider (3 or more times per week))
- Make sure trolleys are clean because stations are dirty. (Male, Hispanic, 50-59 years old, Regular Rider (3 or more times per week))
- Make sure there are no homeless people running around the stops. Cleanliness is important so you should have cleanup crews at the stops. (Male, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- You need to have cleaner stations! (Female, Black/African American, 25-34 years old, Regular Rider (3 or more times per week))
- Some bus stops are clean, others are not. (Female, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
- Blue line trolleys and their stations are dirty. (Male, Hispanic, 25-34 years old, Regular Rider (3 or more times per week))

More Bus Routes

- Overall, I wish transit afforded for more inter-county connections and shared transfer connections to other counties (Female, White (not Hispanic), Age Unknown, Occasional Rider (1-10 times a month))
- Mission Gorge needs more routes. I have to walk too far to a route. (Female, Asian, 25-34, Regular Rider (3 or more times per week))
- You should put in more mid-city routes. (Female, White (not Hispanic), 19-24 years old, Regular Rider (3 or more times per week))
- There needs to be more routes running between University & Del Mar (Male, White (not Hispanic), 60+ years old, Regular Rider (3 or more times per week))
- There should be more routes in the Santee area. (Female, White (not Hispanic), 35-49 years old, Regular Rider (3 or more times per week))
- Please create routes that go to Carlsbad (Female, Asian, 35-49, Regular Rider (3 or more times per week))
- They should have more routes in San Ysidro in the west side. (Female, Hispanic, 25-34 years old, Regular Rider (3 or more times per week))
- It would be extremely nice to have more service along I-15. (Male, White (not Hispanic), 50-59 years old, Regular Rider (3 or more times per week))
You need more routes going from North County into UTC and Downtown (Female, White (not Hispanic), 19-24 years old, Regular Rider (3 or more times per week))



San Diego Metropolitan Transit System


2013 Passenger Satisfaction Survey



2

Objectives

- Three-part satisfaction measurement (2011, 2013, 2014/15)
- Compare current satisfaction (2013) to benchmark satisfaction scores (2011)
- Evaluation of rider response to MTS upgrades and changes



3

Methodology



- Approximately 15 minute survey
- Onboard trolleys and buses
- Bilingual: English and Spanish



- Survey administration from March 18th and April 29th, 2013



- 1,386 riders
- No MTS employees
- 13 years or older

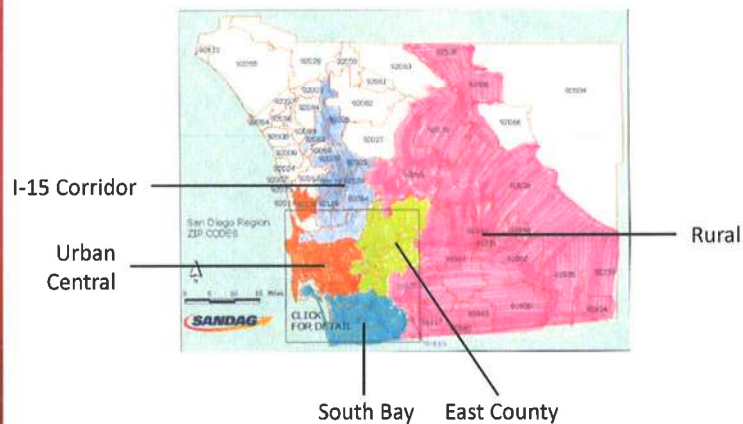
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Interviewing

Interviewing in four (4) zones

Zone	Number of Surveys Conducted	
South Bay	337	23%
East County	313	23%
Central Urban	465	32%
I-15 Corridor	271	23%



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Respondent Profile

Zone Interviewed		
	2011	2013
South Bay	27%	26%
East County	10%	10%
Central Urban	61%	60%
I-15 Corridor	2%	4%

Gender		
	2011	2013
Male	53%	53%
Female	47%	47%

Ethnicity		
	2011	2013
Hispanic	42%	41%
White	29%	29%
African American	14%	13%
Asian	9%	8%
Other	8%	9%

Age		
	2011	2013
13-18	13%	13%
19-24	23%	22%
25-34	19%	18%
35-49	23%	24%
50-59	13%	14%
60+	9%	10%

Household Income		
	2011	2013
Less than \$15,000	35%	36%
\$15,000 to \$29,999	32%	29%
\$30,000 to \$39,999	10%	10%
\$40,000 to \$49,999	7%	8%
\$50,000 to \$74,999	5%	6%
\$75,000 to \$99,999	7%	3%
\$100,000 or more	4%	7%

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*Weighted Data Scheme 1

**Percentages may not add up as expected due to rounding

5

6

MTS Satisfaction

- Overall satisfaction with MTS
- Overall MTS service feedback
- Additional comments or suggestions

*"I think that San Diego transit
is the best system
in the country."*

(Male, White (not Hispanic), 60+ years old,
Regular Rider)

*"The MTS is the best. I'm a
native and it's never failed me.
It is totally sufficient."*

(Male, Black/African-American,
19-24 years old, Regular Rider)

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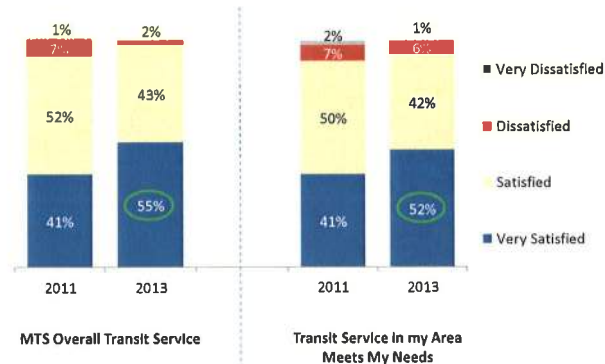
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Overall Satisfaction with MTS

Riders were significantly more likely to be very satisfied with MTS overall in 2013 compared to 2011.

- Improvements were shown across all zones except the South Bay.
- Satisfaction improved considerably for riders on Local/Express bus routes and the Green Line trolley.


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* Percentages may not add up as expected due to rounding

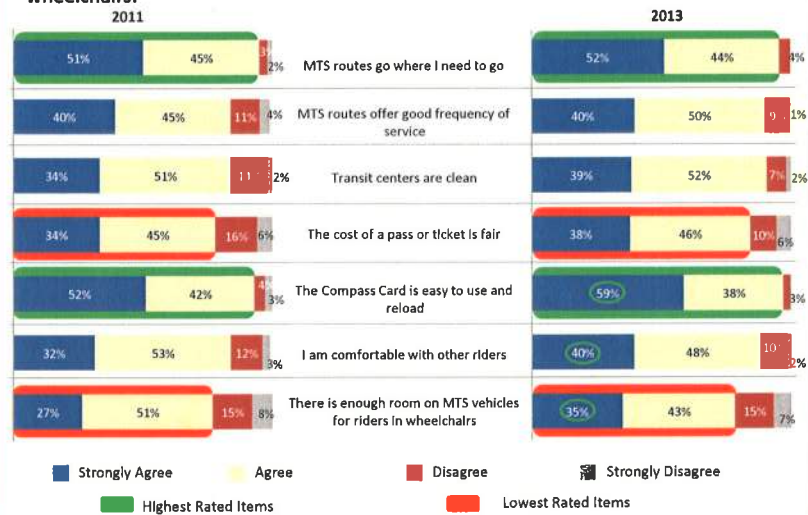
○/○ Significantly higher/lower than 2011 at 95% confidence interval

Q15. Please indicate your level of satisfaction with the following areas of service.

8

Overall MTS Service Feedback

Riders were more likely to strongly agree with three out of seven service-related statements in 2013. Opportunity to improve perceptions of cost and accommodation of wheelchairs.


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* Percentages may not add up as expected due to rounding

○/○ Significantly higher/lower than 2011 at 95% confidence interval

Q10. Please let me know how much you agree or disagree with the following statements.

9

Respondent Comments/Suggestions

Approximately one in three riders (37%) wrote in comments or suggestions at the end of the survey (down from 45% in 2011), the majority of which centered on extending and increasing service.

4% of riders gave positive comments indicating they like MTS service, significantly down from 2011.

Q19. Please let me know if you have any other comments or suggestions about MTS service or projects.*		
	2011	2013
Gave Comments (Any)	45%	37%
Positive Comments		
Like MTS service/positive (General)	8%	4%
Negative Comments		
Extended service – Weekends	6%	7%
More frequent service	4%	4%
Extended service - Early morning/Late night	5%	3%
More security	3%	3%
Ensure buses are on time	3%	3%
Rude/Unfriendly operators	3%	2%
More rapid transit routes	0%	2%
Bus/Trolley stops should be cleaner	1%	2%
More bus routes	0%	2%

  Significantly higher/lower than 2011 at 95% confidence interval

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10

Satisfaction with Bus and Trolley Services

- Overall satisfaction with MTS Bus services
- Overall satisfaction with MTS Trolley services
- MTS Bus and Trolley feedback by subgroup

"Bikes should have their own space; children & seniors get hurt. They should also hire people to clean the stations."

(Female, Black/African American,
35-49 years old, Occasional Rider)

"You need more space for passengers & to get there on time, not early or late."

(Male, Hispanic,
19-24 years old, Regular Rider)

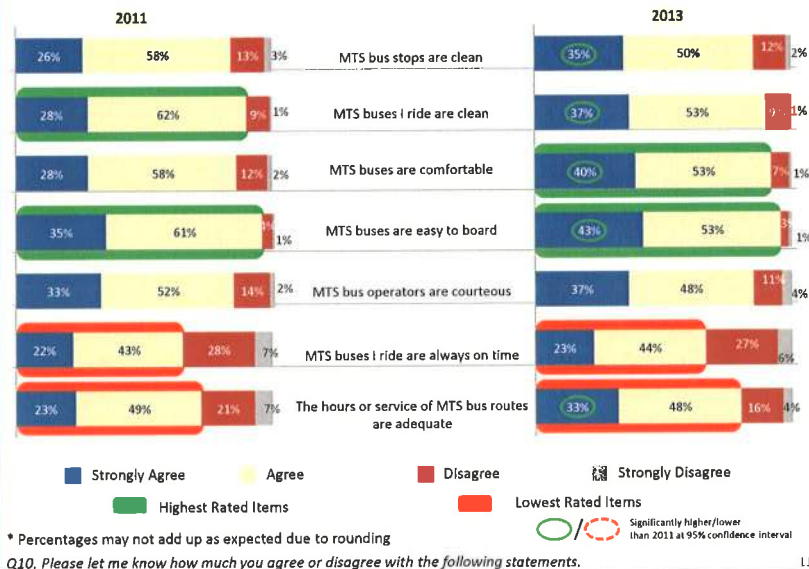
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11

Bus Service Feedback

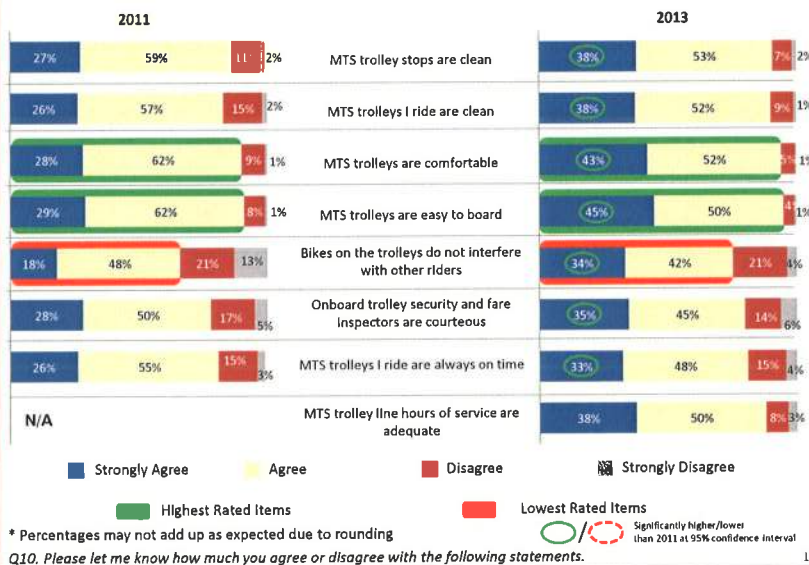
While perceptions of MTS Bus service improved for nearly every attribute in 2013 compared to 2011, the timeliness of buses remained a concern.



12

Trolley Service Feedback

Attitudes toward MTS Trolley service also showed considerable improvement in 2013, particularly in the Central Urban zone. Concerns remained about bikes on the trolley.



13

Bus and Trolley Service Feedback by Subgroup

Sub-groups with significantly lower ratings:



	Bus	Trolley
Clean Stops/Stations	<ul style="list-style-type: none"> East County Local/Express <\$15K 	<ul style="list-style-type: none"> Orange Line Ages 13-18, 19-24
Cleanliness of Vehicles	<ul style="list-style-type: none"> East County Local/Express Ages 13-18, 25-34 	<ul style="list-style-type: none"> Ages 19-24
Comfortable	<ul style="list-style-type: none"> <\$15K, \$15-\$24K 	<ul style="list-style-type: none"> I-15 Corridor Orange Line Ages 13-18 <\$15K
Courteousness of Personnel	<ul style="list-style-type: none"> East County Local/Express Ages 13-18, 25-34 <\$15K, \$15-\$24K, \$25-\$49K 	<ul style="list-style-type: none"> Ages 13-18
Always on Time	<ul style="list-style-type: none"> East County Local/Express <\$15K, \$15-\$24K, \$25-\$49K 	<ul style="list-style-type: none"> Ages 13-18 <\$15K, \$50K+

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Q10. Please let me know how much you agree or disagree with the following statements.

13

14

Customer Service & Transit Information Tools

- Satisfaction with customer service
- Use of transit information tools
- Helpfulness of transit information tools

*"Would like to know about
mobile real-time bus
times; would be great!"*

(Female, White (not Hispanic), Age
Unknown, Regular Rider)

*"Website was a little bit
confusing in the beginning
but I like it now."*

(Male, White (not Hispanic), Age
Unknown, Regular Rider)

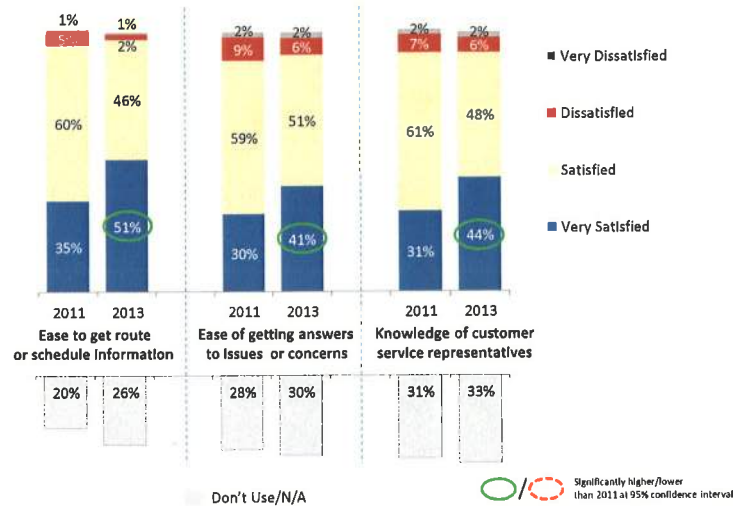
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15

Satisfaction with Customer Service

Satisfaction with customer service showed significant improvement between 2011 and 2013, with riders now significantly more likely to be very satisfied with all aspects tested.

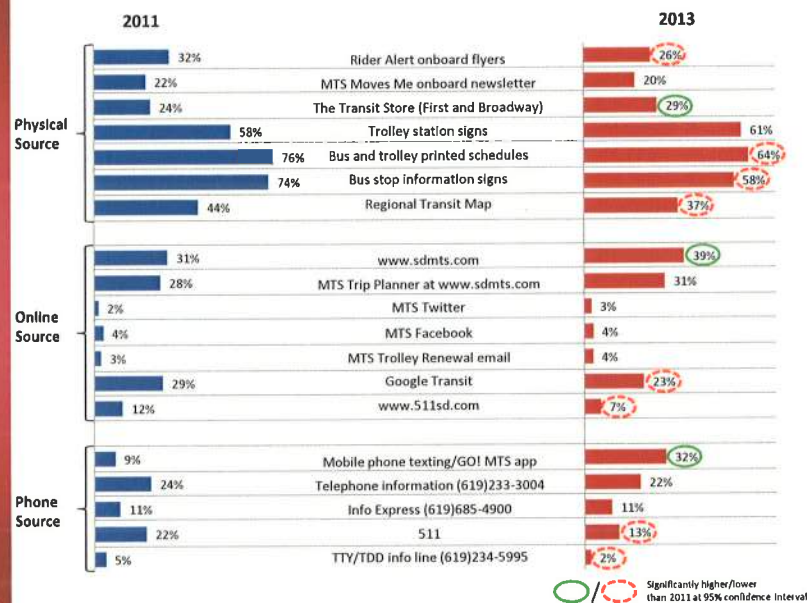

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Q12. Please let me know how satisfied or dissatisfied you are with the following aspects of MTS customer service.

15

16

Use of Transit Information Tools

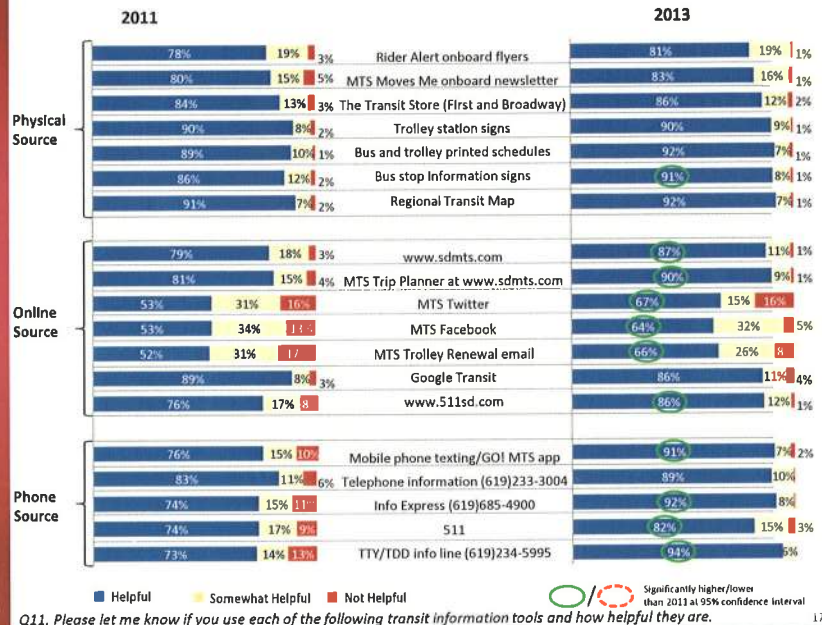

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Q11. Please let me know if you use each of the following transit information tools and how helpful they are.

16

17

Helpfulness of Transit Information Tools



18

Projects & Initiatives

- Satisfaction with initiatives implemented
- Importance of projects not yet implemented

"We need up-to-date signs of the status of the trolley at the trolley stops."

(Male, Black/African American, Age Unknown, Regular Rider)

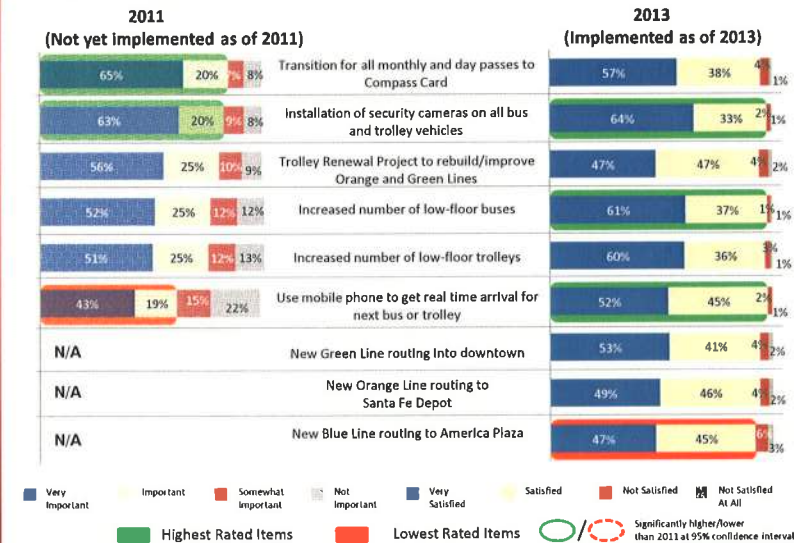
"The Blue Line to San Ysidro has very limited space; needs more room, especially for high transit hours and days."

(Male, Hispanic, 35-49 years old, Regular Rider)

19

Projects & Initiatives – Implemented

At least 90% of riders were satisfied with all of MTS' projects and initiatives that were implemented as of 2013.

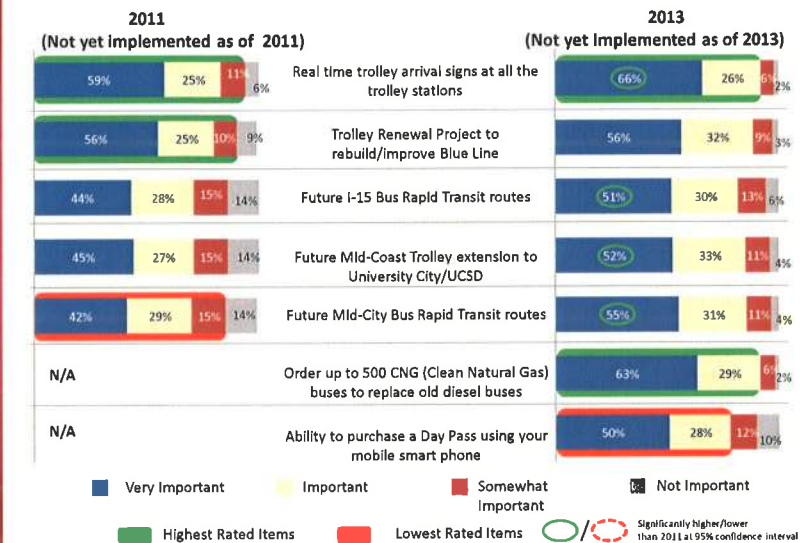


Q13. MTS is working on a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how important each of the following initiatives is to you.

20

Projects & Initiatives – To Be Implemented

Riders generally found the initiatives proposed in 2011 that were not completed by 2013 more important in 2013.



Q13. MTS is working on a variety of projects to improve the bus and trolley system and the passenger experience and ease of use. Please let me know how important each of the following initiatives is to you.

21

Reasons for Taking Public Transit

- Top 3 reasons cited for taking public transit

"Bus routes are environmentally friendly and I am able to save much more money by not spending it on gas."

(Male, White (not Hispanic), 50-59 years old, Regular Rider)

"Very well done. MTS takes away the worry of finding a ride."

(Male, White (not Hispanic), 50-59 years old, Regular Rider)

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Reasons for Taking Public Transit

The top 3 reasons for taking public Transit in 2013 were *save money, no car to use, and price of fuel*.

Riders were less likely to include *better for environment* in their top 3 reasons in 2013 than they had been in 2011.

Top 3 Reasons For Taking Public Transit	
2011*	2013**
Save Money (94%)	Save Money (73%)
Better for Environment (91%)	No Car to Use (66%)
Price of Fuel (86%)	Price of Fuel (38%)

*Note: Respondents were asked in 2011 to judge the importance of each tested reason using an Importance scale; scores shown are the sum of *very important* and *somewhat important*.

**Note: Respondents were asked in 2013 to judge the importance of each tested reason by selecting their top three most Important reasons.

LUTH
research

Q14. How important is each of the following in your decision to ride public transit?

22

23	Implications
1. Timeliness of service	---> Keep to schedule; increase frequency
2. Cleanliness of stops/vehicles	---> Current procedures; involve riders
3. Courteousness of personnel	---> Consistency across all age groups
4. Technology	---> Continue supporting online/mobile
5. Projects & initiatives	---> Complete I-15 BRT routes



1255 Imperial Avenue, Suite 1000
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Agenda Item No. 46

MEETING OF THE METROPOLITAN TRANSIT SYSTEM BOARD OF DIRECTORS

July 18, 2013

SUBJECT:

STUDENT PASS PILOT PROGRAM (SHARON COONEY)

RECOMMENDATION:

That the Board of Directors receive an update on the proposed pilot program to supply free or reduced fare transit passes to students in San Diego Unified School District.

Budget Impact

None.

DISCUSSION:

MTS was approached in November 2012 to participate in a program for giving free or discounted bus passes to students. Representatives from the City of San Diego and the San Diego Unified School District asked the Budget Development Committee to consider a pilot to determine if providing free passes to students would diminish absenteeism. Both the School District and the City included funding in the Fiscal Year 2014 budget to subsidize a pilot at four high schools: San Diego, Crawford, Hoover and Lincoln. Staff will provide an update on implementation of the program.



Paul C. Jablonski
Chief Executive Officer

Key Staff Contact: Sharon Cooney, 619.557.4513, Sharon.Cooney@sdmts.com





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Agenda

Item No. 62

Chief Executive Officer's Report

ADM 121.7

July 18, 2013

In accordance with Board Policy No. 52, Procurement of Goods and Services, attached are listings of contracts, purchase orders, and work orders that have been approved within the CEO's authority (up to and including \$100,000) for the period June 18, 2013, through July 15, 2013.



EXPENSE CONTRACTS

Doc #	Organization	Subject	Amount	Day
B0570.1-12	NEW FLYER	ADMIN CHANGES	\$2,130.80	7/1/2013
L1111.1-13	CUBIC TRANSPORTATION SYSTEM	AMEND FOR TAX ADJUSTMENT	\$1,059.00	7/1/2013
L1016.2-11	KLD LABS	WHEEL SCANNING MACHINE	\$22,373.00	7/2/2013
PWL146.0-13	TRI-SIGNAL INTEGRATION	FIRE ALARM TESTING AND MAINTENANCE	\$24,370.00	7/3/2013
G1546.0-13	ROSS & BARUZZINI	CONSULTING SERVICES	\$75,000.00	7/8/2013
G1193.3-08	COZEN O'CONNOR ATTORNEYS	INCREASE FOR LEGAL SERVICES	\$20,000.00	7/11/2013

REVENUE CONTRACTS

Doc #	Organization	Subject	Amount	Day
S200-13-542	HENKELS & MCCOY INC	ROE PERMIT	(\$3,200.00)	6/19/2013
G0078.5-91	CITY OF POWAY	REGULATE FOR-HIRE VEHICLES	\$0.00	6/21/2013
G0501.3-99	CITY OF LA MESA	REGULATE FOR-HIRE VEHICLES	\$0.00	6/21/2013
M6705.0-13	CITY OF SAN DIEGO	ROE FOR PARKS AND REC	\$0.00	6/21/2013
G1549.0-13	RESERVATION TRANSPORTATION AUT	BUS STOP REHABILITATION	(\$62,000.00)	6/24/2013
L1154.0-13	ACCESSIBLE SAN DIEGO	ROE PERMIT	\$0.00	6/27/2013
L4620.0-13	SDG&E	PLACEMENT AND MAINTENANCE OF FAKE IVY	\$0.00	7/2/2013
T0047.5-90	CITY OF SANTEE	REGULATE FOR-HIRE VEHICLES	\$0.00	7/2/2013
S20013539.1	SDGE	ROE PERMIT TIME EXTENSION	\$0.00	7/5/2013
G1523.0-13	AMTRAK	TRAIN DAY EXHIBITOR AGREEMENT	\$0.00	7/6/2013
L5751.0-13	HMS CONSTRUCTION INC	JROE	\$0.00	7/6/2013
G1524.0-13	SPRINT PCS ASSETS, LLC	CUP TERMS AND CONDITIONS AGREEMENT	\$0.00	7/8/2013
B0508.5-09	UCSD	ZONE PASS AGMT FY14	(\$2,807,198.00)	7/10/2013
L7051.0-13	MCCARTHY BUILDING COMPANIES	ROE PERMIT	\$0.00	7/10/2013
T0048.5-90	CITY OF IMPERIAL BEACH	REGULATE FOR-HIRE VEHICLES	\$0.00	7/10/2013
G1539.0-13	DOWNTOWN SAN DIEGO PARTNERSHIP	ECO PASS	(\$405,522.00)	7/11/2013
G1627.0-13	CITY OF CORONADO	FARE-FREE SHUTTLE BUS PROJECT	(\$49,762.95)	7/11/2013
L4621.0-13	NBC UNIVERSAL MEDIA	ROE PERMIT FOR COMIC CON	(\$85,000.00)	7/12/2013

PURCHASE ORDERS

DATE	PO NUMBER	Organization	Subject	AMOUNT
6/18/2013	3445	ORACLE CORP	ORACLE DATABASE	\$4,661.95
6/19/2013	3448	L&L PRINTERS	TROLLEY AND BUS BANKS	\$2,930.04
6/19/2013	3449	ANDERSON & BRABANT	APPRAISAL FOR FAIRMONT AVE	\$2,750.00
6/21/2013	3446	THE DATA GROUP OF COMPANIES	MTS QUALCOMM BROCHURE	\$3,969.00
6/21/2013	3450	URBAN CORPS OF SAN DIEGO	CACTUS PARK CLEAN UP	\$5,290.00
6/27/2013	3454	SOLARWINDS INC	UPGRADES SAM LICENSE	\$2,999.00
6/27/2013	3455	CDW GOVERNMENT INC	HP CLJ ENTERPRISE 500	\$1,574.06
6/27/2013	3457	DISPLAYS2GO	COMMERCIAL TV	\$869.19
7/1/2013	3452	SHI INTERNATIONAL CORP	SAP BUSINESS OBJECTS 1ST YR MAINT.	\$53,559.78
7/1/2013	3453	SCREENVISION	60 ON SCREEN CINEMA ADS	\$6,918.00
7/1/2013	3456	DELL COMPUTER CORP	DELL LATITUDE E 6430	\$18,512.27
7/1/2013	3458	CALHOUN TECHONOLOGIES	10 GBASE-SR	\$4,720.00
7/1/2013	3459	CDW GOVERNMENT INC	CISCO SMART NET EXTENDED SERVICES	\$4,779.50
7/1/2013	3460	CDW GOVERNMENT INC	SYMANTEC PROTECTION	\$3,050.00
7/1/2013	PW001088	PREMIER ROOFING CA INC	MTS QUALCOMM CONTROL STATION	\$6,526.00
7/3/2013	3461	HERSHEY TECHNOLOGIES	ELECTRONIC DOCUMENT EMAIL INTEGRATI	\$9,600.00
7/3/2013	3462	CDW GOVERNMENT INC	EDGE MEMORY 6 GB 2X4	\$809.19
7/5/2013	3463	SALVADOR BARAJAS	ON CALL TRANSLATION SERVICES	\$2,992.00
7/5/2013	3464	REPUBLIC MOVING & STORAGE	3 PHASE MOVE FOR REMODEL	\$7,020.00
7/8/2013	3387	THE WELCH COMPANY INC	FURNITURE FOR 9TH FLOOR	\$20,906.54
7/9/2013	3465	THE WELCH COMPANY	NEW RECEPTION DESK 10TH FLOOR	\$9,799.00
7/9/2013	PW001089	COMMUNICATION WIRING SPECIALIS	600 HRS CABLING SERVICES	\$39,983.25
7/15/2013	3467	KERNAN CONSULTING	SPLUNK JUMPSTART PROGRAM	\$895.00

WORK ORDERS

Doc #	Organization	Subject	Amount	Day
G1386.0-11.01.01	PGH WONG ENGINEERING	AMENDMENT 1	\$50,000.00	7/8/2013
G1386.0-11.02.01	PGH WONG ENGINEERING	AMENDMENT 1	\$75,000.00	7/8/2013
G1386.0-11.04.01	PGH WONG ENGINEERING	AMENDMENT 1	\$50,000.00	7/8/2013



AGENDA ITEM NO.

64

REQUEST TO SPEAK FORM

ORDER REQUEST RECEIVED

1

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 must be filled out and submitted in advance of the discussion of your item to the Clerk of the Board (please attach any written statement to this form). Communications on hearings and agenda items are generally limited to three 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 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.

(PLEASE PRINT)

DATE	7-18-13
Name	DOROTHY LAZENBY (Dorothy Lazenby)
Address	138 Third Ave #404 SD 92101
Telephone	6199069361
Organization Represented	
Subject of Your Remarks	MTS PROPLANS
Regarding Agenda Item No.	
Your Comments Present a Position of:	<input type="checkbox"/> SUPPORT <input type="checkbox"/> 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 speakers with three minutes each, under the Public Comment Agenda Item. Additional speakers will be heard at the end of the Board's Agenda.

NOTE: Subjects of previous hearings or agenda items may not again be addressed under General Public Comments.



AGENDA ITEM NO.

64

REQUEST TO SPEAK FORM

ORDER REQUEST RECEIVED

2

PLEASE SUBMIT THIS COMPLETED FORM (AND YOUR WRITTEN STATEMENT)
TO THE CLERK OF THE BOARD PRIOR TO DISCUSSION OF YOUR ITEM

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(PLEASE PRINT)

DATE	7-19-13		
Name	Lorraine M. Leighton		
Address	745 E. Bradley Ave #96 E. M. 20021		
Telephone			
Organization Represented	DISABLED Public		
Subject of Your Remarks	RT. 833 + proper procedure		
Regarding Agenda Item No.	Public Speaking		
Your Comments Present a Position of:	<input type="checkbox"/>	<input checked="" type="checkbox"/> SUPPORT	<input type="checkbox"/> OPPOSITION

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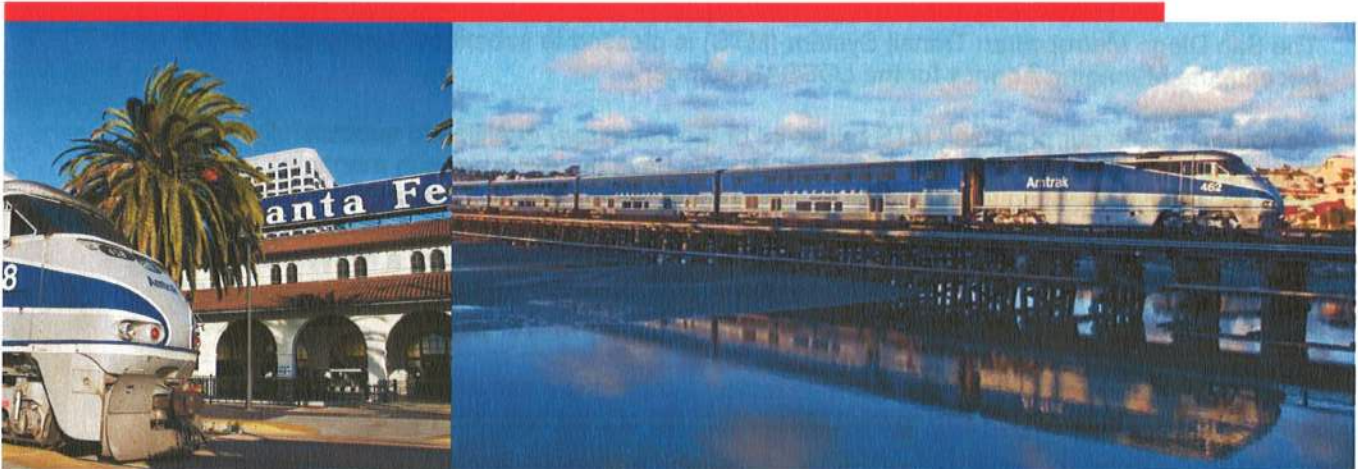
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PROPOSAL



**Managing Agency to Oversee State-Supported
Intercity Passenger Rail Service in the
Los Angeles – San Diego – San Luis Obispo
(LOSSAN) Rail Corridor**



Name: San Diego Metropolitan Transit System
Address: 1255 Imperial Avenue
San Diego, CA 92101
Contact Person: Sharon Cooney
Chief of Staff
(619) 557-4513
sharon.cooney@sdmts.com

June 14, 2013



Metropolitan Transit System

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

June 14, 2013

The Honorable Fred Strong
Chair of the LOSSAN Joint Powers Authority Board of Directors
401 B Street, Suite 800
San Diego, CA 92101

Dear Chair Strong:

The San Diego Metropolitan Transit System (MTS) is pleased to submit our application to become the Managing Agency for the LOSSAN corridor.

As you will see in our proposal, MTS brings all of the necessary qualities to successfully manage the corridor. We are free from conflicts. We have the experience in managing rail services and coordinating with multiple agencies for rail operations and capital improvements. We have potential storage capacity at the southern terminus of the corridor. MTS is highly regarded nationally for its cost-efficient service. Most importantly, we have a highly motivated staff, the organizational structure and the facilities to immediately begin work as the Managing Agency.

Thank you in advance for taking the time to review our proposal and we look forward to presenting the strengths of MTS to the LOSSAN Board of Directors on Wednesday, June 19.

Sincerely,

Paul Jablonski
Chief Executive Officer

LMARQUIS-L
L-HONFSTRONG.LOSSAN.JPABD.BBOYD.061313

1255 Imperial Avenue, Suite 1000, San Diego, CA 92101-7490 • (619) 231-1466 • www.sdmts.com



Metropolitan Transit System (MTS) is a California public agency comprised of San Diego Transit Corp., San Diego Trolley, Inc., San Diego and Arizona Eastern Railway Company (nonprofit public benefit corporations), and San Diego Vintage Trolley, Inc., a 501(c)(3) nonprofit corporation, in cooperation with Chula Vista Transit. MTS is the taxicab administrator for seven cities. MTS member agencies include the cities of Chula Vista, Coronado, El Cajon, Imperial Beach, La Mesa, Lamon Grove, National City, Poway, San Diego, Santee, and the County of San Diego.



INTRODUCTION

The San Diego Metropolitan Transit System (MTS) is pleased to submit its application to become the managing agency for the LOSSAN corridor and Amtrak's Pacific Surfliner service.

With 2.7 million passengers annually riding the Pacific Surfliner, and another 4.5 million passengers riding its commuter lines, the LOSSAN rail corridor is an extremely important transportation link for all of Southern California. With track owned by seven different entities and connecting service provided by an array of different transit operators, it is essential that the planning and administration of this valuable corridor be managed expertly.

MTS is committed to improving, expanding, and fostering the growth of intercity rail service in Southern California in a manner that is equally beneficial to all corridor member agencies.

MTS possesses the following advantages for being selected as the managing agency:

- Proven effective and efficient operation and management of a functioning railroad.
- Long history of right-of-way ownership and maintenance.
- Recognized commitment to provide high quality services and increase ridership.
- Healthy long-standing relationships with corridor agencies, including the California Public Utilities Commission (CPUC), Federal Railroad Administration (FRA), and passenger and freight railroad companies.
- The lead negotiator of the Interagency Transfer Agreement (ITA) will be MTS's CEO, who has experience with negotiations on a wide variety of transportation issues and who will be supported by a very experienced team of transit and rail experts.
- Lack of a conflict of interest: MTS does not operate or fund heavy passenger rail. Consequently, MTS will maintain a fair and balanced perspective of the corridor.

This introduction will describe the following: 1) summary of MTS services, 2) MTS's proven efficiency of service operation, 3) MTS's rail operation and management experience, 4) MTS's relationships with other corridor agencies, and 5) MTS's understanding regarding the role of the managing agency. The conclusion is that MTS is best positioned to help achieve the operational goals of the LOSSAN corridor.

Summary of MTS Services

MTS is the public transportation provider for the southern and central portions of San Diego County and is situated at the southern terminus of the LOSSAN corridor. MTS serves 10 cities and a population in excess of two million, and is governed by a 15-member board of elected officials. MTS currently manages an operating budget of \$249 million and carried over 88 million passengers in FY12. Its transportation network includes the following:

- **Light Rail (Trolley):** Operates three lines on 102 miles of track; over 30 million passengers per year.
- **Bus:** Operates 93 bus routes; over 55 million passengers per year.
- **Freight Rail:** Owns 108 miles of freight track and contracts with San Diego & Imperial Valley (SD&IV) Railroad and Pacific Imperial Railroad, Inc. (PIR) to provide service on portions of the line.
- **Paratransit:** Provides door-to-door access service for passengers within 3/4-mile of a bus route or Trolley station.
- **Taxi:** Licenses and regulates taxicabs, jitneys, and other private for-hire passenger transportation services for seven cities in the region (including San Diego).

MTS is well-known throughout the industry for its efficient service management and was named the American Public Transportation Association's (APTA) Outstanding Public Transit System in 2009 for its high ridership, low costs, customer satisfaction, and exceptional safety record.

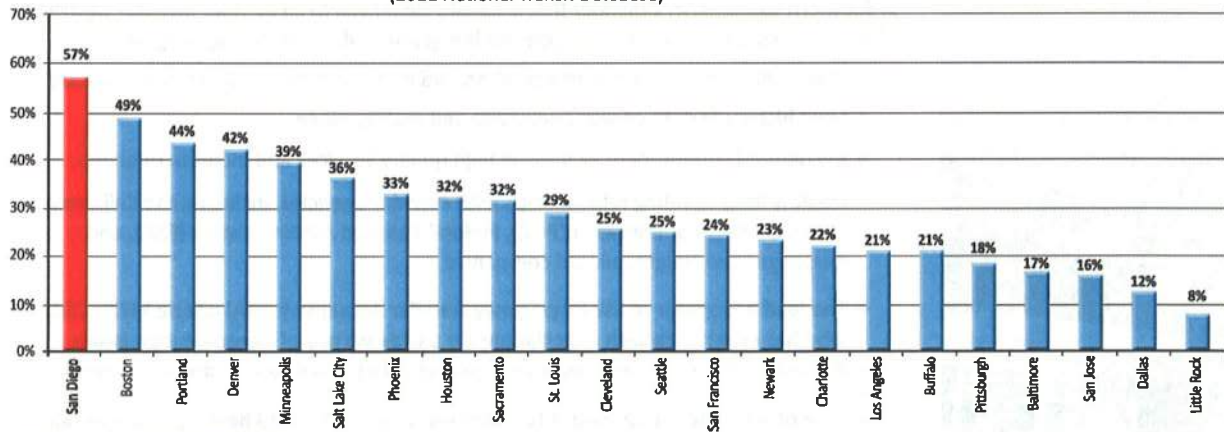


MTS's Proven Efficiency of Service Operation

MTS is one of the most efficient transit operators in the nation. According to the 2011 release of the National Transit Database (NTD), MTS's farebox recovery rate was 42%, compared to the national average of 33% and a 36% average for the 50 largest agencies nationwide. No agencies in California with both bus and rail operations had higher farebox recovery rates. In terms of light rail transit (LRT) operation, MTS had the highest farebox recovery rate in the country, at 57%, and was the only LRT operation in the nation to recover more than half of its operating costs with fare revenues (see Figure 1).

Figure 1

Farebox Recovery Rate of LRT systems (2011 National Transit Database)



MTS's high farebox recovery rate is due to its ability to efficiently manage its services and keep costs to a minimum. MTS operated its three lines with an average operating cost of \$142.85 per revenue hour and \$8.03 per revenue mile, compared to figures nationally of \$248 per hour and \$16 per mile. Accordingly, its \$1.91 cost per passenger and \$0.81 subsidy per passenger figures are substantially lower than the nationwide figures and all other California agencies that operate LRT (see Figures 2-4).

Figure 2

Cost per Revenue Hour of LRT Systems (2011 National Transit Database)



Figure 3

Cost per Passenger of LRT systems (2011 National Transit Database)





Figure 4
Subsidy per Passenger of LRT systems
(2011 National Transit Database)



Consistent with the above analysis, a year earlier (2010), San Diego Association of Governments' (SANDAG) TransNet Independent Taxpayers Oversight Committee (ITOC) found MTS to be the most efficiently operated transit agency among nine peer systems in the nation. The comparisons, which included farebox recovery rate, operating cost per boarding, subsidy per boarding, and operating cost per revenue mile, were made for both LRT and fixed-route bus operations. The ITOC found that MTS's system-wide performance surpassed the peer average in all categories. Table 1 summarizes its findings.

Table 1
Trolley and Bus Operating Performance
(TransNet Independent Taxpayers Oversight Committee Findings 2010)

	Farebox Recovery Rate		Operating Cost per Boarding		Subsidy per Boarding		Operating Cost per Revenue Mile	
	Rail	Bus	Rail	Bus	Rail	Bus	Rail	Bus
MTS	54.3%	38.1%	\$2.00	\$2.66	\$0.91	\$1.65	\$7.87	\$7.62
Los Angeles	18.3%	26.5%	\$3.62	\$2.58	\$2.96	\$1.90	\$17.41	\$10.86
Dallas	12.6%	11.5%	\$6.29	\$6.52	\$5.50	\$5.77	\$22.66	\$9.00
Denver	31.1%	26.6%	\$3.56	\$3.71	\$2.45	\$7.43	\$8.96	\$7.43
Minneapolis	40.3%	31.0%	\$2.46	\$3.59	\$1.47	\$2.48	\$12.78	\$10.53
Phoenix	28.1%	16.9%	\$2.72	\$5.35	\$1.96	\$4.45	\$12.43	\$6.35
Portland	34.7%	22.8%	\$2.51	\$3.95	\$1.64	\$3.05	\$13.06	\$11.28
Sacramento	30.2%	21.9%	\$3.12	\$4.27	\$2.18	\$3.34	\$11.75	\$10.68
Salt Lake	37.2%	17.2%	\$2.09	\$4.89	\$1.31	\$4.02	\$8.62	\$6.42
San Jose	15.2%	13.9%	\$5.81	\$6.29	\$4.93	\$5.41	\$18.77	\$13.22
Peer Average	27.5%	21.3%	\$3.58	\$4.48	\$2.71	\$3.59	\$14.05	\$9.52

In 2012, for the second consecutive Triennial Audit, the Federal Transit Administration (FTA) found no deficiencies in MTS's compliance with federal requirements. In this review, the FTA examined 24 areas of grant management practices and program implementation. Areas audited included legal, financial, technical, maintenance, procurement, project planning and programming, Title VI, and safety and security.

A contributing factor in MTS's efficiency has been its ability to negotiate and manage service contracts. More than half of MTS's bus service is contracted to private operators at a considerable savings to the agency. The contractors operate and maintain MTS vehicles from four MTS-owned maintenance facilities. In addition, MTS contracts with private operators for freight rail service as well as system security. MTS's commitment to contract management has been critical to ensure a seamless service delivery under optimum safety standards.

MTS expects that it can absorb the responsibilities and staff dedicated to LOSSAN with little difficulty and strongly believes that it can achieve levels of operational efficiency as the LOSSAN managing agency on par with its current successes.



MTS's Rail Operations and Management Experience

MTS and its staff have a lengthy history of rail operations, both in passenger rail and heavy freight rail.

In 1981, MTS (then the Metropolitan Transit Development Board) started the nation's first modern LRT (Trolley) line from downtown San Diego to the US-Mexico International Border (15.9 miles). Since then, the system has expanded to three lines, serving 53 stations on 102 miles of track. Over 7.5 million car miles and 400,000 train hours are operated on an annual basis.

The service has proven to be of high quality and attractive to passengers. For the most recent year, the Trolley's on-time performance was 90% and, with the exception of the economic decline in 2009-2010, the Trolley has continually increased ridership. Its ridership has increased seven percent in only two years and 28% in the last decade, to its 2012 total of 32.5 million passengers. Additionally, to date in FY13 the Trolley has only received 4.33 complaints for every 100,000 passengers, confirmation of customer satisfaction.

While many of the same fundamental principles apply to LRT and intercity rail, MTS is acutely aware of the differences, both in terms of target markets and actual operation. Where LRT passengers mainly expect quality service, on-time performance, and reasonable fares, intercity rail passengers are more discretionary and are willing to pay higher fares. In turn, however, intercity travelers expect additional amenities such as reserved seats, refreshment options, and upgraded accommodations. While MTS does not currently offer services with such amenities, it does operate premium express bus routes in over-the-road coaches that cater to the discretionary commuter market. These routes are similar to Amtrak Thruway bus services. MTS's experience in rail operations and premium services will allow it to not only maintain, but surpass, the high standards to which Amtrak and Pacific Surfliner patrons are accustomed.

MTS staff has significant heavy rail experience in the areas of risk management and legal support for Class I railroads, and operational management of freight rail, commuter rail, and intercity rail through partnerships, operating agreements, and staff's previous employment. MTS is an owner of a freight railroad and has negotiated contracts with SD&IV and PIR for use of track segment. MTS's most recent negotiation resulted in an investment agreement for the upgrade of MTS-owned tracks through eastern San Diego County in exchange for the right to operate along the improved alignment. Operation of freight service over MTS track has been successful on many fronts, the most recent of which required coordination of heavy construction efforts nightly during a temporal separation operating window. In March 2000, the FRA negotiated with MTS and approved the temporal separation waiver (the first of its kind nationally) for the day-to-day operation of the SD&IV freight line on MTS LRT segments, dispatched from the MTS Operations Control Center (OCC). SD&IV has been in operation and controlled in this manner for over 32 years. To date, several agencies throughout the country have followed MTS's lead and have FRA-approved temporal separation agreements for their shared-use rail transit and freight operating corridors.

MTS is also committed to a state of good repair with its rail infrastructure. It is currently halfway through work on the Trolley Renewal Project. This \$600 million project is meant to modernize and improve MTS's existing rail infrastructure. As part of the project, 33 station platforms will be raised to eight inches to accept low-floor LRT vehicles and each station will receive new shelters, benches, and next-train information signs. Additionally, MTS will essentially rebuild the entire 15-mile Blue Line. Blue Line service was implemented more than 30 years ago and some of the existing track was over 100 years old. The Blue Line rehabilitation project will result in the replacement of all overhead catenary and components, all 90-pound rail (to be replaced with 115-pound rail), grade crossing surfaces at 22 locations, and deteriorated track structure. New crossovers and signaling will also be installed throughout the line and transit centers will be reconfigured to better meet the needs of transferring passengers. Throughout this project a great deal of effort has been



put into making certain that MTS maintained operations and met the needs of the traveling public. The result has been a high level of customer satisfaction with the upgrades to the system and few complaints about the inconvenience.

Finally, MTS has also proven that it can successfully negotiate for the purchase of rolling stock. Within the past decade, MTS has negotiated for and purchased 76 LRT vehicles at a total cost of \$312.2 million.

MTS's experience in the Trolley Renewal Project, and the procurement of the vehicles, exemplifies the agency's skill in using creative approaches to finance large-scale capital projects. MTS was able to put together a complete financial package at a time when resources were significantly reduced. As managing agency, MTS can assist the LOSSAN management team in identifying ways to finance new rolling stock and leverage resources to accomplish corridor improvements.



MTS's Relationships with Other Corridor Agencies

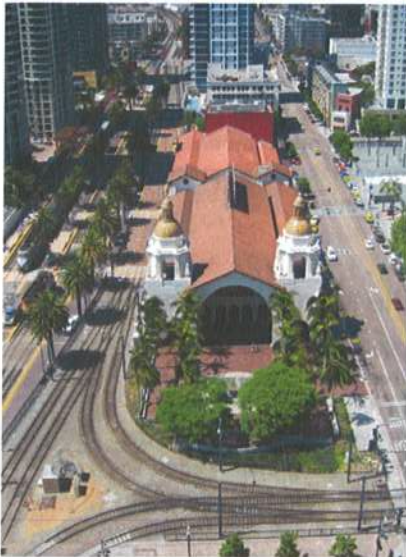
MTS has significant familiarity, experience, and established relationships with the FRA, CPUC, and Caltrans Division of Rail (DOR), as well as Amtrak and other agencies along the LOSSAN corridor. MTS also has contracts with Genesee & Wyoming, Inc./RailAmerica, Inc. to provide service on MTS-owned track and a shared-use agreement with the North County Transit District (NCTD), who controls the dispatching rights on the corridor over which the BNSF freight, Pacific Surfliner and NCTD Coaster commuter trains operate.

The MTS/NCTD shared-use agreement provides for storage of Coaster commuter rail trains at the MTS facility, Coaster operation over MTS-owned track south of Del Mar, and maintenance of the corridor by NCTD. Coaster commuter trains stop at three MTS transit facilities (Santa Fe Depot, Old Town, and Sorrento Valley) and the agencies coordinate to provide a positive customer experience and to ensure appropriate safety protocols are in place.

MTS has a long-established relationship with the FRA, as the FRA regulates the hours of service for signal maintainers and OCC personnel, as well as track, signaling and grade crossing requirements on segments of track on which SD&IV trains operate. In June 2000, MTS traveled with representatives from the FRA and the FTA to observe European "mixed discipline" shared track operating systems to learn about mitigation measures adopted to ensure that signal system safeguards effectively protect crossings. The Trolley has 83 grade crossings and MTS continues to work closely with the FRA and CPUC to ensure that each crossing meets all applicable state and federal safety requirements. Most recently, MTS obtained a waiver for 6-inch cant deficiency from the FRA on track over which the FRA has joint jurisdiction with the CPUC.

The strong, 32-year relationship that MTS and the CPUC have developed has involved operating and administrative aspects from audits and inspections to collaborating on General Orders (GOs). For example, MTS played a critical role in the revision of GO 143-B, which involves design standards, reporting, maximum hours of service, regulatory oversight, and procedures related to LRT operation in California. Additionally, the agencies worked together to develop, and subsequently modify, GOs involving LRT power and wayside functions. MTS has also proudly provided input on GO 164-D, the safety certification process for rail transit in California.

While MTS and Amtrak do not have a shared-use agreement with one another, Amtrak operations are included within the MTS/NCTD shared-use agreement. MTS and Amtrak also have a shared-operating arrangement at downtown San Diego's Santa Fe Depot and at Old Town and the two agencies work with one another to ensure positive customer experience and proper safety protocols. Over the last year, MTS has undertaken a facelift of the Santa Fe Depot as part of the Trolley Renewal Project. Throughout the process, MTS took into consideration the effects of construction and dynamics of passenger flow



on all modes that serve the station. MTS worked closely with NCTD and Amtrak during the construction efforts to ensure that the planned Green Line extension, which effectively turned the Santa Fe Depot/America Plaza complex into a regional transit hub, yielded the optimum benefit for all involved parties.

As a long-time member of the LOSSAN Board of Directors and Technical Advisory Committee (TAC), MTS also has familiarity with Caltrans DOR staff. Most recently, the two agencies worked together to implement a signage plan at Old Town Transit Center and MTS has collaborated with Caltrans Highway and Planning staff on freeway and rapid transit projects throughout San Diego County. Additionally, MTS believes that the managing agency should seek assistance from an outside consultant that has worked for Caltrans DOR and/or Amtrak to help lead its ITA efforts (see Task 3).

Furthermore, MTS has taken a lead in regional coordination in San Diego. MTS currently houses the countywide telephone information center (trip-planning assistance), the Regional Transit Management System (real-time tracking of transit vehicle location), and HASTUS scheduling software. MTS also produces the Regional Transit Map, routinely assists on region-wide transit information requests from SANDAG, and will soon house Compass Card staff (the regional fare system).

In terms of other LOSSAN member agencies, MTS and SANDAG have continuous interaction in a number of areas including financial programming, capital work, and planning. MTS has also been a member of the LOSSAN Board of Directors and TAC since its inception and has worked with other LOSSAN member agencies to amend the LOSSAN Joint Powers Authority (JPA) agreement and bring intercity rail operation under local control. MTS CEO Paul Jablonski was instrumental in working with NCTD to gain its approval of the amended JPA. MTS has worked with LOSSAN agencies on an individual basis as well, including peer reviews and collaboration on initiatives such as fare collection system implementation.

With seven different track owners and transit connections at the vast majority of the 41 stations along the corridor, it is imperative that coordination be a top priority of the managing agency, and MTS's history shows that it can work well with other entities. MTS will strive to increase cooperation among member agencies through the development of schedules, an emphasis on regional connectivity, and unified fare media.

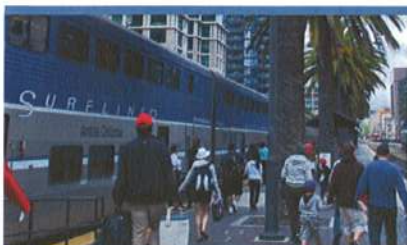
MTS's Understanding Regarding the Role of the Managing Agency

The role of the managing agency will change after the ITA is negotiated. Initially, if chosen, MTS will be involved extensively in day-to-day administrative support of the negotiations with the state and with the day-to-day functions of the JPA. During this period MTS will be responsible to the LOSSAN Board of Directors in all of the activities it engages in as the managing agency. However, once the ITA is established, MTS's role will primarily be to house the Intercity Rail Management Team (IRMT) and provide administrative support to the team and to LOSSAN under the direction of the Managing Director and the LOSSAN Board of Directors.

MTS understands that the Pacific Surfliner will not be an MTS service; rather it will be a service of the JPA. While MTS has vast rail and transit operating experience and will be ready and willing to provide any guidance and support, it recognizes that it will not be the decision maker for the service. Employees that are dedicated to the IRMT will report directly to the Managing Director, who will report directly to the LOSSAN Board of Directors. MTS CEO Paul Jablonski was a member of the LOSSAN CEO team that determined the degree of separation that should be maintained to ensure LOSSAN's autonomy in operating the Pacific Surfliner service.

MTS is in a unique position in that it does not operate or help fund any competing heavy passenger rail systems, freeing it of any conflicts of interest. Consequently, while MTS is knowledgeable regarding the corridor and has a stake in its success as an owner, it will be able to maintain an impartial perspective and make fair decisions that will benefit the entire corridor.





Location

Positioned at the southern terminus of the corridor, MTS is ideally situated to become the managing agency. MTS's rail yard is located just over one mile by rail from the Santa Fe Depot terminal, which positions it to potentially provide Amtrak services extra storage space and another location to store trains overnight. As managing agency, MTS could facilitate these types of discussions.



Conclusion

MTS is excited about the possibility of being selected as the LOSSAN managing agency and having an opportunity to assist in the improvement of the Pacific Surfliner service. With its location, experience of its existing staff, an organizational structure that promotes operational efficiencies, a history of healthy relationships with other corridor agencies, and no conflict of interest, MTS believes that it is the perfect agency to help start the era of locally-managed intercity rail in Southern California.

As such, in the following sections MTS will explain its proposed approach to accomplish various tasks in the establishment of a successful managing agency. In Task 1, MTS details its planned use of upper management staff to negotiate the Administrative Services Agreement (ASA). The LOSSAN staff transition and interim work plan will be accomplished with the use of current MTS staff, as described in Task 2. In Task 3, MTS explains its proposal of using upper management staff, with support of consultant staff, and the advice of both the LOSSAN Board of Directors and a Strategic Advisory Committee comprised of member agency CEOs, to negotiate the ITA. Next a proposed staffing plan is presented (Task 4) that is a combination of the proposed staffing plan in the Strategic Implementation Plan and one that is currently in place at the Capitol Corridor JPA (CCJPA). The approach to the establishment of the annual agency budget is presented in Task 5 and MTS's strategies to increase ridership along the corridor are presented in Task 6.



Task 1: ADMINISTRATIVE SERVICES AGREEMENT (ASA)

The ASA between LOSSAN and MTS will be negotiated by a small team of current MTS leadership, using the existing ASA between Bay Area Rapid Transit (BART) and the CCJPA as a guide.

Among other items to be negotiated, the ASA will include all managing agency responsibilities and powers identified in Sections 8.0 through 10.0 of the LOSSAN amended JPA, will identify certain positions to serve as dual roles for the JPA, will specify that the budget for LOSSAN business shall be the budget allocated by the state, will specify parameters for invoices and audits, will set the duration of the agreement (three years from the beginning of intercity rail service), and will set up terms for arbitration.



Since the CCJPA's ASA already provides a template and a solid basis for negotiations MTS does not expect negotiations with the LOSSAN Board of Directors to be prolonged. Upon being awarded the managing agency at the August 23 LOSSAN Board Meeting, MTS will be prepared to bring draft agreements to the LOSSAN Board of Directors on September 25 and to the MTS Board on October 10 for initial feedback. Finalized agreements will be presented to the LOSSAN Board of Directors on October 16 and the MTS Board on October 24, well ahead of the proposed November 20 timeline in the Request for Proposals. If a third round of meetings is required, the agreement could be approved by the MTS Board on November 14, in advance of the LOSSAN Board of Directors meeting on November 20.



The lead negotiator for MTS will be **Karen Landers**, General Counsel. Since joining MTS in 2011, Landers has negotiated several multi-agency and private agreements to coordinate public projects and allocate risk and financial responsibility. Examples of previous projects include a long-term operating agreement to rehabilitate MTS's 70-mile Desert Line freight railroad and an amended and restated shared-use agreement for track usage between MTS, NCTD and BNSF. Before being named as MTS General Counsel, Landers worked as a Senior Deputy County Counsel for the County of San Diego, where she negotiated agreements between the county and various public agencies and private entities for public works projects, real estate transactions and development projects. She also represented the county in negotiations with the State of California to finance projects and advised county departments on procurement and contracting issues. Landers will be supported by Paul Jablonski, Chief Executive Officer (CEO), and Sharon Cooney, Chief of Staff. Jablonski and Cooney's experience is detailed in *Task 3*.

Task 2: STAFF TRANSITION PLAN AND INTERIM WORK PLAN

While the ASA is being negotiated, MTS staff will work with SANDAG and Caltrans DOR staff to develop a detailed transition plan and interim work plan for the administrative responsibilities that are currently performed by both SANDAG and Caltrans DOR to ensure a seamless transition and to provide a solid foundation upon which the IRMT staff will be built.

SANDAG provided an outline of functions that are primarily support functions for the LOSSAN Board of Directors and TAC, but also includes web page development and maintenance, annual reporting, and regular joint advocacy activities with other intercity rail corridors. Within 30 days of the effective date of the ASA, MTS will submit a complete interim workplan to the LOSSAN Board of Directors which will include recommendations for work during the start-up period, any additional start-up funding needs, and sources of funding. An abbreviated plan is presented here.

CEO **Paul Jablonski** will assume the role of Interim executive director. He will lead the ITA negotiation team and will have executive oversight over LOSSAN business during the interim period. Jablonski's qualifications are further detailed in *Task 3*.

It is anticipated that MTS staff will handle the additional duties that are currently carried out by two SANDAG staff members, with an estimated 50% of their time dedicated to LOSSAN.

In consultation with SANDAG, **Brent Boyd** and **Rebecca Zelt** will staff the duties related to the Board and TAC, including setting meeting schedules, preparing agendas, conducting meetings, processing minutes, and coordinating the submission of Conflict of Interest forms (Form 700).

Boyd is a Senior Transportation Planner and Rail Operations Analyst with 12 years of transit experience. He is currently MTS's LOSSAN TAC representative and has been involved in briefing the MTS Board of Directors and staff leadership on all LOSSAN issues, including the development of the amended JPA. Boyd has extensive experience and technical expertise in service planning, scheduling, and performance monitoring for both bus and rail. He has experience planning and implementing transit service during capital projects in existing right-of-way and transit facilities. Most recently he was responsible for design and coordination of bus bridge service during the Trolley Renewal Project, which included over 40 weekend closures on the 15-mile Blue Line.

Zelt is the Executive Assistant to the Chief Operating Officer of MTS Rail and has been working on LRT projects for MTS since 1998. She has certifications in FTA Procurement Practices, Transit and Paratransit Management, and Project Management.

Boyd and Zelt will serve under the direction of **Sharon Cooney**, Chief of Staff. Cooney's experience is detailed in *Task 3*. Cooney will also oversee the joint advocacy functions and legislative issues.



Rob Schupp, Director of Marketing and Communications, will lead the bi-monthly joint marketing staff conference calls. Schupp has more than 30 years of marketing experience, which is detailed in *Task 4*.

LOSSAN will have its own dedicated web page (linked from the main MTS page) that will include meeting agendas and minutes, published reports, and general information about the corridor. The MTS Marketing department will handle web page development, while the MTS Information Technology department will handle web page maintenance. Nara Lee, MTS's Digital Design and Content Specialist, will be the designer of the website. Lee is currently in the process of leading a re-design of MTS's website.

The MTS Finance Department will develop the LOSSAN budgets in the interim years and handle all accounting and invoicing issues. The MTS Finance Department's capabilities are detailed in *Task 4*.

In all cases, LOSSAN work will be led by CEO Paul Jablonski. While Jablonski will not be involved in all day-to-day functions, he will have oversight and responsibility for any work performed for LOSSAN business.

During the transition period it is anticipated that meetings, particularly Board of Directors and TAC meetings, will continue to be held in Los Angeles. Alternate meeting locations may be determined by the LOSSAN Board of Directors, and MTS staff will travel for the convenience of other member agencies. As appropriate, meetings may be conducted as conference calls or may be rotated among other member agencies. If it is desired that meetings to take place in San Diego, MTS will make conference rooms available (including the MTS Board Room).

The most important aspect of the interim/start-up period, however, is the negotiation of the ITA with the state. MTS envisions that the ITA negotiation team will be comprised of key upper management personnel, with the assistance of contracted legal, facilitation, and technical staff. MTS also envisions forming a Strategic Advisory Committee of other LOSSAN CEOs to use as a sounding board and for assistance with negotiations. The specifics of the ITA negotiations are discussed in *Task 3*.

Toward the end of the interim/start-up period, as the ITA is nearing finalization, MTS will begin the process of hiring the Managing Director, with consultation and approval from the LOSSAN Board of Directors. The desire would be to hire the Managing Director a few months prior to the beginning of operations, allowing the Managing Director to become familiar with critical issues and to assemble the IRMT staff prior to the start-up date. The process of hiring a Managing Director is detailed in *Task 4*.

It is expected that MTS will rely heavily on SANDAG's guidance during the transition. MTS understands that SANDAG staff has extensive experience with LOSSAN issues and positive working relationships with other member agencies that MTS hopes to use to its advantage. MTS's offices are conveniently located in downtown San Diego, only one mile from SANDAG's offices. MTS staff members regularly attend to business in SANDAG's offices and the staffs work extremely well with one another. With such close proximity and good working relationships, it is expected that the transition will be smooth.

To be conservative, MTS is planning for a 19-month interim/start-up period (from December 2013 through June 2015). However, once the ASA is signed, MTS will immediately begin work on the ITA. If those negotiations proceed quickly, MTS is willing to start the service at an earlier date.



Task 3: INTERAGENCY TRANSFER AGREEMENT (ITA)

The ITA will be the most important part of the interim/start-up period for the managing agency. Section 5 of Senate Bill 1225 states that the ITA should accomplish the following:

1. Specify the date and conditions for the transfer of responsibilities and identify the annual level of funding for the initial three years following the transfer.
2. Identify the funds to be transferred to the Board of Directors.
3. Specify the level of service to be provided, the respective responsibilities of the Board of Directors and the department, the methods that the department will use to assure the coordination of services, the annual review of the business plan and annual proposals on funding and appropriations.
4. Describe the terms of use of rolling stock and other equipment and property required for the intercity service.
5. Describe auditing responsibilities and process requirements, reimbursement and billing procedures, the responsibility for funding shortfalls, an operating contract oversight review process, performance standards and reporting procedures, the level of rail infrastructure maintenance, and other relevant monitoring procedures.

MTS also reviewed the existing ITA between CCJPA and the State of California to determine the proper expertise required to negotiate the ITA on behalf of LOSSAN.

An issue that will need to be resolved in the LOSSAN ITA, that was not required in the CCJPA agreement, is how to ensure that non state-owned rolling stock will remain on the LOSSAN corridor. All of the CCJPA's rolling stock are owned and controlled by the state, while the vast majority of the rolling stock on the LOSSAN corridor is controlled by Amtrak. Consequently, an agreement will need to be reached among LOSSAN, Caltrans, and Amtrak regarding the deployment of rolling stock on the corridor.

MTS is prepared to negotiate the ITA with a combination of current staff, contracted help, and the expertise of fellow LOSSAN members. The negotiations will be led by CEO Paul Jablonski with support from MTS staff and contracted technical, legal, and facilitation assistance. The negotiations, as a whole, will be guided by a proposed Strategic Advisory Committee (comprised of the CEOs of other LOSSAN member agencies) and the LOSSAN Board of Directors. Moreover, the San Joaquin Joint Powers Authority (SJJPA) is expected to negotiate an ITA with the state simultaneously with LOSSAN. MTS anticipates that a collaborative effort with SJJPA would be beneficial and aid in more productive negotiations.

Lead Negotiation Team

The negotiation team will be led by CEO **Paul Jablonski**. Jablonski has been the CEO of MTS since 2004, has 42 years of transit experience, and currently oversees a budget of nearly \$250 million and 2,500 MTS employees and contracted personnel. Jablonski is highly respected in the public transit industry. He currently chairs the Executive Committee of the California Transit Association (CTA), the APTA Rail CEO Committee, and the APTA Rail Transit Committee. Additionally, he is co-chair of the weekly LOSSAN CEO conference calls and is intimately familiar with the advantages and challenges of both amending the JPA and assuming the role of the managing agency.

In Jablonski's time at MTS he has reorganized the agency and, with his foresight, has helped MTS avoid the drastic service cuts that many transit agencies experienced in the last five years despite the elimination of \$30 million of annual state funding. He has helped turn MTS into one of the most efficient transit operators in the country (as detailed in the introduction); has led the restructure of nearly all bus services through a comprehensive operational analysis; opened a 6-mile, \$500 million Trolley extension; and is currently implementing the



rehabilitation of the 15-mile Blue Line, expanding freight capacity, and introducing low-floor cars system-wide as part of the overall \$600 million Trolley Renewal Project.

Jablonski has experience with contracted service models, including a five-year, \$55 million annual private-sector service contract, which saved \$19.2 million in the procurement process, held expense growth to three percent annually, and obtained 26 new over-the-road coaches for express bus service. He has experience working with both the FRA and CPUC, has experience operating a freight railroad line through the SD&IV, and is experienced in railroad construction and fare collection.

Jablonski is well-versed in negotiations and has negotiated with public entities, universities, cities, counties, state governments, and transit authorities. He has negotiated many labor contracts, service agreements, management contracts, the procurement of rolling stock (most recently a 65-car, \$265 million contract), right-of-way purchases with both Conrail and Norfolk Southern, and has overseen the negotiations of a lease to a short-line railroad on MTS-owned track.

Technical Assistance of Intercity Rail Expert

While Jablonski has a strong background in transit operations and negotiations, he has not worked extensively with intercity rail, and it is important to have someone with intercity rail expertise to assist with the negotiations.

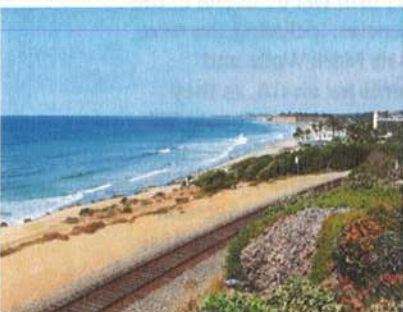
For the ITA negotiations, MTS will retain a part-time intercity rail expert experienced with freight and passenger railroad operations. The intercity rail expert's background will ideally include experience at Amtrak and/or Caltrans DOR, experience with both increasing revenue and ridership on intercity routes, and reducing costs through staffing efficiencies and other methods. Additionally, the intercity rail expert will ideally have experience with contract negotiations, capital rail program management, federal grants, transportation program management, multi-agency coordination, capital project development, and strategic planning.

Negotiation Support Team

In addition to Jablonski and the intercity rail expert, MTS has assembled a strong negotiation support team filled by MTS and contracted experts in legal, transportation, procurement, right-of-way and financial issues and will reinforce that team with its on-call legal and facilitation consultants. The MTS support team will include the following personnel:

Contracted Legislative Representative (Smith, Watts, & Martinez) – LOSSAN and the MTS negotiating team will be assisted in its efforts by MTS's Sacramento legislative representative. MTS has had a long-standing contractual relationship with Smith, Watts & Martinez. It is anticipated that from time to time the firm will be useful in the development of strategy and coordination with key state agencies, including the new transportation agency, Caltrans DOR, and the CPUC. Principals Mark Watts and D.J. Smith have a long history with the underlying requirements for an ITA, as they were each instrumental in the creation of the original transfer legislation, Senate Bill 457. Watts also participated in the advocacy surrounding the passage of Senate Bill 1225. Both men have strong working relationships with individuals who will lead the negotiation of the ITA on behalf of the state, including Brian Annis (Deputy Secretary for Transportation Policy), William Bronte (Division Chief for Caltrans DOR), Kome Ajise (Deputy Director for Planning and Modal Programs), and Brian Kelly (Acting Secretary, Business, Transportation and Housing Agency).

Sharon Cooney, Chief of Staff – Cooney will be providing general assistance with the negotiations. Cooney has provided strategic and governmental support to the MTS CEO and Board of Directors since 2005. Cooney manages the government affairs, planning, scheduling, and performance monitoring functions for the entire agency. She is also responsible



for Taxicab Administration, a department that coordinates taxicab regulation for seven cities, including San Diego. She has extensive experience working with external agencies and Boards of Directors, and has been involved in a variety of inter-agency negotiations. Transportation financing is also an area of expertise.

Karen Landers, General Counsel – Landers will lend support on all legal issues in regard to the negotiations. Landers will be the lead negotiator of the ASA and more information on her background is presented in *Task 1*.

On-call legal consultants will assist Landers as-needed. Currently, MTS has four legal firms on call that have rail experience. Those firms are:

- **Best Best & Krieger** (Multiple offices, including San Diego and Sacramento)
- **Hanson Bridgett** (Multiple offices in Northern California, including Sacramento)
- **Nossaman LLP** (Multiple offices throughout California, including Sacramento)
- **Baker & Miller** (Federal Railroad Counsel; Offices in Washington, DC)

Wayne Terry, Chief Operating Officer, MTS Rail – Terry is responsible for all rail operations for MTS and will be assisting in all facets of the negotiation regarding issues directly related to rail transportation. He has held leadership positions at MTS Rail for over 30 years and became the COO in 2008. Terry has spent his 41-year career in transportation working all facets of light and heavy rail operations and brings a broad range of industry knowledge to the negotiations. He worked at the Atchison Topeka & Santa Fe Railroad (AT&SF) until joining MTS.

At MTS, he has played a leading role in the design and implementation of nine LRT service expansions and has assisted in the development of the Trolley Renewal Project that is replacing/upgrading the aging infrastructure, including catenary, grade crossings, stations, track, and signaling. He also coordinated the development of a regional multimodal railway terminal, maximizing connectivity and scheduling efficiencies. During his time at AT&SF, Terry supervised train crews, locomotive power, freight tonnage, and general train operations.

Terry is well-known in the transportation industry and has served on numerous committees, including the California Transit Association's (CTA) Rail Operations and Regulatory Committee (developed in partnership with the CPUC), APTA's Operating Standards and Practices Committee and the Rail Transit CEOs Committee. His expertise has been sought out on projects such as San Francisco Municipal Railway Company's (MUNI) Maintenance Facility Expansion, Minneapolis Metro Transit's Hiawatha Corridor Alignment Review, Sound Transit's Tunnel Cost Overruns, Hudson-Bergen's LRT Start-Up and the Bayonne Flyer Express Service.

Fred Byle, Superintendent of Wayside Maintenance, MTS Rail – Byle will be assisting in all facets of the negotiation related to transportation and maintenance. He has nearly thirty years of light and heavy rail experience and has extensive signaling, traction power, track, right-of-way, and facilities expertise. Byle is credited with the creation of the MTS Rail Standard Operating Procedures for signals and the development and implementation of the Roadway Worker Safety training program. He was instrumental in the design review and start-up of an extension of the Trolley's Green Line and in the development of upgrade strategies and replacement needs for the Trolley Renewal Project.

Prior to his career at MTS, he was responsible for safety, operations, marketing and financial performance of two short-line railroads (SD&IV and Salt Lake City Southern). His tasks during that time included management of daily railroad operations, development of service strategies, federal and state regulatory compliance, instruction in train handling, air brake, and operating rules, and coordination of daily train crew assignments. Byle also has expertise in freight car inspection and repair, track structure design, track maintenance and inspection, locomotive maintenance and inspection, and the general code of operating rules.

Ernesto DeGuzman, Manager of Procurement – DeGuzman will be aiding the negotiations regarding issues dealing with procurement. DeGuzman has been Manager of Procurement for two years at MTS and has experience with Class I railroads. His experience is detailed in *Task 4*.



Larry Marinesi, Director of Financial Planning and Analysis – Marinesi will be aiding the negotiations with regard to financial issues. Marinesi is responsible for the development and financial reporting of the MTS operating and capital budgets valued at nearly \$250 million and \$60 million, respectively. He is the financial lead in the negotiation of large organizational agreements and also participates in the financial aspects of negotiations with the four labor unions whose members are employed at MTS.

Tim Allison, Manager of Real Estate Assets – Allison will be aiding the negotiations with regard to real estate issues. Allison is responsible for over 150 miles of railroad right-of-way, office and maintenance facilities, and approximately \$1.6 million in real estate revenue. He manages the real estate asset management and development, third party engineering permits and approvals, capital property acquisitions, third party agreements affecting real estate, and the Transit Oriented Development Program.

Other than time required by the CEO, General Counsel, and Chief of Staff, support staff will be provided at no cost.



Strategic Advisory Committee

MTS proposes the establishment of a Strategic Advisory Committee. The Strategic Advisory Committee would be comprised of the CEO or designate for each LOSSAN member agency. Meetings would be held bi-weekly (or as frequently as agreed upon) throughout the negotiation of the ITA for the purpose of updating member agencies on the negotiations as well as receiving feedback. Agencies would be encouraged to bring technical staff to provide further input. Furthermore, MTS recommends that **David Kutrosky**, the executive director of the highly-successful Capitol Corridor be asked to join the committee. Kutrosky has over a decade of experience in intercity rail operations at the CCJPA under an ITA negotiated with Caltrans DOR.

It is anticipated that these meetings would be held via conference call, but would occasionally be held in person in either San Diego or Los Angeles (or elsewhere), depending on the preference of the committee.



LOSSAN Board of Directors

MTS recognizes that the LOSSAN Board of Directors will have the final approval of the ITA, so it is important to keep the Board of Directors involved and informed at all stages of the negotiation. Each month, MTS will provide an update on the negotiations to the Board of Directors. MTS will detail the status of the negotiations and the discussions that have taken place during the Strategic Advisory Committee meetings, and will request feedback from the Board of Directors.

MTS will also provide updates to the TAC on a monthly basis.

Timeline

MTS has conservatively planned to use the entire 19-month window provided for the interim/start-up period. However, MTS will make every effort to expedite the negotiations. While it is important not to rush the negotiation, MTS agrees with LOSSAN that it is important to implement local control of the Pacific Surfliner service as soon as possible, and every effort will be made to ensure that time is not wasted. The regular meetings with the Strategic Advisory Committee, LOSSAN Board of Directors, and TAC will ensure that progress is occurring at a reasonable rate.



Task 4: MANAGING AGENCY FACILITIES AND STAFFING

MTS proposes a two-pronged staffing plan. There will be a main ITA negotiation team, as detailed in *Task 3*. This team's primary focus will be to negotiate the agreement with the state. As the negotiating team works, the hiring process for the IRMT staff will begin.

The transition to the initial period will be seamless since much of MTS's upper management will be involved in the negotiations. The staffing plan will be detailed as follows:

1. Staff Team for Negotiation of ITA and Managing Agency Set-up
2. Managing Director
3. Intercity Rail Management Team Structure and Hiring Process
4. MTS Staff Supporting Roles (Shared Positions)
5. Facilities



Staff Team for Negotiation of ITA and Managing Agency Set-up

As described in *Task 3*, the ITA negotiating team will be led by MTS CEO Paul Jablonski and a contracted intercity rail expert and will be supported by MTS staff and on-call consultants. Combined, this team will have expertise in rail operations and maintenance, legal, financial, procurement, and right-of-way issues. The negotiation team of the ITA will be assisted by other LOSSAN member agencies with the establishment of a Strategic Advisory Committee and will provide regular updates to the LOSSAN Board of Directors and TAC.

As the negotiations near conclusion, the foundation of the Managing Agency's rail staff will begin to take form. Until that time, the existing MTS staff will absorb the LOSSAN responsibilities currently borne by SANDAG, including meeting support, maintenance of the LOSSAN website, annual reporting, and joint advocacy functions.



Managing Director

As negotiation of the ITA proceeds, MTS will begin the hiring process for the Managing Director. The Managing Director will oversee all LOSSAN day-to-day operations and will report directly to the LOSSAN Board of Directors for all policy and service-related issues.

The Managing Director will oversee and direct rail and Thruway bus service delivery for the LOSSAN corridor; develop and implement budgets, goals, and business plans; direct and support all rail operations functions to ensure LOSSAN objectives and state performance standards are met; coordinate rail operations activities to ensure peak performance and productivity, as well as conform with external regulations and policies; develop and implement strategic business plans focusing on rail transportation needs in cooperation and coordination with all LOSSAN corridor member agencies; develop and implement programs to improve service quality, reduce costs, and increase revenue and ridership; monitor operating performance, facilitate problem resolution, and direct efforts to achieve continual improvement in service quality; obtain support resources from the managing agency; work cooperatively with member agencies to maintain the integrity of regional transportation; represent LOSSAN before public agencies, the business community, and the public; meet with officials on programs, proposals, and related issues; and adhere to budget, goals, and schedules.

MTS recommends that the Managing Director will have a bachelor's degree in business administration, public administration or a closely-related field from an accredited college or university and a minimum of 10 years of director-level public or private transportation experience. Related work experience may be substituted for the educational requirement.





Since the Managing Director will report to the LOSSAN Board of Directors, the Board of Directors will be involved throughout the entire process, and will ultimately make the final decision. Before the selection process begins, MTS will encourage the Board of Directors to form a selection committee. This selection committee would set criteria and desired attributes for the Managing Director position.

Using the criteria set forth by the selection committee, MTS's Human Resources department will undertake a nationwide search, using social/professional media websites, nationwide and niche job boards, and other recruiter networks and contacts. If the internal search effort is not successful, an executive search firm will be retained.

Ideally, the initial field of applications would be narrowed down to 3-5 finalists through the assistance of the selection committee, and would then be interviewed by the selection committee. The LOSSAN Board of Directors would make the final decision from those 3-5 candidates.

MTS envisions the Managing Director to be hired four months prior to the beginning of intercity rail service. This will give the Managing Director time to hire the remainder of the IRMT staff and allow that staff to begin work roughly 1-2 months before locally-controlled service commences.

Intercity Rail Management Team Structure and Hiring Process

After consulting the LOSSAN Strategic Implementation Plan and interviewing CCJPA staff, MTS is proposing a 12-person team dedicated to the operation of the Pacific Surfliner and other LOSSAN business. The team will be supported by many MTS departments. The 12-member IRMT compares to an 11-member team proposed in the LOSSAN Strategic Implementation Plan and a slightly larger team than employed by the CCJPA. While the 12-member team is larger than that identified in the LOSSAN Strategic Implementation Plan, MTS's overall budget is on par with that specified in the plan due to its lower estimated overhead and shared staff expenses.

The IRMT staff will become part of the MTS organizational structure as MTS Rail employees. The IRMT staff will report to the Managing Director, who will report directly to the LOSSAN Board of Directors, while administrative support functions would be handled in consultation with the MTS CEO. MTS has experience with this type of arrangement, as its General Counsel and Internal Auditor have a direct relationship with the MTS Board of Directors.

HIRING PROCESS

The MTS hiring process is a detailed and fair process. Complying with all laws and agency policies, the Human Resources department is responsible for the recruiting, processing and hiring for management, non-management and union positions.

It is recommended that the Managing Director be hired four months before the start of service, with the Executive Assistant/Clerk of the Board hired soon thereafter, the direct reports to the Managing Director hired two months prior to the service start-up date and the remaining staff hired approximately one month before the start of service. The hiring process for the Managing Director is discussed above. The hiring process for the remaining IRMT positions will be a collaborative effort between the MTS Human Resources department and the Managing Director.

The typical MTS hiring process begins with advertising on relevant online job boards and sourcing qualified candidates through social media sites, including LinkedIn. The recruitment team reviews resumes and conducts job-specific testing and selects the most qualified applicants to send to the hiring manager. The hiring manager then selects a smaller group for the recruiter to interview by phone. From there, in-person interviews are typically conducted by a panel comprised of the hiring manager, the recruiter, and any other invested parties. After the panel decides on a top candidate, the recruiter initiates a background screening that includes a criminal, civil and reference check.



Most positions also require a pre-employment physical and drug screen. The recruiter ends the process by negotiating a salary, coordinating a start date and conducting a new hire orientation on the hire date.

The IRMT staff will receive a competitive compensation package, including health insurance, annual leave, retirement investment opportunities, and other benefits.¹ The positions will be based in the San Diego office (see Facilities section), with the transportation and mechanical positions based in both San Diego and at the Amtrak facilities in Los Angeles.

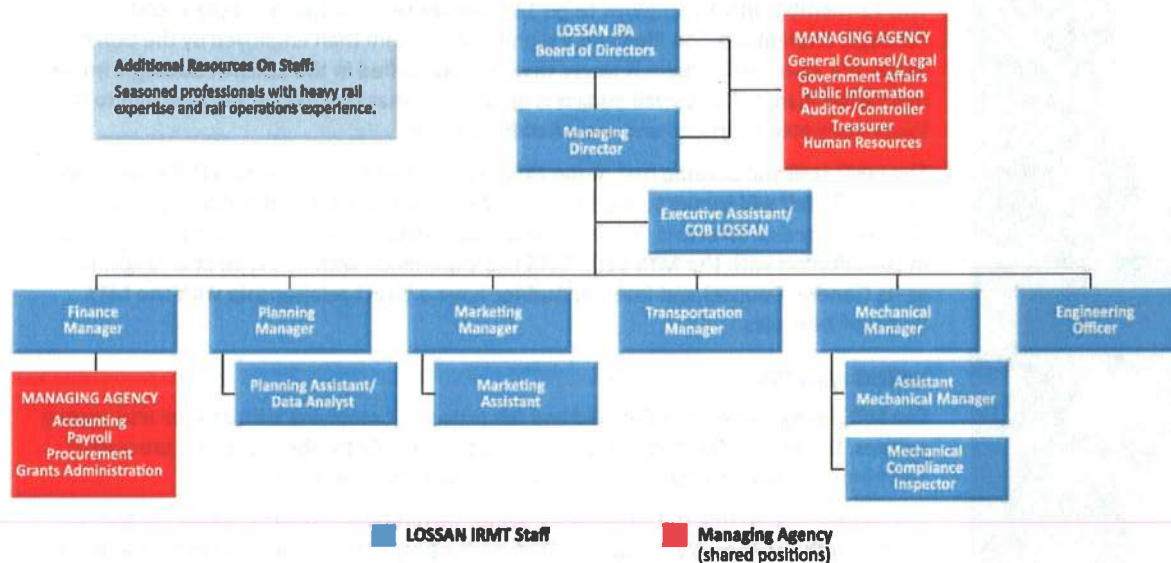
IRMT PERSONNEL STRUCTURE AND RESPONSIBILITIES

The Managing Director will have the following direct reports: Planning Manager, Marketing Manager, Finance Manager, Transportation Manager, Mechanical Manager, Engineering Officer, and Executive Assistant/Clerk of the Board. Other IRMT staff positions will include the Planning Assistant/Data Analyst, Marketing Assistant, Assistant Mechanical Manager, and Mechanical Compliance Inspector. Current MTS staff will provide support for the following activities/positions: General Counsel/Legal, Government Affairs, Public Information Officer (PIO), Auditor, Treasurer, Accounting, Human Resources, Procurement, Grants Administration, and other miscellaneous activities. MTS Rail operations staff will be available for support, but will not have official LOSSAN responsibilities. The proposed organization chart is presented below.

While the organization chart is MTS's recommendation, MTS is flexible and is willing to alter the organization chart based on future discussions with other LOSSAN member agencies and at the direction of the Managing Director.

Figure 5

Proposed LOSSAN Personnel Structure



The main differences between MTS's proposed staffing plan and the staffing plan presented in the LOSSAN Strategic Implementation Plan are:

1. **Change Deputy Director/Director of Finance to Finance Manager and have both the Planning Manager and Marketing Manager report directly to the Managing Director** – It was important to MTS to reduce as many layers in the organization chart as possible to create more open lines of communication and additional efficiencies.

¹ Benefits will include CalPERS pension at 2% at 62 (with employees contributing 6.25% each pay period); nine paid holidays; four floating holidays; 144 hours of annual leave (184 hours after three years and 224 hours after 10 years); medical coverage through HMO or PPO through Anthem Blue Cross or Kaiser; dental coverage through a self-insured PPO dental plan administered by Employee Benefits Association (EBA); vision reimbursement through EBA; short-term disability, long-term disability, and basic life insurance; basic accidental death and dismemberment through Prudential Insurance; free transit pass for employee and dependents; computer reimbursement (up to 25%); tuition reimbursement (up to \$1,000); deferred compensation plans (ICMA 457, ICMA 457(b) Roth, ICMA 401(a), and ICMA Roth IRA), flexible benefit plans (health expenses up to \$2,500 and dependent care expenses up to \$5,000); and voluntary life insurance offered through Prudential. MTS Rail employees do not contribute to Social Security.

2. **Addition of Planning Assistant/Data Analyst** – The Planning Assistant/Data Analyst will assist with data collection and analysis for all facets of the organization. While not necessarily restricted to a planning position, it will report to the Planning Manager.
3. **Combine Administrative Assistant with Board Secretary** – MTS believes the tasks required of those two positions can be completed by one employee.

The CCJPA staff is larger than the proposed staff in the LOSSAN Strategic Implementation Plan. However, CCJPA started off with a smaller staff and expanded over time. It is MTS's expectation that a similar pattern will occur in Southern California. The staff will start relatively small, and expand as necessary through negotiations with the state, though MTS is anticipating that this will not be required in the initial three-year term. CCJPA also oversees rolling stock maintenance on the San Joaquin line, so fewer staff will be required of the LOSSAN rail management team.

The general duties and qualifications for each position are detailed below. Additional duties and responsibilities will be added during the recruitment process at the direction of the Managing Director and through further discussion with the LOSSAN Board of Directors and other LOSSAN member agencies.

EXECUTIVE ASSISTANT / CLERK OF THE LOSSAN BOARD OF DIRECTORS

The Executive Assistant/Clerk of the Board will be responsible for a variety of complex executive support work requiring specialized knowledge and experience and will coordinate/manage meetings; act as Clerk of the LOSSAN Board of Directors, prepare board reports, attend all meetings, and transmit meeting minutes; provide executive support for the Managing Director and administrative support for other agency staff; publish and post all meeting notices within prescribed legal requirements to ensure that the agency meets Brown Act requirements; and maintain all Board-related information.

Qualifications: Associate's degree in a business-related field from an accredited college or university; minimum of 10 years of increasingly responsible experience providing administrative support to executive or management staff. Related work experience may be substituted for the educational requirement.

FINANCE MANAGER

The Finance Manager will be responsible for all facets of financial oversight for LOSSAN and will coordinate with MTS staff to seek, obtain, and administer grants; prepare and submit internal and external financial reports, the annual business plan, fare analyses, and capital and operating budgets; track all fund sources; manage all accounting and financial functions; develop, implement and manage the internal control environment for all financial functions; coordinate financial closing processes and reporting; and coordinate audits.

Qualifications: A bachelor's degree in business administration, with a concentration in accounting, finance or a closely related field from an accredited college or university; CPA certification strongly preferred; minimum of six years of professional public or private transportation and three years of management responsibility. Related work experience may be substituted for the educational requirement.

PLANNING MANAGER

The Planning Manager will be responsible for a variety of issues related to the short- and long-range planning of the corridor and will develop and implement goals, objectives, policies and priorities for planning and capital programs; monitor and evaluate existing service and staffing levels and recommend necessary changes; recommend schedule adjustments; prepare corridor strategic plans; prepare ridership projections; manage planning aspects of expansions, extensions, and/or service development; assess future demographic trends, right-of-way issues, and funding alternatives; coordinate services among all corridor transportation providers; study long-term capital needs of the corridor; prepare operational studies and service/extension planning problem analyses; and present to various stakeholders.





Qualifications: A bachelor's degree in transportation planning, or a related field, from an accredited college or university; with a minimum of eight years of professional experience in transit or rail planning, with increasing responsibilities. Related work experience may be substituted for the educational requirement.

PLANNING ASSISTANT / DATA ANALYST

This position will report to the Planning Manager, but will have responsibilities for data collection and analysis for all IRMT functions, including analyses of ridership trends, on-time performance, food car service, and maintenance issues.

Qualifications: A bachelor's degree in business, planning, or a related field from an accredited college or university; with a minimum of three years of professional experience in public transit. Related work experience may be substituted for the educational requirement.

MARKETING MANAGER

The Marketing Manager will be responsible for providing both customers and the community-at-large with relevant and appropriate communications; coordinate efforts with member agencies; oversee the design and development of public and customer information, marketing materials, and promotions; coordinate outreach and advertising efforts; administer website; promote the benefits of intercity rail travel to corridor communities; develop annual and quarterly regional marketing plans, goals, objectives, and strategies; foster partnerships to expand market and create new revenue streams; produce and distribute media releases and agency information materials; serve as agency media liaison; and manage telephone information center.²

Qualifications: A bachelor's degree in journalism, communications, marketing, or a closely related field from an accredited college or university; with a minimum four years of professional experience in the areas described above. Related work experience may be substituted for the educational requirement.

MARKETING ASSISTANT

The Marketing Assistant will report to the Marketing Manager and will be responsible for planning, coordinating, implementing and supervising a variety of marketing activities; coordinate marketing campaigns with LOSSAN member agencies; coordinate and implement community outreach; serve as key contact and provide direction and assistance to ticketing offices and kiosks; update brochures, fact sheets, timetables and other printed materials; ensure that printed material is fully stocked at places of distribution; plan and implement programs and projects to increase awareness and ridership; and coordinate of group travel.

Qualifications: A bachelor's degree in marketing, communications, public relations, journalism or equivalent from an accredited college or university; with a minimum two years of experience in the areas described above. Related work experience may be substituted for the educational requirement.

TRANSPORTATION MANAGER

The Transportation Manager will be responsible for operational planning and supervision of contracts for train and bus operations, on-board services, and station operations; manage transportation budget; prepare annual near and long range forecasts; monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; estimate equipment needs; and recommend appropriate staffing levels. This position will be based primarily in Los Angeles and other operational facilities.

Qualifications: A bachelor's degree in transportation management, engineering or a related field from an accredited college or university; with progressively responsible experience in railroad operations; experience as a high level supervisor/manager of a substantive rail operational function current knowledge and understanding of state-of-the-art rail activities. Related work experience may be substituted for the educational requirement.

² MTS proposes the use of its existing customer telephone information center to address customer concerns regarding Pacific Surfliner service. This is addressed on Page 23.



ENGINEERING OFFICER

The Engineering Officer will manage elements associated with the administration and maintenance of right-of-way, including track, stations, and maintenance facilities; manage and plan capital program; review preliminary engineering and final design; oversee corridor-related construction activities; maintain project control; and develop budgets.

Qualifications: A bachelor's degree in engineering or related field from an accredited college or university with extensive, progressively responsible experience in rapid transit or railroad in all aspects of wayside maintenance management. Related work experience may be substituted for the educational requirement.

MECHANICAL MANAGER

The Mechanical Manager will oversee contracted maintenance and repair of rail cars and locomotives and ensure contractual compliance; develop and administer programs and implement goals, objectives, policies and priorities; monitor and evaluate appropriate maintenance procedures, plans, and schedules for rail cars and locomotives; evaluate work products; and manage division's annual budget, including forecasting funds needed for staffing, equipment, materials and supplies. This position will be based primarily in Los Angeles and will be required to travel to other maintenance and layover locations (Goleta, San Luis Obispo, and San Diego).

Qualifications: A bachelor's degree in business administration, engineering, public administration or a related field from an accredited college or university; with a minimum of five years progressively responsible experience in rail vehicle maintenance management. The candidate must possess a strong technical background, with demonstrated ability and a thorough understanding of applicable regulatory standards. Related work experience may be substituted for the educational requirement.

ASSISTANT MECHANICAL MANAGER

The Assistant Mechanical Manager will report to the Mechanical Manager and will assist in the oversight of contracted maintenance and repair of rail cars and locomotives; assist in the monitoring and evaluation of appropriate maintenance procedures, plans, and schedules for rail cars and locomotives; and evaluate work products. This position will be based primarily in Los Angeles and will be required to travel to other maintenance and layover locations (Goleta, San Luis Obispo, and San Diego).

Qualifications: A bachelor's degree in business administration, engineering, public administration or a related field from an accredited college or university; with a minimum of three years progressively responsible experience in rail vehicle maintenance management. The candidate must possess a strong technical background, with demonstrated ability and a thorough understanding of applicable regulatory standards. Related work experience may be substituted for the educational requirement.

MECHANICAL COMPLIANCE INSPECTOR

The Mechanical Compliance Inspector will ensure that revenue rail cars, locomotives, and contract buses used in LOSSAN corridor service operations meet all federal and state regulatory standards. This position will be based primarily in Los Angeles and other operational facilities.

Qualifications: A high school diploma or high school equivalency certificate and supplemental training in rail vehicle maintenance regulatory compliance; with progressively advanced positions/experience in rail vehicle maintenance. Must know how to operate the special test equipment and instruments utilized, possess a strong technical background with demonstrated ability, and have a thorough understanding of applicable regulatory standards.



MTS Staff Supporting Roles (Shared Positions)

MTS is dedicated to providing the IRMT with financial and administrative support functions, allowing the IRMT to focus their efforts as required by LOSSAN. MTS sets the bar very high with its extremely efficient administrative functions and operating staff, and it is confident that its existing infrastructure can absorb the additional duties that will be required by LOSSAN with minimal costs. The following is a summary of positions/responsibilities that MTS will provide on behalf of LOSSAN.

GENERAL COUNSEL / LEGAL

Legal assistance to LOSSAN will be provided by Karen Landers, General Counsel. Landers will report directly to the LOSSAN Board of Directors in cooperation with the Managing Director. Landers' background is described in *Task 1*. Additionally, MTS has four on-call legal firms that specialize in railroad operations that will be available for assistance. These firms are Best Best & Krieger, Hanson Bridgett, Nossaman LLP, and Baker and Miller. Right-of-way issues will also be handled by the Legal department, and specifically by Tim Allison, Manager of Real Estate Assets. Allison's experience is described in *Task 3*.

RISK MANAGEMENT

MTS's Risk Management department is staffed by four full-time employees, including a seasoned Risk Manager (Susan Lockwood) with more than 28 years of public entity risk management experience (12 of these years involved working with heavy rail exposures). The department reports to the General Counsel, boosting cohesiveness between legal and risk management issues with skilled claims handling and litigation management. The department will provide thorough analysis of risk-related issues and expert advice. Examples of tasks previously and/or currently coordinated by MTS's Risk Manager include:

- Served as project manager on owner-controlled insurance program contract during the building and close-out of NCTD's Sprinter rail construction project, which involved meeting and conferring on operating issues of freight railroad that shared the track. Also, served as Safety Committee chairperson and on-site claims review chairperson during the five-year process.
- Reviewed shared-use agreements between MTS, NCTD and BNSF from an insurance and indemnification standpoint.
- Reviewed draft positive train control and dispatching control center contracts for insurance and indemnification language while with NCTD.
- Handled all liability claims from start to finish against public transit agencies and commuter and LRT contractors.

A clear understanding of the manner in which LOSSAN corridor agencies have structured risk management and insurance programs will be essential in the establishment of the JPA's program. Given the varied risk profiles of the membership, it is the recommendation of MTS that each corridor agency secure coverage for its own operations (as is currently the practice), indemnifying the JPA for corridor agencies' activities relative to LOSSAN. The Board of Directors will maintain Public Entity liability coverage for its general, automobile, errors and omissions and directors' and officers' exposures. A thorough analysis of risk management opportunities and available insurance program designs will be undertaken.

GOVERNMENT AFFAIRS

One of the advantages of assuming local control over the corridor is the ability to advocate on behalf of the corridor in front of state and federal officials. MTS will assist in this endeavor. Government affairs assistance will be provided by Sharon Cooney, Chief of Staff. Cooney has provided strategic and governmental support to the MTS CEO and Board of Directors since 2005, and her experience is detailed in *Task 3*. Additionally, MTS will use its Sacramento-based legislative representative Smith, Watts, and Martinez in efforts to advocate on behalf of LOSSAN. The experience and abilities of Smith, Watts, and Martinez is also presented in *Task 3*.



AUDITOR

MTS will provide the services of Daniel Madzelan, Internal Auditor, to the LOSSAN Board of Directors. Madzelan is a Certified Public Accountant and a Certified Internal Auditor with roughly 12 years of professional audit experience. Madzelan restructured the MTS audit function by implementing a risk-based audit approach and has made significant improvements to contract management and administration operations.

FINANCIAL

The IRMT Finance Manager will coordinate efforts, such as the annual budget and business plan, with MTS finance functions. The MTS Director of Financial Planning and Analysis, supported by the Finance department, will serve as a resource for LOSSAN financial transactions and reporting.

The MTS Finance department is comprised of an experienced and dedicated staff that is responsible for all accounting, financial planning, budgeting, investments, and grant management functions, including federal capital grant administration. That staff currently manages volumes in excess of 30,000 invoices, 10,000 vendor payments, and 40,000 employee paychecks annually. Finance department staff will also incorporate monthly financial reporting for LOSSAN, perform cash management functions, and conduct financial and compliance audits. The MTS Finance department will also provide a Treasurer who will report to the LOSSAN Board of Directors.

Payroll

The MTS Payroll department is responsible for the accurate and timely overall payroll processing for all employees at MTS. The payroll efforts associated with the IRMT will be easily absorbed by the MTS Payroll department, as the IRMT staff additions are equivalent to less than one percent MTS's employees. The department processes bi-weekly payroll for over 1,500 management and union employees in three different payroll groups (MTS Management, MTS Rail, and MTS Bus).

Procurement

The MTS Procurement department is comprised of eleven employees and processes approximately \$80 million in contracts/projects annually. The department will provide a designated procurement specialist to assist IRMT staff, with oversight by Ernesto DeGuzman, the Manager of Procurement. DeGuzman brings significant heavy rail experience, as he previously served as Manager of Contracts Cost Administration for Caltrain. In that role, he exercised procurement control and administration over a \$170-million annual multi-year commuter rail operations, capital maintenance, and construction support contract. Additionally, he directed procurement activities and enforced the terms of the Caltrain contract.

Federal Capital Grant Administration

MTS has familiarity with a variety of federal, state, and local funding sources and will provide the JPA assistance with finding, applying for, and managing grants. At the federal level, MTS receives funding from the FTA, including the following surface transportation programs.

- **Section 5307** - Urban Area Formula Grants for capital improvements and preventative maintenance
- **Section 5311** - Formula Grants for Rural Areas for capital improvements and to supplement operating costs
- **Section 5337** - State of Good Repair Funding for capital improvements and preventative maintenance
- **Section 5339** - Bus and Bus Facilities Funding for capital improvements

The 2012 FTA Triennial Review found no deficiencies in MTS management of the service operations or the administration of the related federal funds.



MTS also receives funding from state and local sources. State sources include State Transit Assistance (STA), Transit Security Grant Program (TSGP) and Proposition 1B funding, while local sources mainly consist of revenues from TransNet (a sales tax passed by San Diego County voters to fund transportation projects).

MTS aggressively pursues competitive funding opportunities and has been awarded discretionary grant funding from the FTA, California Energy Commission and the California Emergency Management Agency (CalEMA). MTS currently manages twenty-one (21) open grants: four administered by the Caltrans, two from the Federal Emergency Management Administration (FEMA), nine by the FTA, five from CalEMA, and one from the Transportation Security Administration.

CAPITAL PROJECT MANAGEMENT

While many of the capital projects in the region are managed by SANDAG, MTS manages a number of capital projects (and, specifically, rail projects) in house. The Trolley Renewal Project is a collaborative effort between MTS and SANDAG with total funding of \$600 million. MTS also managed the acquisition of over \$300 million in rolling stock over the last decade and annually manages rail replacement, grade crossing, substation, and signal projects. The capital project budget varies from year to year, ranging from \$20 million to \$147 million in the last five years. The following table shows the total funding of MTS's Capital Improvement Program per fiscal year (FY10-14), and funding for rail-specific projects, respectively.

Table 2

MTS Rail-Specific CIP Funding
(Fiscal Years 2010-14)

	FY10	FY11	FY12	FY13	FY14	FY15
Total CIP	\$87,144,960	\$20,497,250	\$36,502,440	\$147,199,220	\$42,948,450	\$334,292,320
Rail Specific	\$56,012,070	\$9,872,000	\$5,715,610	\$108,825,440	\$6,645,450	\$187,071,570

MARKETING/PUBLIC INFORMATION OFFICER (PIO)

While the IRMT will have dedicated marketing staff, the MTS marketing team will be available as needed. The MTS marketing team consists of eight professionals with a wide range of expertise, including creative development, advertising production, advertising planning and buying, customer information brochures and signage, cartography, fare media design and production, timetable design and production, media relations, private-public partnerships, and development and implementation of community relations programs.

The MTS Marketing and Communications department recently launched new rail and bus services, introduced new rail and bus vehicles to the marketplace, produced a series of animated television commercials with original songs, developed and implemented a new station timetable and way-finding system, and initiated ridership partnerships with Amtrak, San Diego Chargers, San Diego Padres, Balboa Park, the San Diego Zoo, and the San Diego Symphony, among others. The department has a history of participating in LOSSAN corridor coordination with SANDAG and the Caltrans DOR and it is well-positioned to support the IRMT marketing efforts to increase ridership through the corridor.

PIO duties will be carried out by Rob Schupp, MTS Director of Marketing and Communications, who also serves as the PIO for MTS. Schupp has more than 30 years of marketing experience, including seven at MTS. His PIO experience includes on-camera interviews, emergency planning, media training, message point development, media relations and more. During his tenure at MTS he has responded to most of the events typical of rail operations, including accidents with pedestrians and vehicles, security and safety, employee relations and service interruptions.



HUMAN RESOURCES

The Human Resources department will assist in the hiring of IRMT staff, will provide an orientation, and will be their contact for benefits and other human resources related issues. The MTS Human Resources department is comprised of 12 professionals and currently handles hiring, labor relations, discipline, compensation and benefits for approximately 1,400 employees.

INFORMATION TECHNOLOGY

The Information Technology department will assist in the set-up and maintenance of IRMT staff computers and network administration. MTS's 17-person IT department includes computer support specialists who provide support for nearly 500 users, systems administrators who support nearly 200 servers and enterprise storage, and a network administrator.

RAIL OPERATIONS

MTS has considerable rail operations experience, as it has been operating LRT service for over 30 years. While MTS does not operate intercity rail, the agency works with intercity rail and commuter rail agencies, and owns freight rail tracks. MTS staff (particularly Wayne Terry and Fred Byle – see Task 3) have decades of experience in the operation of heavy rail.

While specific duties will not be assigned to the current MTS Rail operations staff, the full MTS Rail team will be ready to assist the IRMT at any time. In addition to Terry and Byle's experience, MTS rail staff has expertise in track maintenance, station maintenance, vehicle maintenance, transportation, supervision, training, and safety.

CALL CENTER

As an option, MTS is prepared for its existing telephone information center to handle calls in to LOSSAN. BART's telephone information center currently receives calls regarding CCJPA service – mostly related to schedule information and service delays – and MTS is prepared to provide the same service for LOSSAN, if selected as the managing agency.

The telephone system is getting upgraded, giving MTS a more efficient, effective, and customer-responsive system. Consequently, only a minimal staff increase would be required to handle the additional LOSSAN calls. After discussions with BART/CCJPA staff, MTS estimates that it can meet the demands of the corridor with a three-person extension to the current 17-person staff. Consequently, while LOSSAN call volumes may comprise approximately one third of the calls, MTS is prepared to charge only about \$250,000 per year. MTS will also explore, in the future, other options for efficient delivery of this service, including contracting it out.



Facilities

Headquartered in downtown San Diego, MTS has ample dedicated office space within the MTS corporate complex to accommodate IRMT staff. Offices will be provided for at least five IRMT staff (Managing Director, Finance Manager, Planning Manager, Marketing Manager, and Engineering Officer), while cubicles or offices will be assigned to the Executive Assistant/Clerk of the Board, Marketing Assistant, Planning Assistant/Data Analyst and the four positions that will be located mainly off-site: Transportation Manager, Mechanical Manager, Assistant Mechanical Manager, and Mechanical Compliance Officer. Each office will include standard office equipment such as a phone, computer, desk, chair, and bookcases. Additionally, all MTS conference rooms will be available for LOSSAN use. It is estimated that the monthly usage fees for this office space will be \$4,000 per month. The staff will be located in proximity to MTS staff including the CEO, accounting, procurement, marketing, risk management, auditing, planning, and rail operations.

The complex is served with ample parking and is conveniently located for transit users, as it is located at the intersection of all three LRT lines and a number of bus routes, and is a



short Trolley ride away from Santa Fe Depot, the terminus for the Coaster commuter rail service and Pacific Surfliner.

Similar to the interim period, space for all meetings will be made available at MTS. However, at the preference of the Board of Directors, meetings may be held in Los Angeles or other locations. If meetings are hosted at MTS, technology is available to live-stream all Board meetings online.



Task 5: Agency Budget

The annual budget will be the responsibility of the Finance Manager, with the assistance of MTS Finance department staff. During the interim period, the MTS Finance department will determine the budget with the assistance of MTS upper management staff. The budget will be presented for approval to the LOSSAN Board of Directors annually, and staff anticipates no difficulties with meeting an April 1 due date for subsequent budget years.

While the ultimate annual budget development process will be determined by the IRMT's Managing Director and Finance Manager as directed by the LOSSAN Board of Directors, MTS typically develops its budget in the six-month period prior to the next fiscal year. The operating budgets are developed in a bottom-up fashion, as a series of templates are sent to each manager that is responsible for departmental budgets. The templates provide the detail of personnel and non-personnel budget requests for the coming budget year and include historical results, previous budget projections and areas to include additional requests.

Meetings are held with managers, directors, general managers and finance staff at the agency or department level for review and revision. Within these meetings, the budgets are reviewed at the line-item level, as well as at the departmental and divisional level. The CEO reviews the agency and departmental budgets with the finance staff and directs changes as needed. Upon completion, the operating budget is presented to the Board.

At the MTS Board of Directors meetings, three or four finance workshops and/or discussion items are presented informing the Board of progress on the budget as discussed with the Budget Development Committee. One to two months before the beginning of the fiscal year, the final budget is offered at a public hearing for adoption.

During the interim/start-up period, MTS Finance staff will develop the LOSSAN budget, following current MTS budget procedures, with feedback and direction from the LOSSAN Board of Directors. An April 1 timeframe would be met.

Task 6: Key LOSSAN Initiatives

It is recognized by MTS that the desire of the member agencies is to increase ridership and revenue on the corridor, decrease operating costs, improve on-time performance of the Pacific Surfliner, improve service coordination among the corridor agencies, and continue with the capital improvement plan.

MTS strongly supports all of these initiatives and believes that each of these goals goes hand-in-hand with the others. It's difficult to increase revenue if ridership does not increase, and it's difficult to increase ridership if service coordination is lacking, trains are running late, or it takes too long to get from one destination to another. Recognizing that MTS will not be the operator and will not make service-related decisions, it is ready to assist LOSSAN in achieving those goals.

The future managing agency is fortunate in that analyses and assessments of the corridor's strengths and opportunities for improvement have been already explored in a variety of studies over the last few years, including the 2012 LOSSAN Strategic Implementation Plan, the 2010 Strategic Assessment Study, and the 2008 Quick Improvements Study. Those studies reveal the consensus of the member agencies and MTS looks forward



to working with those member agencies to implement the recommendations. The Strategic Implementation Plan identified the following elements that were shared goals of multiple member agencies:

- Desire to utilize the LOSSAN corridor to its full potential, including better coordination of intercity and commuter rail services, transit connectivity, and provide new travel options for under or un-served markets.
- Develop a rail system that minimizes travel times for each service, yet also provides convenient connection points.
- Synchronize arrivals and departures to provide the maximum benefit to passengers.
- Improve on-time statistics for Pacific Surfliner trains.
- Solidify the Rail-2-Rail Program, or a similar program, that offers travel flexibility to passengers.
- Implement electronic fare collection along the corridor which is integrated with all three existing passenger rail providers.
- Coordinate with member agencies and associated transit systems to provide convenient and common ticketing and transfers between modes of transportation.
- Establish a forum of stakeholders for the development of a cohesive business plan that utilizes all modes of transportation.
- Plan and obtain funding and permits for additional double tracking and multiple tracking project to improve operations.

The overarching goals of the Strategic Implementation Plan included the following:

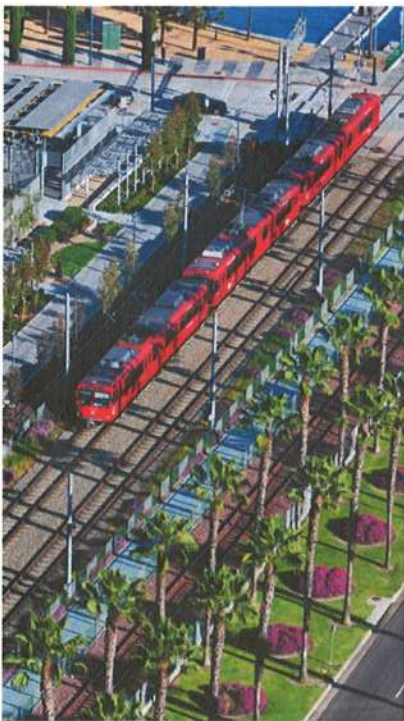
- Collectively provide the infrastructure to allow more peak period trains, faster through-express trains and additional service improvements that meet current and future conventional and high-speed intercity, commuter, and freight demands both north and south of Los Angeles Union Station.
- Integrate regional fare policy and develop common fare media that are based in part on early implementation lessons in the corridor as appropriate (electronic revenue collection).
- Integrate and/or coordinate operations and develop more efficient operating schedules and dispatching for corridor services.
- Implement a strategy for seamless rail travel in the corridor.
- Collaborate to identify and establish new services for un-served and underserved markets.
- Integrate and improve traveler information, standardized to the extent possible.
- Coordinate with long-distance passenger rail and connecting motor coach services.

Again, MTS is fully in support of these goals and looks forward to working with other member agencies on implementing these improvements in its role as host to the IRMT.

In terms of specific recommendations above and beyond what has already been recommended by various studies and endorsed by the LOSSAN Board of Directors, based on its operating experience, the all-encompassing recommendation is to look at the corridor comprehensively.

The LOSSAN Corridor goes through one of the most populated and destination-rich areas of the nation. Business centers, major universities, major league sports venues, world-renowned theme parks, places of historic interest, beach resorts and residential neighborhoods of every demographic are found along the corridor. Connecting to it are modern public transit systems that make much of Southern California accessible to and from the Pacific Surfliner and other corridor services.

Viewing the corridor comprehensively and developing cooperative strategies among all Southern California stakeholders is the key to increasing ridership on the corridor.



This comprehensive approach will be utilized in a number of ways:

- Coordinate connecting services with all Southern California transportation providers to ensure seamless transfers between modes to the greatest extent possible.
- Integrate fare purchasing with all Southern California transportation providers.
- Develop a coordinated marketing effort among all corridor public transit agencies, as well as others in Southern California with connecting services.
- Develop cross-agency mobile ticketing applications for multi-agency/multi-mode access with a single ticket either purchased online or on smart phones.
- Develop strong business-to-business marketing tools to increase Pacific Surfliner's market share of regular, repeat business travelers.
- Develop marketing partnerships with Southern California destinations to add value and encourage train travel to popular venues.
- Develop a website that allows trip planning across all Southern California modes of travel.
- Establish an integrated telephone customer service center (see Task 4).
- Develop methods to enhance on-time performance.
- Upon renewal of the service contract, MTS would encourage on-time performance, customer satisfaction, and service performance measures to be further analyzed and strengthened.

MTS is well suited to assist in the implementation of these strategies:

- It has built its system around timed connections and will endeavor to lend its expertise to the LOSSAN corridor.
- It has instituted many strategies to increase on-time performance, including looking at on-time performance on a station-by-station basis to provide a picture of the true passenger experience. MTS installed AVL devices to track progress in real time and analyzes the schedules by segment, rather than by the entire route, to determine if time needs to be added or subtracted from the schedule.
- In 2006, MTS completed a comprehensive operational analysis of its entire system and developed a market-based strategy to allocate its resources where needed most. A similar effort of analyzing trip origins and destinations could be utilized on the corridor to thoroughly understand the market and to target strategies to improve service, to better serve existing passengers, and provide the best opportunity to attract new riders.
- MTS is about to pilot a smart-phone ticketing system that may be deployed throughout Southern California to enable single fare/multi-mode ticketing.
- MTS manages a call center that handles both MTS and NCTD service territories. MTS will assume its fare collection system's (Compass Card) call center in FY14 and fully integrate the two. It is also exploring ways to enhance its call center efficiency in the private sector. MTS is proposing incorporating LOSSAN into the regional call center if selected as the managing agency.
- The MTS marketing department has initiated many successful co-marketing programs with San Diego area destinations. It participates regularly in APTA and CTA marketing events. It is confident that this expertise will lead to meaningful partnerships with significant Southern California institutions and to the coordination of marketing efforts with all Southern California transit agencies.
- MTS has conducted marketing programs with local businesses to increase the number of choice riders in its system. The EcoPass program presells tens of thousands of tickets to area business. Additionally, its marketing outreach



efforts to businesses to support commuter express bus service have been highly successful. Programs such as these, in combination with the expertise of other transit agencies, will increase the number of repeat business class riders.

- MTS has contracted out nearly half of its bus services and has included liquidated damages clauses for poor performance and customer complaints.

MTS is committed to working with fellow LOSSAN member agencies to accomplish all of these objectives, resulting in enhanced reliability, increased ridership, and greater revenue. Additionally, these strategies will help achieve the following short-term goals already established by the Strategic Implementation Plan:

- New commuter trains between San Diego and Los Angeles, making all stops.
- A new Pacific Surfliner round trip between Ventura and Santa Barbara.
- Additional limited stop Pacific Surfliner trains.
- Additional mid-day Coaster and Metrolink trips with timed connection at Oceanside.
- Better connectivity with San Joaquin corridor and consistent 7-day intercity schedule.

MTS also believes these strategies set a strong foundation to achieve sufficient ridership increases to support the long-term goal of nearly doubling the train trips on the corridor by 2030 (from 151 to 274) and to integrate the corridor with high speed rail.

ADDITIONAL INFORMATION

Conflicts of Interest

There should be no issues with conflicts of interests in the proper use and allocation of state-supported intercity rail funds. The Conflict of Interest Code of MTS requires all Board Members, officials and designated positions within the agency to file statements of economic interests with the MTS General Counsel on an annual basis in compliance with the Political Reform Act (Government Code Sections 81000, et seq.). This Code will be expanded to include Board Members, officials, and designated positions within the managing agency and LOSSAN JPA.

Per MTS Policy 13.1, a consultant is eligible for award of service contracts as long as the contract in question does not create an actual, potential, or apparent conflict of interest. A prohibited conflict of interest exists when a firm is, or may be, unable to render impartial, objective assistance or advice to MTS or where a firm would receive an unfair competitive advantage.

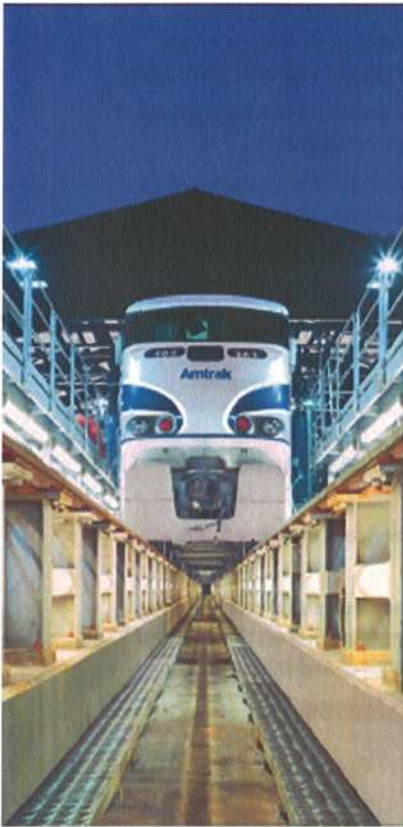
Additionally, as mentioned previously, since MTS does not operate or fund competing operations, MTS will be able to provide a fair and balanced perspective of the corridor. While MTS is knowledgeable and has a stake in the success of the entire corridor, it does not have any competing financial interests.

Exceptions

MTS takes no exceptions to the RFP.

Budget

The total budget for the interim/start-up period is \$1.18 million, based on the assumption that locally-managed intercity rail service would begin on July 1, 2015. Those costs include the negotiation of the ITA, the interim staffing plan, and the hiring and employment of



IRMT staff in preparation for the beginning of service. The Managing Director is anticipated to be hired four months prior to the service start date, with the remainder of the staff hired between one and three months in advance of the beginning of service. Costs include a three percent annual escalation on all wage rates and other direct costs (based on FY13 figures).

The budget for the initial three-year period is \$8.3 million, which includes full-time IRMT staff, shared MTS staff, consultants, and other direct costs. A three-percent escalation rate has been applied to all costs after FY13. The budgets do not include the extra costs associated with the telephone information services, which would be approximately \$250,000 annually (see *Task 4*). It is understood that the budget for the initial period will be subject to negotiations of the ITA with the state.

All salaries were calculated using median personnel costs of similar MTS positions and analysis of comparable CCJPA positions. If a specific MTS employee is named as part of the ITA negotiating team, the interim/start-up team, or as shared staff in support of the IRMT, their current salary was used in place of the mid-point. The salaries for MTS shared staff positions include a 40% benefits/fringe factor plus a 22% overhead rate. The salaries for the full-time IRMT include a 35% benefits/fringe factor (see *Task 4* for benefit details). The reduced benefits/fringe factor is the result of a lower pension level (due to the Public Employees' Pension Reform Act of 2013) and no overhead is applied to IRMT staff because the direct costs should capture all of their overhead.

Assumptions for travel during the initial period are based on the LOSSAN Board of Directors' expressed interest in a stronger advocacy effort and include monthly trips to Sacramento, three trips annually to Washington, DC, and regular travel for meetings within the LOSSAN Corridor. During the interim/start-up period, four monthly trips to Sacramento are planned as well as regular travel to meetings within the LOSSAN Corridor.

The budget also includes the lease of two pool cars dedicated for IRMT staff and agency officials working on LOSSAN business.

The details of the budgets are presented in the attached Program Cost Worksheets.

Glossary of Abbreviations

APTA	American Public Transportation Association	ITOC	SANDAG's Independent Taxpayers Oversight Committee
ASA	Administrative Services Agreement	JPA	Joint Powers Authority
ATSF	Atchison, Topeka and Santa Fe Railway	LOSSAN	Los Angeles-San Diego-San Luis Obispo Rail Corridor
AVL	Automatic Vehicle Location	LRT	Light Rail Transit
BART	Bay Area Rapid Transit	MOU	Memorandum of Understanding
CalEMA	California Emergency Management Agency	MTS	San Diego Metropolitan Transit System
CCJPA	Capitol Corridor Joint Powers Authority	NCTD	North County Transit District
CIP	Capital Improvement Program	NTD	National Transit Database
CPUC	California Public Utilities Commission	OCC	Operations Control Center
CTA	California Transit Association	PIO	Public Information Officer
DOR	Division of Rail (Caltrans)	PIR	Pacific Imperial Railroad, Inc.
FEMA	Federal Emergency Management Agency	SANDAG	San Diego Association of Governments
FRA	Federal Railroad Administration	SD&IV	San Diego & Imperial Valley Railroad
FTA	Federal Transit Administration	SJPA	San Joaquin Joint Powers Authority
GO	General Order (CPUC)	STA	State Transit Assistance (funding)
IRMT	Intercity Rail Management Team	TAC	Technical Advisory Committee (LOSSAN)
ITA	Interagency Transfer Agreement	TSOP	Transit Security Grant Program

Worksheet 1
LOSSAN Managing Agency RFP
Cost Proposal for Start-up Period
 Estimated Timeframe of December 2, 2013 - June 30, 2015

RFP	LOSSAN Managing Agency
Proposing Agency	San Diego Metropolitan Transit System

Combined Overhead for Dedicated LOSSAN Staff (%) =	35.00%
Combined Overhead for Shared Positions (%) =	70.80%
Annual Escalation on Base Hourly Rates =	3.00%

Dedicated LOSSAN Staff													
Name	Classification/Title	Year	Actual Hours**	Share %	Base Rate/Hr			Loaded Rate/Hr***			Labor Amount		
					Min	Mid	Max	Min	Mid	Max	Min	Mid	Max
Staff #1	Managing Director	FY 14		0%	\$ 80.07	\$ 103.99	\$ 127.91	\$108.10	\$140.39	\$172.68	\$0	\$0	\$0
		FY 15	693	33%	\$82.48	\$107.11	\$131.75	\$111.34	\$144.60	\$177.08	\$77,198	\$100,258	\$123,317
			693								\$77,198	\$100,258	\$123,317
Staff #2	Executive Assistant/Clerk of the Board	FY 14		0%	\$ 26.42	\$ 34.30	\$ 42.18	\$35.67	\$46.30	\$56.94	\$0	\$0	\$0
		FY 15	520	25%	\$27.21	\$35.33	\$43.44	\$38.74	\$47.08	\$58.05	\$19,103	\$24,800	\$30,498
			520								\$19,103	\$24,800	\$30,498
Staff #3	Finance Manager	FY 14		0%	\$ 34.64	\$ 44.97	\$ 55.30	\$46.76	\$60.71	\$74.66	\$0	\$0	\$0
		FY 15	347	17%	\$35.68	\$46.32	\$56.96	\$48.17	\$62.53	\$76.90	\$16,697	\$21,677	\$26,657
			347								\$16,697	\$21,677	\$26,657
Staff #4	Manager of Marketing	FY 14		0%	\$ 34.64	\$ 44.97	\$ 55.30	\$46.76	\$60.71	\$74.66	\$0	\$0	\$0
		FY 15	347	17%	\$35.68	\$46.32	\$56.96	\$48.17	\$62.53	\$74.66	\$16,697	\$21,677	\$25,681
			347								\$16,697	\$21,677	\$25,681
Staff #5	Marketing Assistant	FY 14		0%	\$ 17.61	\$ 22.67	\$ 27.52	\$24.04	\$30.60	\$37.15	\$0	\$0	\$0
		FY 15	173	8%	\$18.34	\$23.35	\$28.35	\$24.78	\$31.52	\$38.27	\$4,292	\$5,464	\$6,633
			173								\$4,292	\$5,464	\$6,633
Staff #6	Manager of Planning	FY 14		0%	\$ 34.64	\$ 44.97	\$ 55.30	\$46.76	\$60.71	\$74.66	\$0	\$0	\$0
		FY 15	347	17%	\$35.68	\$46.32	\$56.96	\$48.17	\$62.53	\$76.90	\$16,697	\$21,677	\$26,657
			347								\$16,697	\$21,677	\$26,657
Staff #7	Planning Assistant/Data Analyst	FY 14		0%	\$ 20.56	\$ 26.16	\$ 31.75	\$27.75	\$35.32	\$42.87	\$0	\$0	\$0
		FY 15	173	8%	\$21.18	\$26.95	\$32.71	\$28.59	\$36.38	\$44.16	\$4,955	\$6,306	\$7,654
			173								\$4,955	\$6,306	\$7,654
Staff #8	Transportation Manager	FY 14		0%	\$ 45.41	\$ 58.96	\$ 72.50	\$61.31	\$79.59	\$97.88	\$0	\$0	\$0
		FY 15	347	17%	\$46.78	\$60.73	\$74.66	\$63.15	\$81.98	\$100.81	\$21,891	\$28,420	\$34,949
			347								\$21,891	\$28,420	\$34,949
Staff #9	Mechanical Manager	FY 14		0%	\$ 34.64	\$ 44.97	\$ 55.30	\$46.76	\$60.71	\$74.66	\$0	\$0	\$0
		FY 15	347	17%	\$35.68	\$46.32	\$56.96	\$48.17	\$62.53	\$76.90	\$16,697	\$21,677	\$26,657
			347								\$16,697	\$21,677	\$26,657
Staff #10	Mechanical Assistant Manager	FY 14		0%	\$ 30.25	\$ 39.27	\$ 48.30	\$40.84	\$53.02	\$65.20	\$0	\$0	\$0
		FY 15	173	8%	\$31.18	\$40.45	\$49.75	\$42.06	\$54.61	\$67.16	\$7,291	\$9,466	\$11,640
			173								\$7,291	\$9,466	\$11,640
Staff #11	Mechanical Compliance Officer	FY 14		0%	\$ 30.25	\$ 39.27	\$ 48.30	\$40.84	\$53.02	\$65.20	\$0	\$0	\$0
		FY 15	173	8%	\$31.18	\$40.45	\$49.75	\$42.06	\$54.61	\$67.16	\$7,291	\$9,466	\$11,640
			173								\$7,291	\$9,466	\$11,640
Staff #12	Engineering Officer	FY 14		0%	\$ 45.41	\$ 58.96	\$ 72.50	\$61.31	\$79.59	\$97.88	\$0	\$0	\$0
		FY 15	347	17%	\$46.78	\$60.73	\$74.66	\$63.15	\$81.98	\$100.81	\$21,891	\$28,420	\$34,949
			347								\$21,891	\$28,420	\$34,949
Subtotal, Dedicated Staff				3,987							\$230,702	\$299,308	\$367,132

Shared Staff													
Name	Classification/Title	Year	Actual Hours**	% Share	Base Rate/Hr			Loaded Rate/Hr***			Labor Amount		
					Min	Mid (see note)	Max	Min	Mid (see note)	Max	Min	Mid (see note)	Max
Paul Jablonski Interim Executive Director (CEO)		FY 14	207	15%	\$ 103.00	\$ 160.24	\$ 265.23	\$175.92	\$273.68	\$453.00	\$36,390	\$56,812	\$93,704
		FY 15	312	15%	\$106.00	\$168.04	\$273.18	\$181.20	\$281.90	\$468.50	\$56,535	\$87,981	\$145,577
			519								\$92,925	\$144,593	\$239,281
Karen Landers	Legal / General Counsel	FY 14	138	10%	\$61.71	\$87.18	\$101.89	\$109.40	\$148.87	\$173.89	\$14,534	\$20,529	\$23,952
		FY 15	208	10%	\$63.56	\$89.77	\$104.74	\$108.56	\$153.33	\$178.90	\$22,580	\$31,893	\$37,211
			346								\$37,114	\$52,422	\$61,163
Sharon Cooney	Government Affairs / Chief of Staff	FY 14	138	10%	\$58.09	\$73.07	\$82.45	\$85.81	\$124.80	\$157.91	\$13,212	\$17,210	\$21,716
		FY 15	209	10%	\$57.78	\$75.28	\$85.23	\$88.88	\$126.54	\$162.68	\$20,526	\$26,737	\$33,831
			346								\$33,738	\$43,947	\$55,606
Brent Boyd	Interim Staff / Senior Transportation Planner and Rail Operations Analyst	FY 14	817	38%	\$30.25	\$43.08	\$48.30	\$51.87	\$73.59	\$82.49	\$26,719	\$38,055	\$42,556
		FY 15	780	38%	\$31.18	\$44.38	\$49.75	\$53.22	\$75.80	\$84.97	\$41,511	\$50,121	\$56,273
			1,297								\$68,230	\$87,178	\$108,801
Rebecca Zeit	Interim Staff / Executive Assistant of MTS Rail	FY 14	817	38%	\$20.58	\$28.91	\$31.75	\$36.11	\$51.09	\$54.24	\$18,159	\$26,419	\$28,047
		FY 15	780	38%	\$21.18	\$30.81	\$32.71	\$38.17	\$52.82	\$55.88	\$28,211	\$41,044	\$43,574
			1,297								\$46,369	\$67,463	\$71,822
Nara Lee	Web Site Development / Digital Design & Content Specialist	FY 14	80	5%	\$23.54	\$29.72	\$38.37	\$40.20	\$50.75	\$62.12	\$2,772	\$3,499	\$4,283
		FY 15	104	5%	\$24.24	\$30.61	\$37.46	\$41.40	\$52.26	\$63.96	\$4,306	\$5,437	\$6,654
			173								\$7,078	\$8,938	\$10,937
Rob Schupp	Marketing / Director of Marketing and Communications	FY 14	80	5%	\$51.00	\$72.34	\$84.05	\$87.10	\$123.55	\$143.55	\$8,006	\$9,519	\$9,898
		FY 15	104	5%	\$52.53	\$74.51	\$86.57	\$89.71	\$127.26	\$147.66	\$9,330	\$13,235	\$15,378
			173								\$15,336	\$21,754	\$25,276
MTS Staff	Finance / Finance Manager	FY 14	104	8%	\$34.84	\$44.97	\$55.30	\$59.16	\$78.81	\$94.45	\$6,153	\$7,968	\$9,823
		FY 15	104	5%	\$35.68	\$46.32	\$56.96	\$60.94	\$79.11	\$97.29	\$6,338	\$8,228	\$10,118
			208								\$12,491	\$16,216	\$19,941
MTS Staff	IT Support / Computer Support Specialist	FY 14		0%	\$17.81	\$22.67	\$27.52	\$30.42	\$38.72	\$47.01	\$0	\$0	\$0
		FY 15	96	5%	\$18.34	\$23.35	\$28.35	\$31.33	\$39.88	\$48.42	\$3,008	\$3,829	\$4,648
			96								\$3,008	\$3,829	\$4,648
Jeff Stumbo	HR / Director of HR and Labor Relations	FY 14		0%	\$58.09	\$85.47	\$92.48	\$95.81	\$145.98	\$157.91	\$0	\$0	\$0
		FY 15	104	5%	\$57.78	\$88.03	\$96.23	\$98.68	\$150.38	\$162.65	\$10,263	\$15,638	\$16,915
			104								\$10,263	\$15,638	\$16,915
Kelly Mann	HR / Human Resources Supervisor	FY 14		0%	\$28.42	\$34.98	\$42.18	\$45.12	\$59.71	\$72.04	\$0	\$0	\$0
		FY 15	128	8%	\$27.21	\$38.01	\$43.44	\$44.48	\$61.50	\$74.20	\$5,949	\$7,872	\$9,498
			128								\$5,949	\$7,872	\$9,498
MTS Staff	HR / Human Resources Representative II	FY 14		0%	\$23.54	\$29.95	\$38.37	\$40.20	\$51.16	\$62.12	\$0	\$0	\$0
		FY 15	238	11%	\$24.24	\$30.85	\$37.48	\$41.40	\$52.89	\$63.96	\$9,854	\$12,541	\$15,228
			238								\$9,854	\$12,541	\$15,228
Subtotal, Shared Staff			4,925								\$ 342,366	\$ 482,367	\$ 639,046

*NOTE: "Mid" was replaced by salary figures of current positions.

Other Direct Costs				
Type	Year	Amount	Notes	
Office Space	FY 14	\$0	Four months of office space (\$4,000/month), plus \$3,000/person for furniture and fixtures.	
	FY 15	\$52,480		
		\$52,480		
Travel (mileage, train, other travel)	FY 14	\$21,120	Assumed six train trips to Los Angeles, four round trip flights to Sacramento, four hotel room nights, and eight days of per diem per month, escalated 3% annually.	
	FY 15	\$33,630		
		\$53,750		
Consultant Services (specify)	FY 14	\$95,167	Negotiator @ \$200/hr * 10 hrs per week, eight months FY14, 20 hrs per week, 8 months in FY15 Legal @ \$25,000/year Legislative Representative @ \$250/hr * 10 hrs annually General consultant (Rail Operations, etc.) fees of \$10,000/year if needed All escalated 3% annually	
	FY 15	\$167,118		
		\$262,284		
Other Direct Costs (specify)	FY 14	\$3,333	Telephones/Conference calls, escalated 3% annually, plus \$10,850 in hiring costs (background checks, drug tests, recruitment advertising - for FY15 only).	
	FY 15	\$15,800		
		\$19,133		
Subtotal, Other Direct Costs		\$387,648		

Total Start-up Costs	Min	Mid	Max
Total Start-up FY 14	\$243,564	\$296,451	\$353,781
Total Start-up FY 15	\$717,140	\$880,862	\$1,040,065
Total, Start-up Period	\$960,704	\$1,179,312	\$1,393,826

* Includes Labor Overhead, Fringe Benefit and General Administrative Expenses (% of Total Direct Labor Cost)

** For calculating purposes, 2080 hours per year equals a full time staff position. In FY14, the Start-up Period will begin on 11/1 therefore the maximum annual hours in FY 14 will be 1379

*** Loaded Hourly Rate Calculation: \$ Actual Hourly Rate X (1 + Combined of Overhead&Fringe%) x escalation rate (1.03 escalation %)

Paul Jablonski / Chief Executive Officer

Name/Title of Authorized Representative

Signature

Date

Worksheet 2
LOSSAN Managing Agency RFP
Cost Proposal for Initial Period under ITA
 Estimated Timeframe of July 1, 2015 - June 30, 2018

RFP	LOSSAN Managing Agency
Proposing Agency	San Diego Metropolitan Transit System

Combined Overhead for Dedicated LOSSAN Staff (%) = 35.00%

Combined Overhead for Shared Positions (%) = 70.00%

Annual Escalation of Rate/Hr (%) = 3.00%

Dedicated LOSSAN Staff													
Name	Classification/Title	Year	Actual Hours**	Share %	Base Rate/Hr			Loaded Rate/Hr***			Labor Amount		
					Min	Mid	Max	Min	Mid	Max	Min	Mid	Max
Staff #1	Managing Director	FY 16	2,080	100%	\$84.95	\$110.33	\$135.70	\$114.68	\$148.94	\$183.20	\$238,543	\$309,797	\$381,050
		FY 17	2,080	100%	\$87.50	\$113.84	\$139.77	\$118.12	\$153.41	\$188.69	\$245,700	\$319,090	\$392,481
		FY 18	2,080	100%	\$90.12	\$117.05	\$143.97	\$121.87	\$158.01	\$194.35	\$253,071	\$328,663	\$404,256
			6,240								\$737,314	\$957,550	\$1,177,787
Staff #2	Executive Assistant/Clerk of Board	FY 16	2,080	100%	\$28.03	\$38.39	\$44.75	\$37.84	\$49.12	\$60.41	\$78,704	\$102,177	\$125,850
		FY 17	2,080	100%	\$28.87	\$37.48	\$48.09	\$38.97	\$50.60	\$62.22	\$81,065	\$105,242	\$129,420
		FY 18	2,080	100%	\$29.74	\$38.80	\$47.47	\$40.14	\$52.12	\$64.09	\$83,497	\$108,400	\$133,302
			6,240								\$243,266	\$315,819	\$388,372
Staff #3	Finance Manager	FY 16	2,080	100%	\$36.75	\$47.71	\$58.87	\$49.61	\$64.41	\$79.20	\$103,190	\$133,965	\$164,741
		FY 17	2,080	100%	\$37.85	\$49.14	\$60.43	\$51.10	\$66.34	\$81.58	\$106,285	\$137,984	\$169,683
		FY 18	2,080	100%	\$38.99	\$50.61	\$62.24	\$52.63	\$68.33	\$84.03	\$109,474	\$142,124	\$174,774
			6,240								\$318,949	\$414,074	\$509,199
Staff #4	Manager of Marketing	FY 16	2,080	100%	\$36.75	\$47.71	\$58.87	\$49.61	\$64.41	\$79.20	\$103,190	\$133,965	\$164,741
		FY 17	2,080	100%	\$37.85	\$49.14	\$60.43	\$51.10	\$66.34	\$81.58	\$106,285	\$137,984	\$169,683
		FY 18	2,080	100%	\$38.99	\$50.61	\$60.43	\$52.63	\$68.33	\$81.58	\$109,474	\$142,124	\$169,683
			6,240								\$318,949	\$414,074	\$494,367
Staff #5	Marketing Assistant	FY 16	2,080	100%	\$18.89	\$24.05	\$29.20	\$25.51	\$32.47	\$39.42	\$50,552	\$67,535	\$81,987
		FY 17	2,080	100%	\$19.48	\$24.77	\$30.07	\$26.27	\$33.44	\$40.60	\$54,644	\$69,561	\$84,447
		FY 18	2,080	100%	\$20.04	\$25.52	\$30.98	\$27.06	\$34.45	\$41.82	\$56,283	\$71,648	\$86,980
			6,240								\$163,979	\$208,744	\$253,414
Staff #6	Manager of Planning	FY 16	2,080	100%	\$36.75	\$47.71	\$58.87	\$49.61	\$64.41	\$79.20	\$103,190	\$133,965	\$164,741
		FY 17	2,080	100%	\$37.85	\$49.14	\$60.43	\$51.10	\$66.34	\$81.58	\$106,285	\$137,984	\$169,683
		FY 18	2,080	100%	\$38.99	\$50.61	\$62.24	\$52.63	\$68.33	\$84.03	\$109,474	\$142,124	\$174,774
			6,240								\$318,949	\$414,074	\$509,199
Staff #7	Planning Assistant/Data Analyst	FY 16	2,080	100%	\$21.81	\$27.78	\$33.88	\$29.44	\$37.47	\$45.48	\$61,245	\$77,937	\$94,598
		FY 17	2,080	100%	\$22.47	\$28.59	\$34.70	\$30.33	\$38.59	\$46.84	\$63,082	\$80,275	\$97,436
		FY 18	2,080	100%	\$23.14	\$29.45	\$35.74	\$31.24	\$39.75	\$48.25	\$64,975	\$82,683	\$100,359
			6,240								\$199,302	\$240,895	\$292,393
Staff #8	Transportation Manager	FY 16	2,080	100%	\$48.18	\$62.55	\$78.92	\$65.04	\$84.44	\$103.84	\$135,285	\$175,534	\$215,983
		FY 17	2,080	100%	\$49.62	\$64.42	\$79.22	\$66.99	\$86.97	\$106.95	\$139,343	\$180,903	\$222,483
		FY 18	2,080	100%	\$51.11	\$66.36	\$81.60	\$69.00	\$89.58	\$110.18	\$143,524	\$186,330	\$229,136
			6,240								\$418,152	\$542,867	\$667,582
Staff #9	Mechanical Manager	FY 16	2,080	100%	\$36.75	\$47.71	\$58.87	\$49.61	\$64.41	\$79.20	\$103,190	\$133,965	\$164,741
		FY 17	2,080	100%	\$37.85	\$49.14	\$60.43	\$51.10	\$66.34	\$81.58	\$106,285	\$137,984	\$169,683
		FY 18	2,080	100%	\$38.99	\$50.61	\$62.24	\$52.63	\$68.33	\$84.03	\$109,474	\$142,124	\$174,774
			6,240								\$318,949	\$414,074	\$509,199
Staff #10	Mechanical Assistant Manager	FY 16	2,080	100%	\$32.09	\$41.67	\$51.24	\$43.33	\$56.25	\$69.17	\$90,118	\$116,997	\$143,876
		FY 17	2,080	100%	\$33.08	\$42.92	\$52.78	\$44.63	\$57.94	\$71.25	\$92,822	\$120,507	\$148,193
		FY 18	2,080	100%	\$34.05	\$44.20	\$54.36	\$45.96	\$59.67	\$73.38	\$95,606	\$124,122	\$152,638
			6,240								\$278,546	\$361,627	\$444,707
Staff #11	Mechanical Compliance Officer	FY 16	2,080	100%	\$32.09	\$41.67	\$51.24	\$43.33	\$56.25	\$69.17	\$90,118	\$116,997	\$143,876
		FY 17	2,080	100%	\$33.08	\$42.92	\$52.78	\$44.63	\$57.94	\$71.25	\$92,822	\$120,507	\$148,193
		FY 18	2,080	100%	\$34.05	\$44.20	\$54.36	\$45.96	\$59.67	\$73.38	\$95,606	\$124,122	\$152,638
			6,240								\$278,546	\$361,627	\$444,707
Staff #12	Engineering Officer	FY 16	2,080	100%	\$48.18	\$62.55	\$78.92	\$65.04	\$84.44	\$103.84	\$135,285	\$175,534	\$215,983
		FY 17	2,080	100%	\$49.62	\$64.42	\$79.22	\$66.99	\$86.97	\$106.95	\$139,343	\$180,903	\$222,483
		FY 18	2,080	100%	\$51.11	\$66.36	\$81.60	\$69.00	\$89.58	\$110.18	\$143,524	\$186,330	\$229,136
			6,240								\$418,152	\$542,867	\$667,582
Subtotal, Dedicated Staff			74,880								\$4,003,051	\$5,188,289	\$6,358,507

Shared Staff													
Name	Classification/Title	Year	Actual Hours**	% Share	Base Rate/Hr			Loaded Rate/Hr***			Labor Amount		
					Min	Mid	Max	Min	Mid	Max	Min	Mid	Max
Paul Jablonicki	Chief Executive Officer	FY 16	104	5%	\$109.27	\$170.00	\$281.38	\$186.64	\$290.35	\$480.59	\$19,410	\$30,197	\$49,982
		FY 17	104	5%	\$112.55	\$175.10	\$289.82	\$192.24	\$299.06	\$495.01	\$19,993	\$31,103	\$51,481
		FY 18	104	5%	\$115.93	\$180.35	\$298.51	\$198.00	\$308.03	\$509.86	\$20,592	\$32,036	\$53,025
			312									\$59,995	\$93,335
Karen Lenders	Legal / General Counsel	FY 16	208	10%	\$85.47	\$92.47	\$107.88	\$111.81	\$157.93	\$184.27	\$23,257	\$32,850	\$38,328
		FY 17	208	10%	\$87.43	\$95.24	\$111.12	\$115.17	\$162.67	\$190.80	\$23,955	\$33,836	\$39,477
		FY 18	208	10%	\$89.45	\$98.10	\$114.46	\$118.62	\$167.55	\$195.49	\$24,674	\$34,851	\$40,662
			624									\$71,886	\$101,536
Sharon Cooney	Government Affairs / Chief of Staff	FY 16	208	10%	\$59.51	\$77.52	\$98.08	\$101.64	\$132.40	\$167.53	\$21,142	\$27,539	\$34,845
		FY 17	208	10%	\$61.30	\$79.84	\$101.03	\$104.69	\$138.37	\$172.56	\$21,778	\$28,366	\$35,891
		FY 18	208	10%	\$63.13	\$82.24	\$104.06	\$107.83	\$140.46	\$177.73	\$22,429	\$29,217	\$36,968
			624									\$65,347	\$85,121
Susan Lockwood	Risk Management / Manager of Risk & Claims	FY 16	416	20%	\$35.68	\$48.11	\$58.88	\$60.94	\$82.17	\$97.20	\$25,350	\$34,185	\$40,471
		FY 17	416	20%	\$36.75	\$49.58	\$58.87	\$62.77	\$84.84	\$100.21	\$26,111	\$35,210	\$41,688
		FY 18	416	20%	\$37.85	\$51.04	\$60.43	\$64.85	\$87.18	\$103.21	\$26,894	\$36,297	\$42,936
			1,248									\$78,355	\$105,662
Daniel Madzelan	Auditor	FY 16	208	10%	\$35.68	\$48.11	\$58.88	\$60.94	\$82.17	\$97.20	\$12,873	\$18,085	\$20,236
		FY 17	208	10%	\$36.75	\$49.58	\$58.87	\$62.77	\$84.84	\$100.21	\$13,055	\$18,638	\$20,843
		FY 18	208	10%	\$37.85	\$51.04	\$60.43	\$64.85	\$87.29	\$103.21	\$13,447	\$19,197	\$21,468
			624									\$39,178	\$55,930
Tom Lynch	Treasurer / Controller	FY 16	208	10%	\$48.78	\$61.98	\$74.68	\$79.89	\$105.88	\$127.55	\$16,618	\$22,018	\$26,530
		FY 17	208	10%	\$48.18	\$63.84	\$76.92	\$82.29	\$109.03	\$131.37	\$17,116	\$22,679	\$27,326
		FY 18	208	10%	\$49.82	\$65.75	\$79.22	\$84.76	\$112.30	\$135.32	\$17,630	\$23,359	\$28,146
			624									\$51,363	\$68,057

Shared Staff														
Name	Classification/Title	Year	Actual Hours**	% Share	Base Rate/Hr			Loaded Rate/Hr***			Labor Amount			
					Min	Mid	Max	Min	Mid	Max	Min	Mid	Max	
Larry Marlowe	Finance / Director of Financial Planning & Analysis	FY 16	208	10%	\$46.78	\$53.61	\$74.68	\$79.89	\$91.58	\$127.55	\$16,818	\$19,045	\$26,530	
		FY 17	208	10%	\$48.18	\$55.22	\$78.92	\$82.29	\$94.31	\$131.37	\$17,116	\$19,616	\$27,326	
		FY 18	208	10%	\$48.82	\$56.87	\$79.22	\$84.76	\$97.14	\$135.32	\$17,630	\$20,205	\$28,146	
			624									\$51,363	\$58,865	\$82,001
			208									\$16,818	\$19,045	\$26,530
Emelio DeGuzman	Procurement / Procurement Manager	FY 16	208	10%	\$46.78	\$61.21	\$74.68	\$79.89	\$104.55	\$127.55	\$17,116	\$22,400	\$27,326	
		FY 17	208	10%	\$48.18	\$63.05	\$78.92	\$82.29	\$107.69	\$131.37	\$17,630	\$23,072	\$28,146	
		FY 18	208	10%	\$49.62	\$64.94	\$79.22	\$84.76	\$110.92	\$135.32	\$17,630	\$23,072	\$28,146	
			624									\$51,363	\$67,218	\$82,001
			1,580									\$72,506	\$94,131	\$115,755
MTS Staff	Procurement / Procurement Specialist	FY 16	1,580	75%	\$27.21	\$35.33	\$43.44	\$46.48	\$60.34	\$74.20	\$74,681	\$96,955	\$119,228	
		FY 17	1,580	75%	\$28.03	\$36.39	\$44.75	\$47.87	\$62.15	\$76.43	\$76,922	\$98,863	\$122,805	
		FY 18	1,580	75%	\$28.87	\$37.48	\$48.09	\$49.31	\$64.01	\$78.72	\$76,922	\$98,863	\$122,805	
			4,680									\$224,109	\$290,948	\$357,788
			1,580									\$72,506	\$94,131	\$115,755
Nancy Dell	Grants / Grants Administrator	FY 16	624	30%	\$27.21	\$36.67	\$43.44	\$46.48	\$60.39	\$74.20	\$29,002	\$41,429	\$48,302	
		FY 17	624	30%	\$28.03	\$40.04	\$44.75	\$47.87	\$60.38	\$76.43	\$29,672	\$42,672	\$47,691	
		FY 18	624	30%	\$28.87	\$41.24	\$46.09	\$48.31	\$70.44	\$78.72	\$30,769	\$43,952	\$49,122	
			1,872									\$89,944	\$128,052	\$143,115
			208									\$6,517	\$8,298	\$10,071
MTS Staff	Payroll / Payroll Coordinator	FY 16	208	10%	\$18.34	\$23.35	\$28.35	\$31.33	\$39.88	\$48.42	\$6,712	\$8,544	\$10,373	
		FY 17	208	10%	\$18.89	\$24.05	\$29.20	\$32.27	\$41.08	\$49.87	\$6,712	\$8,544	\$10,373	
		FY 18	208	10%	\$19.48	\$24.77	\$30.07	\$33.24	\$42.31	\$51.37	\$6,913	\$8,801	\$10,684	
			624									\$20,142	\$25,641	\$31,128
			1,580									\$42,514	\$54,104	\$65,665
MTS Staff	Accounting / Accounting Assistant	FY 16	1,580	75%	\$18.98	\$20.31	\$24.64	\$27.25	\$34.66	\$42.09	\$43,790	\$55,727	\$67,635	
		FY 17	1,580	75%	\$19.43	\$20.91	\$25.38	\$28.07	\$35.72	\$43.36	\$43,790	\$55,727	\$67,635	
		FY 18	1,580	75%	\$19.93	\$21.54	\$26.15	\$28.91	\$36.79	\$44.66	\$45,103	\$57,399	\$69,664	
			4,680									\$131,407	\$167,230	\$202,965
			208									\$19,220	\$27,284	\$31,878
Rob Schupp	Public Information Officer	FY 16	208	10%	\$54.10	\$76.74	\$89.17	\$92.40	\$131.08	\$152.30	\$19,220	\$27,284	\$31,878	
		FY 17	208	10%	\$55.72	\$79.04	\$91.84	\$95.18	\$135.01	\$156.87	\$19,797	\$28,082	\$32,826	
		FY 18	208	10%	\$57.40	\$81.42	\$94.60	\$98.03	\$139.06	\$161.57	\$20,391	\$28,924	\$33,607	
			624									\$59,407	\$84,270	\$97,912
			104									\$4,435	\$5,800	\$6,854
Nara Lee	Website Development / Digital Design & Content Specialist	FY 16	104	5%	\$34.97	\$31.53	\$38.58	\$42.65	\$53.84	\$65.90	\$4,568	\$5,768	\$7,059	
		FY 17	104	5%	\$35.72	\$32.47	\$39.74	\$43.93	\$55.46	\$67.88	\$4,705	\$5,941	\$7,271	
		FY 18	104	5%	\$36.49	\$33.45	\$40.93	\$45.24	\$57.12	\$69.92	\$4,705	\$5,941	\$7,271	
			312									\$13,709	\$17,309	\$21,184
			624									\$25,836	\$32,891	\$39,925
MTS Staff	Graphics / Communications Designer II	FY 16	624	30%	\$24.24	\$30.85	\$37.48	\$41.40	\$52.69	\$63.98	\$26,612	\$33,867	\$41,123	
		FY 17	624	30%	\$24.97	\$31.78	\$38.58	\$42.65	\$54.27	\$65.90	\$27,410	\$34,893	\$42,356	
		FY 18	624	30%	\$25.72	\$32.73	\$39.74	\$43.93	\$55.90	\$67.88	\$27,410	\$34,893	\$42,356	
			1,872									\$79,858	\$101,631	\$123,404
			208									\$6,712	\$8,544	\$10,373
MTS Staff	IT Support / Computer Support Specialist	FY 16	208	10%	\$18.89	\$24.05	\$29.20	\$32.27	\$41.08	\$49.87	\$6,913	\$8,801	\$10,684	
		FY 17	208	10%	\$19.48	\$24.77	\$30.07	\$33.24	\$42.31	\$51.37	\$7,121	\$9,065	\$11,005	
		FY 18	208	10%	\$20.04	\$25.52	\$30.98	\$34.23	\$43.58	\$52.91	\$7,121	\$9,065	\$11,005	
			624									\$20,746	\$26,410	\$32,062
			208									\$8,871	\$11,289	\$13,708
MTS Staff	HR / HR Representative II	FY 16	208	10%	\$24.97	\$31.78	\$38.58	\$42.65	\$54.27	\$65.90	\$9,137	\$11,628	\$14,119	
		FY 17	208	10%	\$25.72	\$32.73	\$39.74	\$43.93	\$55.90	\$67.88	\$9,411	\$11,977	\$14,542	
		FY 18	208	10%	\$26.49	\$33.71	\$40.93	\$45.24	\$57.58	\$69.92	\$9,411	\$11,977	\$14,542	
			624									\$27,418	\$34,893	\$42,369
			624									\$14,790	\$18,815	\$22,840
MTS Staff	Administrative / Office Clerk II	FY 16	624	30%	\$13.88	\$17.66	\$21.43	\$23.70	\$30.15	\$36.60	\$15,233	\$19,378	\$23,525	
		FY 17	624	30%	\$14.29	\$18.18	\$22.07	\$24.41	\$31.06	\$37.70	\$15,233	\$19,378	\$23,525	
		FY 18	624	30%	\$14.72	\$18.73	\$22.74	\$25.14	\$31.99	\$38.53	\$15,690	\$19,961	\$24,231	
			1,872									\$45,713	\$58,155	\$70,597
			23,088									\$1,181,004	\$1,570,263	\$1,936,827

Other Direct Costs			
Type	Year	Amount	Notes
Office Space	FY 16	\$50,923	
	FY 17	\$52,451	
	FY 18	\$54,024	\$4,000/month rent (in FY14 value), escalated 3% annually.
		\$157,399	
Travel (mileage, train, other travel)	FY 16	\$54,361	
	FY 17	\$55,991	Assumed four train trips to LA/month, one flight to Sacramento per month, three flights to DC annually, 6 hotel room nights per month, 16 days of per diem per month, and 1,000 miles of driving per month, escalated 3% annually.
	FY 18	\$57,571	
		\$168,023	
Consultant Services (specify)	FY 16	\$363,677	
	FY 17	\$374,587	16 hours per week of legal assistance (\$400/hr), with 3% annual escalation rate. \$10,000 per year in legislative advocacy, escalated 3% annually.
	FY 18	\$385,924	
		\$1,124,088	
Other Direct Costs (specify)	FY 16	\$20,369	
	FY 17	\$20,980	Two vehicles at \$7,100/each annually for leasing, maintenance, and insurance; conference calls (\$5,000/yr); escalated 3% annually.
	FY 18	\$21,610	
		\$62,959	
Subtotal, Other Direct Costs		\$1,512,469	

Total Initial Period Costs	Min	Mid	Max
Total FY 16	\$2,166,529	\$2,675,826	\$3,173,122
Total FY 17	\$2,231,525	\$2,756,204	\$3,268,315
Total FY 18	\$2,298,470	\$2,838,890	\$3,366,365
Total, Initial Period	\$6,696,523	\$8,271,020	\$9,807,802

OPTIONAL: Telephone Information Staff at an additional \$248,664 for first year (FY16), with 3% escalation rate.

* Includes Labor Overhead, Fringe Benefits and General Administrative Expenses (% of Total Direct Labor Cost)

** For calculating purposes, 2080 hours per year equals a full time staff position.

*** Loaded Hourly Rate Calculation: \$ Actual Hourly Rate X (1 + Combined of Overhead & Fringe%) x escalation rate (1 + escalation %)

Paul Jablonski / Chief Executive Officer

Name/Title of Authorized Representative

Signature



Date

6/14/13

Worksheet 3
LOSSAN Managing Agency RFP
Cost Proposal Summary

RFP	LOSSAN Managing Agency
Proposing Agency	San Diego Metropolitan Transit System

Cost Proposal for Start-up Period		Min	Mid	Max
Estimated Timeframe of November 1, 2013 June 30, 2015	Managing Agency Dedicated Staff	\$230,702	\$299,308	\$367,132
	Managing Agency Shared Staff	\$342,355	\$492,357	\$639,046
	Managing Agency Other Direct Cost	\$387,648	\$387,648	\$387,648
	Managing Agency Start-up Cost	\$960,704	\$1,179,312	\$1,393,826
Managing Agency Initial Period under ITA July 1, 2015 - June 30, 2018	Managing Agency Dedicated Staff	\$4,003,051	\$5,188,289	\$6,358,507
	Managing Agency Shared Staff	\$1,181,004	\$1,570,263	\$1,936,827
	Managing Agency Other Direct Cost	\$1,512,469	\$1,512,469	\$1,512,469
	Managing Agency Initial Period Cost	\$6,696,523	\$8,271,020	\$9,807,802
MANAGING AGENCY TOTAL COST		\$7,657,228	\$9,450,333	\$11,201,628

Annual Costs	Year	Min	Mid	Max
Managing Agency Start-up Cost	FY 14	\$243,564	\$298,451	\$353,761
	FY 15	\$717,140	\$880,862	\$1,040,065
Managing Agency Initial Period under ITA	FY 16	\$2,166,529	\$2,675,926	\$3,173,122
	FY 17	\$2,231,525	\$2,756,204	\$3,268,315
	FY 18	\$2,298,470	\$2,838,890	\$3,366,365
Total		\$7,657,228	\$9,450,333	\$11,201,628

Paul Jablonski / Chief Executive Officer

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Signature

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