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Bob Emery  
**Metropolitan Transit System**

Judy Ritter, *Chair*  
**North San Diego County Transit Development Board**

Terry Johnson  
**San Diego County Regional Airport Authority**

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(Representing **North County Inland**)

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*Councilmember, Santee*  
(Representing **East County**)

Jerry Rindone  
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(Representing **South Bay**)

Dianne Jacob/Bill Horn  
*Supervisor, County of San Diego*

Leon Williams, *Chair*  
**Metropolitan Transit System**

Jack Feller/Dave Druker  
**North San Diego County Transit Development Board**

Mary Sessom  
**San Diego County Regional Airport Authority**

## Advisory Members

Pedro Orso-Delgado  
*District Director, District 11*  
**California Department of Transportation**

Bille Figge  
*Deputy District Director, District 11*  
**California Department of Transportation**

Gary L. Gallegos  
*Executive Director, SANDAG*



# TRANSPORTATION COMMITTEE AGENDA

Friday, April 2, 2004  
9 a.m. – 12 Noon  
SANDAG Board Room  
401 B Street, 7<sup>th</sup> Floor  
San Diego, CA 92101-4231

## AGENDA HIGHLIGHTS

- TRANSIT FIRST SHOWCASE PROJECT
- LOSSAN OVERVIEW
- FRAMEWORK FOR TRANSIT SERVICE PLANNING

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

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# TRANSPORTATION COMMITTEE AGENDA

Friday, April 2, 2004

ITEM #	RECOMMENDATION
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1. PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS	
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Members of the public will have the opportunity to address the Transportation Committee on any issue within the jurisdiction of the Committee. Speakers are limited to three minutes each. Committee members also may provide information and announcements under this agenda item.

### CONSENT ITEM

- |  |         |
|--|---------|
| + 2. MASTER MEMORANDUM OF UNDERSTANDING (MOU) WITH THE NORTH COUNTY TRANSIT DISTRICT (NCTD), THE METROPOLITAN TRANSIT SYSTEM (MTS), AND SANDAG BOARD POLICY ON ASSET OWNERSHIP AND DISPOSITION (Julie Wiley) | APPROVE |
|--|---------|

An MOU between SANDAG, NCTD, and MTS is proposed that is intended to establish a central document that includes the current and future agreements between the agencies. The first proposed supplement to the MOU concerns an agreement among the parties regarding ownership of real and personal property. A related Board policy is also proposed concerning ownership and disposal of real and personal property assets. The Transportation Committee is asked to recommend approval of the MOU and the proposed Board Policy to the Board.

### REPORTS

- |   |         |
|---|---------|
| + 3. REGIONAL TRANSIT SERVICE PLANNING AND EVALUATION POLICY FRAMEWORK (Conan Cheung) | APPROVE |
|---|---------|

Under SB 1703 and the Initial Transition Plan for agency consolidation, SANDAG is responsible for adopting Transit Service Planning and Fare-Setting policies. In June 2003, the Transportation Committee heard an initial discussion regarding the policies and referred the development of proposed policies to the Joint Committee on Regional Transit (JCRT). The initial JCRT recommendation to the Transportation Committee, included in this report, would: (1) approve the framework for use in developing a transit service planning policy; (2) approve the use of the service evaluation methodology as a demonstration of the policy process as it might be applied for evaluating new and existing service proposals during the FY 2005 budget development process; (3) receive information on the framework for developing a fare-setting policy; and (4) request that SANDAG staff return to the JCRT and Transportation Committee in May/June 2004 with an evaluation of the application of the service planning framework and demonstration as outlined in this report.

**+ 4. UPDATE ON TRANSIT FIRST SHOWCASE PROJECT (Miriam Kirshner) APPROVE**

The Showcase Bus Rapid Transit (BRT) Project has been under development for more than a year. The Showcase Project would connect downtown San Diego with San Diego State University travelling primarily along El Cajon and Park Boulevards. This status report includes the following recommendations related to the Showcase Project development: (1) support the concept of a transit lane along Park Boulevard through Balboa Park; (2) authorize preparation of a work scope to conduct a Mid-City Transit Network Plan at a cost of approximately \$75,000 funded from the Showcase Project budget; (3) direct staff to pursue a Peer Review of industry experts to evaluate and provide input to the Showcase Project and Network Plan; and (4) defer further work on the Showcase Project pending the completion of the Network Plan and Peer Review.

**+ 5. UPDATE TO MEMBER AGENCIES FROM THE LOS ANGELES – SAN DIEGO – SAN LUIS OBISPO RAIL CORRIDOR AGENCY (LOSSAN) (Joe Kellejian, SANDAG Representative to LOSSAN Board of Directors; Warren Weber, Caltrans Division of Rail; Liz O'Donoghue, Amtrak; Linda Culp, SANDAG) SUPPORT**

Since 1989, the Los Angeles-San Diego-San Luis Obispo (LOSSAN) Rail Corridor Agency has advocated to increase ridership, revenue, capacity, reliability, and safety on the coastal rail line from San Diego to Los Angeles to San Luis Obispo. Known as Amtrak's Pacific Surfliner corridor, it is the second busiest intercity passenger rail corridor nationwide and Amtrak's fastest growing despite sharing the corridor with freight, Coaster, and Metrolink commuter rail operations. SANDAG provides staff support to the agency. LOSSAN representatives will provide an overview of the LOSSAN corridor and the contributions of LOSSAN and our fellow member agencies in maintaining and improving this rail corridor.

**6. UPCOMING MEETINGS INFORMATION**

The next two Transportation Committee meetings are scheduled for Friday, April 16, 2004, and Friday, May 7, 2004.

**7. ADJOURNMENT**

+ next to an agenda item indicates an attachment

# TRANSPORTATION COMMITTEE

April 2, 2004

AGENDA ITEM NO.: **2**

**Action Requested: APPROVE**

MASTER MEMORANDUM OF UNDERSTANDING (MOU)  
WITH THE NORTH COUNTY TRANSIT DISTRICT (NCTD),  
THE METROPOLITAN TRANSIT SYSTEM (MTS),  
AND SANDAG BOARD POLICY ON ASSET OWNERSHIP  
AND DISPOSITION

## **Introduction**

An MOU between SANDAG, NCTD, and MTS is proposed that is intended to establish a central document that includes the current and future agreements between the agencies. The first proposed supplement to the MOU concerns an agreement among the parties regarding ownership of real and personal property. A related Board policy is also proposed concerning ownership and disposal of real and personal property assets.

## **Recommendation**

It is recommended that the Transportation Committee recommend approval by the SANDAG Board of Directors of the Master MOU between SANDAG, NCTD, and MTS, and the related proposed Board Policy concerning Asset Disposal in substantially the same format as attached hereto.

## **Discussion**

Because the Master MOU (Attachment 1) and proposed Board Policy No. 28 (Attachment 2) concern ownership and disposition of real property and it is the Transportation Committee that will make decisions or recommendations concerning real property on behalf of the Board, the MOU and Policy are being brought to the Transportation Committee first for review.

The purpose of the Master MOU is to provide a document that will serve as the main agreement among SANDAG, NCTD, and MTS following the consolidation of functions under Senate Bill 1703, as amended by Assembly Bill 361. For ease of reference, the Initial and Subsequent Transition Plans are incorporated into the MOU. As issues arise that would benefit from documentation of an agreement among the parties, the MOU will be supplemented. The first proposed supplement describes the parties' agreements concerning ownership of property. Generally, the parties have agreed that so long as the federal grantor agency is in agreement, property purchased by SANDAG as grantee that will be used for operational purposes will be transferred to the relevant operator. This arrangement will usually make most sense from a liability and maintenance standpoint. Additionally, all property currently owned by the operating agencies will remain with those agencies.

The purpose of the Board Policy concerning asset ownership and disposal is to provide the property ownership provisions of the Master MOU in a written form and to provide a methodology for disposing of surplus or obsolete property via competitive or negotiated sale, or other means that are deemed in the best interest of SANDAG. The policy applies to all property, including real property. It gives the Transportation Committee authority to decide when a negotiated sale should be used for assets with a value in excess of \$100,000. The Executive Director is vested with authority to determine the method of sale for assets with an individual or aggregate value of less than \$100,000.

JULIE D. WILEY  
Deputy General Counsel

#### Attachments

Key Staff Contact: Julie D. Wiley, (619) 699-6966; [jwi@sandag.org](mailto:jwi@sandag.org)

Attachment 1 to this Agenda Item is available in card copy only and may be obtained by contacting SANDAG's Clerk of the Board at (619) 699-1912.

Attachment 2 is attached.



## **ASSET OWNERSHIP AND DISPOSITION**

### **Purpose**

This policy establishes guidelines and procedures for the ownership and disposal of SANDAG assets.

### **1. OWNERSHIP OF ASSETS**

1.1 SANDAG, North San Diego County Transit Development Board ("NCTD"), and the Metropolitan Transit Development Board, a California Public Agency operating the Metropolitan Transit System ("MTS"), are parties to a Master Memorandum of Understanding (MOU), which among other things, describes the manner in which acquired real property and personal property will be owned and managed by the three agencies. This policy is consistent with the terms of the Master MOU.

### **1.2 Real Property**

1.2.1 Real property currently owned by NCTD and MTS ("Pre-Owned Property") will be retained by NCTD and MTS.

1.2.2 When SANDAG constructs physical improvements on Pre-Owned Property, the Real Property, including the improvements constructed by SANDAG, will be owned by NCTD and MTS, unless otherwise agreed to in writing by the parties.

1.2.2.1 To enable SANDAG to construct improvements on Pre-Owned Property, the Parties will enter into addenda to the Master MOU for each project that will set forth the legal rights and remedies between or among SANDAG and the affected operating agency(ies) ("Affected Parties") to enable SANDAG to construct the project and the operating agency to continue necessary operations during construction.

1.2.2.2 To convey improvements developed on Pre-Owned Property to NCTD and MTS, the Affected Parties will enter into addenda to the Master MOU for each project that will set forth the legal rights and remedies amongst the parties to make the operating agency responsible to operate and maintain the property and allocate liability for claims involving the property to the operating agency.

1.2.3 When SANDAG constructs physical improvements to property acquired for the purpose of a project ("Subsequently Acquired Property"), the real property, including the improvements constructed by SANDAG, will be owned and operated by NCTD and MTS as the operating agency, if permitted by the funding source of the procurement, and unless otherwise agreed to by the parties. Notwithstanding the foregoing, the Affected Parties may agree to have one or more entities other than NCTD or MTS own Subsequently Acquired Property.

1.2.3.1 To convey the real property including improvements developed on Subsequently Acquired Property to NCTD or MTS, the Affected Parties will enter into an addendum to the Master MOU for each project that will set forth the legal rights and remedies amongst the parties to make the operating agency responsible to operate and maintain the property, and allocate liability for claims involving the property to the operating agency.

1.2.3.2 In the event the Affected Parties agree that Subsequently Acquired Property may offer the opportunity to be further developed for other public transportation uses, SANDAG will retain the appropriate real property interest to enable it to develop such public transportation projects on the property in the future.

1.2.4 In the event real property is procured by SANDAG utilizing Federal Transit Administration ("FTA") grants, said real property will be conveyed to NCTD or MTS, unless otherwise agreed to by the Affected Parties, and SANDAG will retain "satisfactory continuing control" within the meaning of the FTA regulations. The transfer mechanism for such property will be permitted by FTA regulations.

### 1.3 Personal Property

1.3.1 All property other than real property and its associated bundle of rights will be referred to herein as "Personal Property." Personal property procured by NCTD and MTS will be owned by the procuring agency or owned in accordance with the provisions of a Joint Procurement Agreement.

1.3.2 Personal Property procured by SANDAG for the operating purposes of NCTD or MTS will be owned, operated and maintained by the operating agency if permitted by the funding source of the procurement, and unless otherwise agreed to by the Affected Parties.

1.3.3 To the extent the funding source of the procurement of Personal Property requires SANDAG to retain ownership, SANDAG will convey possession of the Personal Property to NCTD or MTS pursuant to a lease which will obligate NCTD or MTS to operate and maintain the Personal Property and account for its use and maintenance. Said lease will require the operating agency to retain full responsibility for the operation, maintenance, and liability associated with the use and possession of the Personal Property.

- 1.3.4 In the event Personal Property is procured by SANDAG utilizing FTA grants, the Personal Property will be conveyed to NCTD or MTS unless otherwise agreed to by the Affected Parties, and SANDAG will retain "satisfactory continuing control" within the meaning of the FTA regulations. The transfer mechanism for such property will be permitted by FTA regulations.

## 2. DISPOSITION PROCEDURES

- 2.1 SANDAG has various assets which, over time, will be deemed obsolete due to normal use and wear, or new technology, or no longer needed due to project completion, underutilization, or surplus status. Therefore, these assets become candidates for disposal. Laws governing SANDAG's purchase of such assets require the use of a competitive procurement process. Likewise, the disposal or sale of property purchased with public funds should be done so in an open competitive process, unless the property will be assigned to government or nonprofit entities and designated for public purposes. It is SANDAG policy to capitalize assets with a unit purchase value of \$5,000 or more. This policy is intended to ensure that when SANDAG disposes of personal assets or real property assets, it will be done in a manner which is in the best interests of SANDAG, within the standards and procedures set forth.
- 2.2 Surplus properties are made available for various public purposes, including negotiated sale to state and local governments and eligible nonprofit institutions, or are sold competitively to the general public. State and local governments, eligible public institutions, and nonprofit organizations may acquire Surplus Property that SANDAG no longer needs on terms that SANDAG's Transportation Committee deems are in the best interest of SANDAG's goals and public need.
- 2.3 Surplus property that is not conveyed to state/local governments or other eligible recipients for public purposes may be sold to private individuals and companies by competitive bid.
- 2.4 Methods. The method of disposal must be approved by the Transportation Committee for capital assets with an individual or aggregate depreciated value of \$100,000 or more. For assets valued under \$100,000, the Executive Director may authorize disposal and the method. In either case, such methods may include, but not be limited to, the following:
  - 2.4.1 Trade-in allowance - provided that an independent appraisal is conducted to determine the value, or an analysis is conducted which certifies that the sale price is fair and reasonable.
  - 2.4.2 Use of other government agency-sponsored competitive auctions, such as the County of San Diego.
  - 2.4.3 Competitive sale.
  - 2.4.4 Negotiated sale.

- 2.5 Competitive Sale. Under a competitive sale, the following procedures must be followed:
- 2.5.1 Notification to the public. This would include, at a minimum, the placing of an advertisement in a newspaper(s) of general circulation. The ad must specify the item(s) to be sold, the condition and the terms for the sale, and the date/time/place sealed bids are to be received.
  - 2.5.2 All bids must be sealed.
  - 2.5.3 Prospective bidders may be afforded an opportunity to view the item(s) being disposed.
  - 2.5.4 Award. The award will be to the highest responsive, responsible bidder.
- 2.6 Negotiated Sale. Capital assets with an individual or aggregate value in excess of \$100,000 may be disposed of on a negotiated sale basis provided a finding by the Transportation Committee by a two-thirds vote that special circumstances exist that make it in the best interest of SANDAG. Such circumstances may include the following:
- 2.6.1 Unique item(s) may have a limited resale market.
  - 2.6.2 The financial interest of SANDAG would be best served by negotiation.
  - 2.6.3 In the case of used buses, the Transportation Committee will give specific direction on the method of disposal to be followed on a case-by-case basis considering potential financial return and available alternatives, including the sale for scrap or other nonoperating purposes to avoid use of the vehicles and resultant air pollution in California and the San Diego region. A method of disposal may be approved even though the financial benefit may be less than other methods of disposal.
  - 2.6.4 If approved, the Executive Director may be authorized to negotiate a sale price.
- 2.7 Ineligible Participants. SANDAG, NCTD, MTDB, SDTC, and SDTI employees, Board members and members of their immediate family may not participate in a competitive or negotiated sale of SANDAG capital assets.
- 2.8 Federal Grant Funded Assets. Capital assets which have been purchased with federal capital grant funds must be disposed of in a manner consistent with any applicable laws, including FTA regulations. The proceeds from such disposal will be distributed in the percent of which was provided for the original purchase unless fully depreciated.

- 2.9 Fully Depreciated Capital Assets. Capital assets with a depreciated asset value of less than \$1,000 may be disposed of by the least costly, most efficient method as determined by the Executive Director. For audit purposes, a memorandum must be filed which certifies the depreciated value of the asset and indicates the method of disposal (i.e., trash, destruction).

# TRANSPORTATION COMMITTEE

April 2, 2004

AGENDA ITEM NO.: **3**

**Action Requested: APPROVE**

## REGIONAL TRANSIT SERVICE PLANNING AND EVALUATION POLICY FRAMEWORK

### **Introduction**

Senate Bill 1703 transferred planning and programming functions of the North County Transit District (NCTD) and the Metropolitan Transit Development Board (MTDB) to the San Diego Association of Governments (SANDAG). Contained within these functions is the responsibility for developing a regional transit service planning policy and a regional fare-setting policy. The transit service policy would root transit service planning in regional policy and goals and define roles and responsibilities of SANDAG and the transit agencies. The fare-setting policy would establish goals and guidelines and set fares within the context of regional transit budget and funding decisions.

The Joint Committee on Regional Transit (JCRT) considered the proposed transit planning framework and transit service evaluation methodology on February 26, 2004, and forwarded the following recommendations to the Transportation Committee.

### **Recommendation**

The JCRT recommended that the Transportation Committee:

1. approve the transit service planning framework, included in Attachment 1, for use in developing a transit service planning policy;
2. approve the use of the service evaluation methodology, included as Attachment 2, as a demonstration of the policy process for evaluating new and existing services for the FY 2005 budget development process;
3. receive information on the framework for developing a fare-setting policy (Attachment 3), and
4. direct staff to return to the JCRT in May 2004 with an evaluation of the application of the service planning framework and service evaluation demonstration to guide a subsequent JCRT recommendation to the Transportation Committee for a Transit Service Planning and Performance Evaluation Policy.

## **Discussion**

### ***Transit Service Planning Policy***

The Initial Transition Plan for the consolidated agency and SANDAG Board Policy No. 18 (Attachment 4) establishes the guidelines for developing a transit service planning policy. The JCRT reviewed initial proposals for a policy framework in September and October 2003, and established a JCRT Task Force to address the framework in more depth. The Task Force met twice to guide the development of the proposed transit service planning framework included in Attachment 1. This revised framework was endorsed by the JCRT on February 26, 2004, to be used in developing the regional transit service planning policy. In addition, the JCRT endorsed the service evaluation methodology included in Attachment 2 as a demonstration of the policy process for evaluating new and existing services for the FY 2005 budget development process.

Over the next two months, SANDAG staff will apply the framework and evaluation methodology to service proposals submitted during this year's Regional Short-Range Transit Plan (SRTP) development as a demonstration of how the proposed policy would work. We will present an evaluation of the policy framework, evaluation methodology, and any recommended revisions to the JCRT for consideration in May 2004 and then return to the Transportation Committee with a Transit Service Planning and Performance Evaluation Policy recommendation from the JCRT.

### ***Fare-Setting Policy***

A framework for developing a fare-setting policy, included in Attachment 3, is presented for information, and will be reviewed by the JCRT in May 2004.

BOB LEITER

Director of Land Use and Transportation Planning

Attachments

Key Staff Contact: Conan Cheung (619) 557-4582; conan.cheung@sdmts.com

## REGIONAL TRANSIT SERVICE PLANNING FRAMEWORK

With consolidation, SANDAG is responsible for developing and adopting a regionwide policy for transit service planning. This policy would apply to both transit agencies (Metropolitan Transit System [MTS] and the North County Transit District [NCTD]). A regional transit service planning and performance evaluation policy will be rooted in regional policies and goals, and establish a process and agency responsibilities for transit service planning. In addition, it will provide a methodology for evaluating and prioritizing new service proposals for funding. The following section outlines a framework for transit service planning, while Attachment 2 outlines a service evaluation methodology.

### **Transit Service Planning**

Under the Initial Transition Plan for the consolidated agency, SANDAG is responsible for preparing the annual regional Short-Range Transit Plan (SRTP), monitoring the transit system, defining local versus regional service, and setting parameters for localized service changes. Transit operators are responsible for developing service proposals, implementing service changes, and monitoring their specific services. In accordance with the transition plan, the following is a proposed framework for guiding, developing, approving, implementing, and monitoring service changes, as illustrated in Exhibit 1.

#### *Guidance*

- Short-Range Transit Plan: SANDAG develops the regional SRTP every year based on the strategic vision identified in the Regional Comprehensive Plan (RCP) and the Regional Transportation Plan (RTP). The SRTP documents transit system monitoring that is conducted through a formal monitoring process (quarterly operations report, annual route monitoring report) and public comment. The SRTP also identifies regional service gaps and deficiencies within the system, and establishes a transit work program to provide guidance for short-range system development, including the annual Service Implementation Plan (SIP).

#### *Service Development*

- Regional Policy Consistency: Transit agencies and SANDAG develop service proposals to address service gaps and deficiencies identified in the SRTP and other studies, monitoring efforts, and public comment. A transit service checklist (Exhibit 2 is a draft of the checklist) will be developed as part of the SRTP to ensure consistency of the proposed new and revised transit services with adopted regional policies and goals. Proposed service changes will be reviewed using the checklist to ensure regional consistency and to identify regionally significant issues or impacts that should be addressed prior to funding and implementation.

#### *Approval*

- Local Service Changes: Service changes that have no significant regional issue or impact will be implemented at the sole discretion of the transit operator. Any public hearing and

approval for local service changes will be conducted at the transit agency level. It is anticipated that most of the service changes will fall under this category.

- Regionally Significant Service Changes: Service change proposals that result in a significant regional issue or impact should be developed in collaboration between SANDAG and the transit agency. Due to the significance and inter-operator nature of these service changes, they should be endorsed by the transit agency boards prior to being considered for public hearing and adoption by the SANDAG Transportation Committee. Regionally significant service changes include subregional service restructuring due to a new capital investment (e.g., new transit center and facility, new rail/bus rapid transit line), changes in regional travel demand, or to implement systemwide improvements or adjustments.
- Public Hearing: A public hearing should be conducted on any service change that results in a potentially significant ridership impact or adjustment/reduction in service. Public hearings should be advertised and conducted in accordance with SANDAG policy. In general, public hearings should be advertised on-board transit vehicles and in locally and regionally circulated newspapers, and should be conducted in the impacted service area.

### *Implementation*

- No Budget Impact: Service changes that can be implemented within a transit agency's or operator's adopted budget may be implemented at any time during regularly scheduled service change dates.
- Budget Impact: Service changes that result in an overall transit agency or operator budget adjustment will be approved for implementation by the SANDAG Transportation Committee during the annual budget development process. These changes include new services that require traditional transit subsidies above and beyond the overall adopted budget of the transit agency or operator, and service reductions in response to budget deficits. New service proposals will be included in the Service Implementation Plan included in the annual SRTP, and evaluated according to the methodology described in Attachment 2 titled "Service Evaluation Methodology." Service reductions will be developed during the budget development process.

### **Monitoring**

- Regional: At minimum, SANDAG should monitor service and system changes through formal performance monitoring procedures, including the Quarterly Operations Report, Annual Route Monitoring Report, and the Performance Improvement Program. This information would be shared with the SANDAG Transportation Committee and transit agencies and operators.
- Local: Transit agencies should monitor service changes according to their standard operating procedures. This information should be shared with SANDAG and other transit operators at the staff level.

Attachments: Exhibit 1, Framework for Transit Service Planning Flowchart  
Exhibit 2, Draft Regional Consistency Checklist

EXHIBIT 1: FRAMEWORK FOR TRANSIT SERVICE PLANNING

Interagency Coordination

*POMCC (working group),  
TA Boards (endorsement),  
SANDAG TC (approval)*

*Staff Collaboration*

*Policy Working Group*

*Staff Collaboration*

*Info relayed to POMCC,  
TA Boards, SANDAG TC*

*Reports to RTMC, TA Boards,  
SANDAG TC*

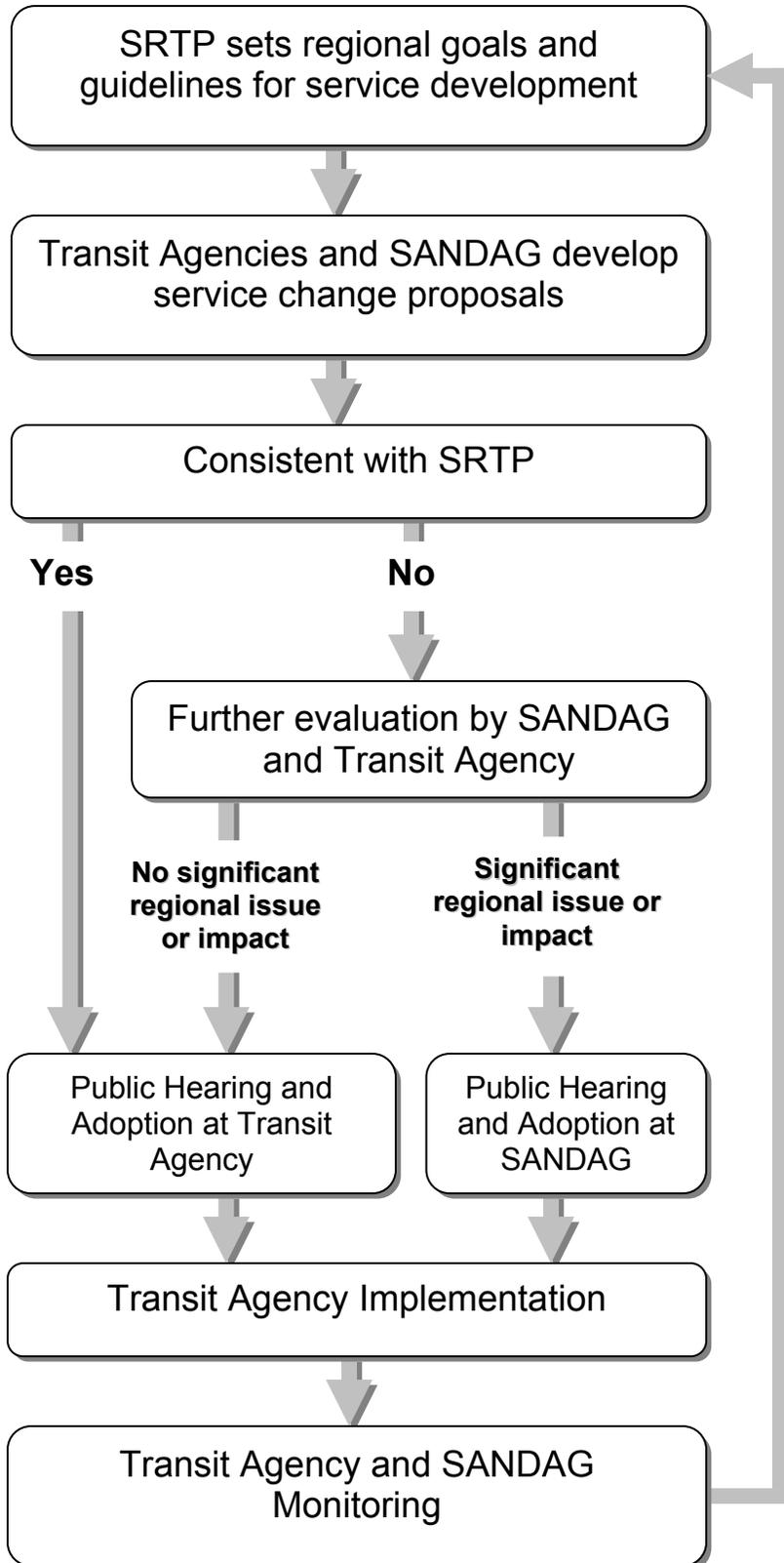


EXHIBIT 2: DRAFT REGIONAL CONSISTENCY CHECKLIST

Criterion	YES	NO
Does change impact more than 25 percent of a single route's revenue miles or hours?		
Does change require additional subsidies not currently budgeted?		
Does change duplicate other existing service (e.g., operates similar schedule along similar routing)?		
Does change impact transit network connectivity (e.g., timed transfers, connections to regional services, etc.)?		
Is change contingent on a significant reallocation of financial resources from another service?		
Does change result in significant negative impacts to existing passengers (e.g., out-of-direction travel, increased travel time, overcrowding, on-time performance)?		
Does change result in significant peak hour frequency reductions?		
Does change result in service span being reduced by more than four hours total?		
Does change reduce service to a major transit capital facility (i.e., rail line, transit center)?		
Does change reduce service to Smart Growth incentive area?		
Is change inconsistent with SANDAG adopted plans, policies, and guidelines?		

\*Any yes answers shall initiate service change review by SANDAG and Transit Operator Staff

## SERVICE EVALUATION METHODOLOGY

The proposed evaluation methodology, developed in conjunction with the transit agencies, provides a balanced and equitable process for evaluating the benefits and characteristics of new service proposals outlined in the Service Implementation Plan. The methodology includes a quantitative component aimed at measuring the productivity and cost-effectiveness of each proposal, and a qualitative component that evaluates the merits of each proposal according to other regional goals. The following describes the proposed framework for evaluating new services.

### Quantitative Analysis

- Transit service proposals will be evaluated against like services only (i.e., route categories based on service and service area characteristics).
- The quantitative analysis will equal 50 percent of the overall evaluation score for each proposal, and includes an evaluation of passengers per revenue hour (productivity), and subsidy per passenger (cost-effectiveness).
- Targets for the two performance criteria will be set for each route category.

### Qualitative Analysis

In addition to the quantitative analysis, proposals will be evaluated against three qualitative criteria totaling 50 percent of the overall evaluation score:

- **Address Service Gaps and Deficiencies:** Does the service proposal address a service gap (i.e., time of day, day of week, geographic) or deficiency (i.e., on-time performance, overcrowding) that has been identified in the SRTP, other adopted planning studies, or system monitoring? This criterion will represent 20 percent of the overall evaluation score.
- **Supports Regional Transportation and Land Use Plans and Projects:** Does the service proposal support a major transit capital investment (e.g., Mission Valley East, Sprinter, Interstate 15 [I-15] Managed Lanes/Bus Rapid Transit [ML/BRT], Nobel Coaster Station, major regional transfer centers), and transit-oriented land uses (i.e., higher density, pedestrian/bike friendly, transit-friendly design, major activity centers and Smart Growth Opportunity Areas as defined in the RCP)? This criterion will represent 15 percent of the overall evaluation score.
- **Affordability:** Does the service proposal require low transit subsidies compared to all other proposals? Is this service proposal supported by nontraditional funding, such as private funds, nontraditional transportation grants, and other sources? This criterion will represent 15 percent of the overall evaluation score.

## **Service Prioritization**

Based on the quantitative and qualitative criteria described above, proposals will be prioritized for implementation using their combined overall score. In addition, supporting data for each proposal, such as operating cost and ridership, will be presented. The service priorities will be the basis for new and revised transit service funding during the annual budget process.

The service categories and quantitative criteria will also be used to evaluate the existing transit system's services on an annual basis. Poor performing services would be candidates for further analysis and possible modification or elimination.

## **Budget Process and Implementation**

New and revised services approved for implementation during the annual budget process will be reflected in the respective transit agency/operator budget. The transit agencies/operators will implement the approved service during one of the regularly scheduled service changes in the summer, fall, and winter. New services will initially be implemented for a two-year trial period to establish its performance (at least 75 percent of its service category target for passengers per revenue hour and subsidy per passenger). If these thresholds are not met, the service may be revised or discontinued.

## SANDAG REGIONAL FARE POLICY FRAMEWORK

With the approval of Senate Bill (SB) 1703, the planning and programming functions of the Metropolitan Transit Development Board (MTDB) and the North County Transit District (NCTD) were consolidated under the San Diego Association of Governments (SANDAG). Contained within these functions is the responsibility for developing a Regional Fare Policy, including setting fares for transit services in the region. The Initial Transition Plan for the regional consolidation specifies that SANDAG will develop the Regional Fare Policy, carried out in consultation with the transit agencies and operators.

This Regional Fare Policy Framework would apply to both transit agencies (Metropolitan Transit System [MTS] and NCTD).

### **Objectives**

The Regional Transit Fare Policy should accomplish a number of objectives, as outlined below, along with specific policy statements that support each objective.

#### *Regional Participation*

As previously mentioned, the development of a Regional Fare Policy is required under the Initial Transition Plan. For the policy to be most effective, it will be necessary for all transit operators in the region to adopt and implement the regional policy according to the following guidelines:

- A single, unified regionwide fare policy and transfer system shall be maintained for all publicly subsidized operators.
- All publicly supported transit operators shall participate in the system to be eligible for public subsidy.
- All publicly supported transit operators shall use and accept regional fare media.

#### *Production*

As the single largest source of operating revenue, fares are a critical source of operating revenue for transit operators in the region. Fare revenue enables the region to leverage public subsidies to provide more service than would otherwise be possible. Fare revenues should meet or exceed the level necessary to support the base level of service given the current level of public subsidies available.

- SANDAG shall adopt a specific regionwide farebox recovery ratio objective each fiscal year as part of the budget adoption, consistent with the requirements of the Public Utilities Code (PUC) regarding the disbursement of Transportation Development Act (TDA) funds.
- The fare pricing schedule shall be set to be consistent with meeting or exceeding the specified farebox recovery requirements.

- The regional annual average fare (per passenger), over time, should generally be consistent with annual increases in regionwide transit cost indicators and/or the rate of inflation.
- The financial impacts of a fare change should be balanced with the impacts on ridership.
- Regionwide fare discounts should generally be limited to senior and disabled patrons and prepaid fare programs (e.g., monthly passes, the College Pass, and the Eco Pass), and any mandated federal, state, and local programs.
- Higher fares generating higher revenues will be set for premium, high-quality transit services.

### *Fairness*

The policy must be fair and equitable to all operators and passengers in the region.

- Fare levels shall be consistent for similar types of service in similar service areas.
- Transfers between all routes shall be facilitated, with the cost of such transfers being related to any difference between the types of service and respective fare levels.
- Fare levels should reflect a combination of the type of service, distance and speed of travel, and customer amenities provided to the customer, with higher fares set for higher quality and premium services.
- A proposed fare pricing and/or policy change shall include a public notice and a public hearing by SANDAG on the proposed fare change. A public notice shall be provided as legally required, including written notice on all public transit vehicles which are affected by the proposed fare changes, and legal notices to newspapers. Public hearings will be conducted according to SANDAG adopted policies.

### *Simplicity*

The fare policy shall promote seamless travel throughout the region by developing one common, easily understood and verified fare structure throughout the region. With two transit agencies and six transit operators in the region, customers often use different services or transfer between operators to reach their destinations. A complex fare system can be confusing to passengers, and may deter potential riders from trying the system. In addition, different fare structures and fare media can complicate and hinder the fare collection process. Although a regional fare structure has been maintained since 1981 that recognizes transfers and regional pass acceptance, we hope to simplify this structure through the regional fare-setting process.

- The fare structure and transfer system shall be simple and easy to understand for users.
- The number of fare, transfer, and pass options shall be minimized to promote user friendliness and efficient fare validation.

- The pricing structure shall be based on equal or easily identifiable coin increments.
- The fare collection process aboard a transit vehicle should be designed to be as expeditious as possible.
- Vehicle driver/operator involvement in the fare collection process on-board the transit vehicle should be minimized.
- Use of prepaid fares (e.g., monthly passes and tokens) should be encouraged to speed the patron boarding process.
- The automated fare collection system should be developed to simplify fare payment and collection, while providing the region with the opportunity to develop specialized fare structures that will be transparent to the user and driver/operator.

### **Process/Responsibilities**

With the development of the Regional Fare Policy, the roles and responsibilities for the policy must be defined.

- SANDAG would develop the Regional Fare Policy and set the basic fare pricing structure for transit services in the region. The Initial Transition Plan also states that transit agencies have the ability to set special fares consistent with this policy.
- Transit operators would implement and adhere to the policy.
- The policy would be reviewed at least every two years.
- Review would be completed as part of, and presented with, the annual budget process.
- An operator advisory committee would be formed to review the Regional Fare Policy and propose changes to the policy. Specialized programs that are consistent with the Regional Fare Policy shall be considered.



## BOARD POLICY NO. **018**

### **TRANSIT SERVICE PLANNING**

This policy specifies the transit service planning responsibilities of the consolidated agency and the responsibilities of the transit agencies. Figure 1.1 is a flow chart documenting the process for transit planning and the delivery of services.

Planning responsibilities vary for regional service and local service. Flexibility in implementing the service, in terms of minor changes to the planned services, is provided to the transit operators.

1. Consolidated Agency Responsibilities – carried out in consultation with the transit agencies
  - 1.1 Preparation of long-range transit plans as part of the Regional Transportation Plan (RTP).
  - 1.2 Preparation of a five-year Short Range Transit Plan (SRTP) that defines both changes to regional and local service and new services, including new services for areas being developed, each year over the five-year period covered in the plan. The consolidated agency would initially maintain the existing service concepts upon which the service is based in order to preserve and improve mobility. FY 2003 budgeted revenue hours/miles would be considered as minimum levels of service for each Transit Board and would assume net service levels to be added upon completion of the Oceanside to Escondido and Mission Valley East rail projects. If future funding shortfalls occur, necessitating cutbacks in service, then there would be a regionwide process of examination of service levels, protecting a “lifeline” system of services.
  - 1.3 Annual route evaluations which will be incorporated into the annual updates of the SRTP and planned service changes. (Evaluations should vary by type of service and type of service area.)
  - 1.4 Define regional transit service<sup>1</sup> in terms of the type of service, the route configuration, frequency of service, service hours, required major stops, and required timed-transfers with other services. (These regional services may cross transit operator boundaries.)
  - 1.5 Identify parameters for local route transit services<sup>2</sup>, including geographic area, frequency of service, service hours, required connections to regional transit service

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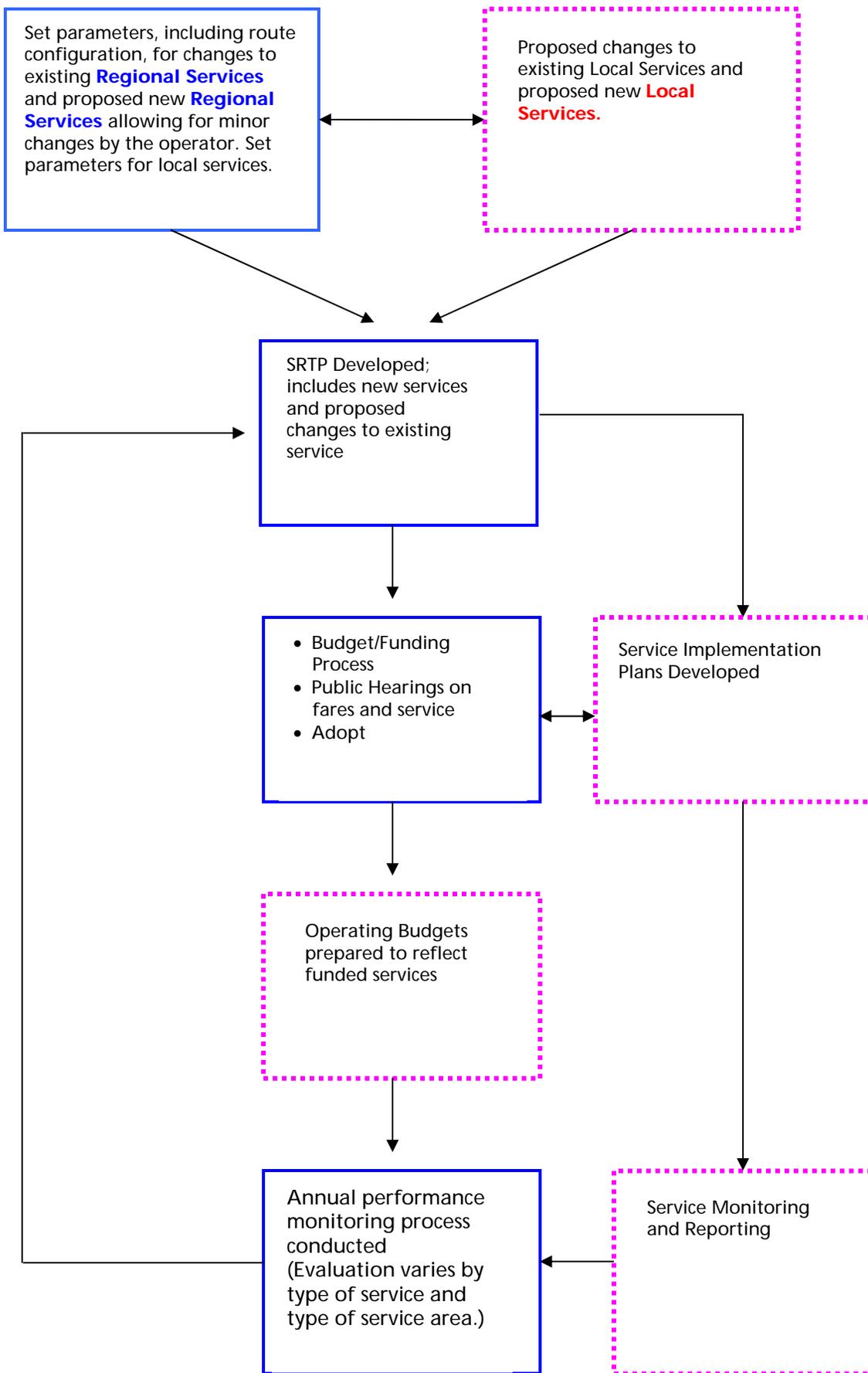
<sup>1</sup> Regional transit service is defined as Corridor and Regional Service in the 2030 RTP, along with inter-community service, with lower speed, frequent stops.

<sup>2</sup> Local route transit service is defined as intra-community service, with lower speed, frequent stops and community based shuttles, with lower speed, frequent stops.

defined in 1.4 above, and service unit (revenue hours, miles, or operating budget). Through an agreement with the consolidated agency the transit operators would define the actual route configuration within the defined parameters, see below Transit Operator Responsibilities.

- 1.6 Provide technical assistance to transit operators for local route planning.
  - 1.7 Develop a public input process and hold required public hearings for service changes. The consolidated agency should ensure that the public input process for public hearings on service changes would be conducted in a manner to facilitate public input from the affected area.
  - 1.8 Develops the Regional Fare Policy which incorporates a uniform fare structure, a transfer policy, and agreement for revenue sharing of regional tickets, tokens, and passes, while also allowing the consolidated agency to adopt specialized fare procedures for travel within each operator's service area. Additionally, adopt the Comprehensive Fare Ordinance setting forth all fares for all operators, including their special fares.
  - 1.9 Adoption of transit operator Service Implementation Plan to fund defined services.
2. Transit Agencies Responsibilities – carried out in consultation with the consolidated agency
- 2.1 Development of a Service Implementation Plan for regional and local transit services including defining route stops, and development of schedules/ run cutting, operating budget, and capital improvement needs. Through an agreement with the consolidated agency local route planning also would include defining the route configuration within the defined community area. Minor changes to a transit operator's defined service (less than 25% of revenue miles/hours of a route within the operator's existing approved budget) will be at the discretion of the transit operator.
  - 2.2 Development of a Service Implementation Plan for special event transit service and service contingencies.
  - 2.3 Submit Service Implementation Plan to the consolidated agency for adoption.
  - 2.4 Service implementation including operations, contract services, service management, temporary changes and detours of service, service monitoring and reporting, and labor contract administration.
  - 2.5 Provide input on long and short range transit plans, and route evaluations.

"Community" refers to residential, commercial, services, and/or employment areas that are closely linked and not defined strictly by municipal boundaries.



**Solid Boxes = Consolidated Agency function**

*Dashed Boxes = Transit Agencies function*

**Figure 1.1  
Transit Service Planning**

**TRANSIT POLICIES OF THE CONSOLIDATED AGENCY**

<b>Transportation Committee – May 16 (RECOMMEND); SANDAG Board – June 27 (APPROVE)</b>		
<b>Policy Title</b>	<b>Description</b>	<b>Existing Policies</b>
Transit Service Planning (#016)	Specifies the transit planning responsibilities of the consolidated agency and the responsibilities of the transit agencies	Initial Transition Plan (Attachment 1)

<b>Potential Policies for Future Transportation Committee/SANDAG Board Meetings</b>		
<b>Policy Title</b>	<b>Description</b>	<b>Existing Policies</b>
Uniform Fare Setting	Establishes a uniform fare setting policy for the San Diego region	Uniform Fare Structure Agreement MTDB No. 29 NCTD Admin. No. 14
Out-of-Direction Bus Routings	Establishes a procedure for evaluating the effectiveness of existing or proposed fixed-route bus segments that have out-of-direction routings	MTDB No. 39 NCTD – To be determined
Bus Stop and Minor Reroute Procedures	Establishes procedures for evaluating requests to add or remove bus stops and/or to make minor changes to existing bus routes	MTDB No. 44 NCTD TBD Initial Transition Plan
Dedication of Right-of-Way for Transit	Establishes a policy to obtain right-of-way for transit purposes as part of the local development review process	MTDB No. 51
Transit/Land Use Planning Coordination	Establishes a policy and procedures for coordinating transit planning with long-range, short-range, and immediate-action local land use plans	MTDB No. 40 NCTD SRTP (Chapters II, V)

<b>Potential Policies for Future Transportation Committee/SANDAG Board Meetings</b>		
<b>Policy Title</b>	<b>Description</b>	<b>Existing Policies</b>
Initiation of New Transit Services	Establishes a policy that all new transit services will be bid through a competitive process	MTDB No. 32 NCTD – To be determined
Existing and New Transit Service Evaluation	Establishes a policy and procedures for evaluating and adjusting existing transit services to improve performance, and for evaluating and recommending new transit services for implementation	MTDB No. 43 NCTD SRTP (Chapter VII)
Major Transit Capital Feasibility Principles	Establishes a policy for evaluating the feasibility of major transit capital projects/investments	MTDB No. 1 NCTD – To be determined
Joint Use and Development of Property	Establishes guidelines and procedures for evaluating proposals for joint use/joint development of transit properties and rights-of-way	MTDB No. 19 NCTD – To be determined
Transportation Development Act (TDA) Rules and Regulations	Establishes rules and regulations for determining eligibility for and allocating TDA funds	MTDB No. 18 NCTD – Not applicable SANDAG TDA Claim Guidelines
Allocation of State Transit Assistance (STA) Funds	Establishes procedures for allocating STA funds ( <i>may be combined with TDA policy above</i> )	MTDB No. 21 NCTD – Not applicable SANDAG TDA Claim Guidelines (Chapter 9)
Use of Transit Facilities by Transit Operators outside the San Diego Region (NEW)	Establishes a policy governing the use of transit facilities by public or private transit operators outside of the San Diego region	None existing
Public Participation for Construction Projects	Establishes a policy for obtaining input from and giving information to the public concerning major capital construction projects developed by the consolidated agency.	None existing

# TRANSPORTATION COMMITTEE

April 2, 2004

AGENDA ITEM NO.: **4**

**Action Requested: APPROVE**

## UPDATE ON TRANSIT FIRST SHOWCASE PROJECT

### Introduction

The Regional Transportation Plan (RTP), MOBILITY 2030 envisions a regional transit system that is the first choice for many of our trips. This vision calls for a network of fast, flexible, reliable, safe, and convenient transit services to connect residential neighborhoods to major employment and activity centers. The implementing strategy, known as Transit First, focuses on four key elements: (1) service concepts (including long distance, medium distance, local, and neighborhood services); (2) transit priority measures; (3) customer experience; and (4) community design. Bus Rapid Transit (BRT) will be key to advancing Transit First and implementing MOBILITY 2030.

In July 2002, the San Diego Metropolitan Transit Development Board (MTDB) selected a Transit First BRT Showcase Project for design, with the goal of implementing service by 2006. The Showcase Project corridor runs from San Diego State University (SDSU) to downtown San Diego via El Cajon and Park Boulevards and would provide the kind of medium-distance BRT service outlined in Transit First. The project is also intended to demonstrate the key elements of Transit First, including smart card fare collection, transit lanes, signal priority, low-floor vehicles, and enhanced stations. Unique branding of vehicles and stations will identify this high-quality service to the public. A status report on this project was provided to the Transportation Committee in August 2003. This item will report on further progress since that time, and will discuss a strategy for addressing transit needs in the Mid-City communities.

### Recommendation

It is recommended that the Transportation Committee:

- Support the concept of a "transit lane" along Park Boulevard through Balboa Park, to be designed in collaboration with the City of San Diego Park and Recreation Department as it completes the Balboa Park Parking and Circulation Study and plan amendments.
- Approve the following Action Plan to further define the Showcase Project and address issues that have arisen in project planning to date:
  1. Authorize the preparation of a work scope, in collaboration with the Mid-City community, to conduct a Mid-City Transit Network Plan at a cost of approximately \$75,000 to be funded from the Showcase Project budget. The Transit Network Plan would define the operating concept for the Showcase Project in the context of a community-wide transit network.

2. Pursue a peer review of industry experts to evaluate and provide input to the Showcase Project design and Transit Network Plan.
- Defer further preliminary engineering and final design work on the Showcase Project pending the completion of the Action Plan, which would result in completing the Final Design by mid-2006 with project opening (assuming funding availability) in 2007/8.

## **Discussion**

### *Background*

The Showcase Project extends from SDSU to downtown San Diego via Park and El Cajon Boulevards (see Attachment 1). The major activity centers served along the route include the Santa Fe Depot, City College, Naval Hospital, Balboa Park, San Diego Zoo, the Mid-City communities (North Park, Normal Heights, and City Heights), and SDSU. This corridor is included in the 2030 RTP under all funding scenarios.

In 2001, MTDB approved development of a "Showcase Project" to demonstrate the principles of the Transit First strategy, including the integration of transit and land use planning, implementation of a wide range of transit priority measures, and providing for an enhanced level of customer amenities (e.g., smart card fare collection, upgraded station designs, special vehicle branding). The MTD Board directed that the Showcase Project be constructed and operational within a three to five year time frame. This short time frame was desirable because the project would be a tangible example of Transit First service that would serve as a model for other Transit First projects throughout the region. The Showcase Project would highlight the benefits of upgraded service, while also providing a learning experience to the transit operators. A number of corridors were evaluated, with the SDSU-Downtown corridor being selected in 2002 due to its high ridership potential, existing transit-supportive land uses, and short-term implementation feasibility. The SDSU-Downtown Showcase Project is being designed as a corridor-level, arterial-street BRT service aimed at serving medium-distance trips with operating speeds, service frequencies, and station spacing similar to that of trolley service.

For the past year, design work on the project has been conducted, including a signal priority plan for the corridor, station and shelter concepts, and preliminary engineering design for the stations, pedestrian improvements, and transit lanes along Park Boulevard from University Avenue to El Cajon Boulevard and along El Cajon Boulevard from Park Boulevard to 43rd Street (the "focus area"). A traffic study has also been prepared.

The Showcase Project is being developed with the assistance of a Project Review Committee (PRC) which includes neighborhood, institutional, and business representatives. The PRC provides input on the design and planned operation of the project. Additional public input has been obtained at a workshop and at numerous community planning group meetings.

### *Traffic Study/Transit Lanes*

The original concept plan for the Showcase Project included transit lanes on three segments of the corridor:

- A. Park Boulevard through Balboa Park
- B. Park Boulevard between University Avenue and El Cajon Boulevard
- C. El Cajon Boulevard from Park Boulevard to 43<sup>rd</sup> Street.

El Cajon Boulevard east of 43<sup>rd</sup> Street and College Avenue to SDSU were not proposed to have transit lanes. BRT service in these segments would be achieved through transit signal priority only.

Given the budget constraints at the time we began the preliminary engineering studies, we focused our efforts on the latter two segments (Segments B and C). The Park Boulevard transit lane between University Avenue and El Cajon Boulevard (Segment B) is designed as a median transit lane, while the El Cajon Boulevard transit lane (Segment C) would be located adjacent to the on-street parking lane. Although Segment A (Park Boulevard through Balboa Park) is not part of the focus area and current preliminary engineering contract, we now need to work in collaboration with the City of San Diego Park and Recreation Department on preparing conceptual design plans for the Balboa Park transit lane and stations. Further discussion on this activity is included below.

A traffic study has been prepared to analyze the impact of the two transit lane segments (Segments B and C). The traffic study also analyzed the impact of a proposed pop-out BRT stations (stations which extend the sidewalk area into the on-street parking lane to increase the station platform area) east of 43<sup>rd</sup> Street that result in transit vehicles stopping in a travel lane while serving the stations. The traffic study found that most intersections and street segments would operate at an acceptable level of service well into the future. However, there would be delays between Utah Street and Interstate 805 (I-805), as a result of vehicles queuing to access the freeway ramps. We have examined several alternative measures to alleviate this impact:

- Eliminate the transit lanes between Utah Street and just east of I-805. The transit vehicles would operate in a shared lane for this segment, and could maneuver into any of the travel lanes except while serving the station at 30<sup>th</sup> Street.
  - Pros: Eliminates the traffic impact in this segment of the corridor. Allows vehicles to more easily access the I-805 freeway ramps.
  - Cons: Degrades the transit priority for the Showcase Project, reducing both the operational benefits and public perception of the project. A short bus holding area at 30<sup>th</sup> Street and near the freeway ramps will help transit vehicles move to the front of the queue.
- Designate the lane as a shared transit/high-occupancy-vehicle (HOV) lane for this segment.
  - Pros: Reduces the traffic impact in this segment of the corridor.
  - Cons: Degrades the transit priority for the Showcase Project, potentially confuses drivers, and complicates enforcement of the lane use.
- Convert the on-street parking lane into a transit lane, and purchase neighboring properties to build replacement parking. As many as 79 parking spaces would have to be replaced along this segment. If replaced at a single location the parcel would have to be slightly larger than one acre.

- Pros: Eliminates the traffic impact in this segment of the corridor and maintains the transit priority for the project.
- Cons: Potential impacts to businesses along El Cajon Boulevard from relocated parking and significant additional cost to the project for replacement parking.

Our preliminary recommendation is to eliminate the transit lane between Utah Street and I-805. Designating this small segment as an HOV lane could be confusing to motorists, resulting in compliance problems. Converting the parking lane into a transit lane would be a viable option if sufficient funds were available to provide replacement parking; however, land acquisition would be a difficult endeavor, and it is unlikely that replacement parking could be provided on every block leaving some businesses with reduced convenient parking. However, as we move forward with the Showcase Project design, we should take care to minimize degradation of priority measures and other design features that are key to Showcase Project success.

#### *Balboa Park*

The Balboa Park segment (Segment A) of the corridor is not under preliminary engineering at this time. However, the City of San Diego is currently preparing a Balboa Park circulation and parking study to provide guidance on the long-term relationship of parking, transit, shuttles, and land uses. This study is providing recommendations for the sizes and locations of parking reservoirs and for the disposition of Park Boulevard, which is part of the Showcase route. The study will form the basis of future amendments to the Balboa Park Master Plan and the Central Mesa Precise Plan. The study has involved numerous meetings with the Balboa Park Committee, public workshops, and meetings with stakeholder groups. We have worked with the City of San Diego's Park and Recreation Department and its consultant to include plans for the Showcase Project stations and transit lane within the Balboa Park segment of Park Boulevard.

The original concept plan for Segment A along Park Boulevard through Balboa Park (prepared prior to selecting this corridor as the Showcase Project) proposed that the current on-street parking lane be converted to a transit lane, along with replacement parking in off-street structures. However, the City's Park and Recreation Department believes that conversion of an existing travel lane to a transit lane in this segment, while retaining the on-street parking, would be more beneficial to the park. The transit lane would be used by local buses, park shuttle vehicles, and Showcase vehicles. There has also been discussion about permitting HOVs in the lane. The exact mix of vehicles will be determined in the future, following a traffic study for this portion of the corridor. The transit lane would be designed to improve the visual quality of Park Boulevard and return the street to its original role as a park amenity rather than a through route. The next step will be to prepare concept plans for the transit lane and stations. However, preliminary engineering plans and traffic studies are not yet funded for this segment. Therefore, we are recommending that the Transportation Committee support the concept of a transit lane in this segment as we work collaboratively with the City Park and Recreation Department through the planning process.

#### *Transit Signal Priority*

As part of the current contract, a transit signal priority plan is being prepared to determine how to improve traffic signal timing to benefit transit vehicles and traffic flow in general. At the

August 3, 2003, Transportation Committee meeting, we reported that several technology solutions were being considered for transit signal priority (TSP) along the El Cajon Boulevard corridor. The El Cajon Boulevard segment of the corridor has the highest potential for using TSP to reduce transit travel time. There are a large number of signals on the boulevard, and thus the frequency of signal-related stops is high. Also, many of the cross streets have relatively high traffic volumes, leading to longer cross-street green times that currently contribute to transit delay. Implementing TSP is expected to have several community benefits in addition to improved transit travel time by improving a signal coordination system that is currently in place but operating poorly. Signal coordination allows through traffic to proceed along a corridor with minimal stops at traffic signals. The emergency vehicle pre-emption system would be re-tooled so that it operates better, allowing emergency vehicles to reach their destinations quicker.

An analysis was undertaken to assess various types of TSP technologies. In addition to the City of San Diego where the Showcase Project is located, the analysis examined the different signaling systems in other jurisdictions where future Transit First services are proposed in the MOBILITY 2030 network. The aim is to have a TSP technology that will work throughout our region. The TSP analysis recommended use of the optical emitters such as Opticom to provide signal priority. Opticom equipment is already in place at many of the intersections along El Cajon Boulevard, although the equipment would need to be upgraded. In addition, much of the existing conduit and some of the fiber optic cable are old or inadequate and will have to be replaced. Cost estimates for the technology improvements are being developed.

#### *Transit Station Design*

Several station designs have been prepared and continue to be refined. The stations (see example in Attachment 2) will include features to improve boarding speed (raised platforms, passenger information, ticket vending machines), as well as amenities such as next vehicle arrival information signs, bicycle racks, and improved waiting areas. The design is a streamlined look that allows maximum exposure for the adjoining businesses, while still meeting passenger needs for shade, shelter, and comfort. Each station will also contain elements that can be customized to reflect the character of the surrounding neighborhood.

#### *Capital Cost Estimates*

We have begun to develop construction cost estimates for the Showcase Project. The estimates reflect a greater level of detail for the focus planning area (those portions of the corridor that are currently undergoing preliminary engineering), and assumed project costs for the remainder of the corridor. Future modifications to the project would result in changes to the cost estimates.

Based on earlier studies, a capital cost estimate of \$80 million was included in the draft *TransNet* Expenditure Plan. Our current work effort has developed more detailed capital cost estimates for stations, transit lanes, and signal modifications. Cost estimates for the technology components such as signal priority and next vehicle system costs have not yet been developed. However, indications are that Showcase Project capital costs will be in the projected \$80 million range.

## *Comprehensive Transit Planning for Mid-City*

As detailed plans for the Showcase Project develop, some members of the PRC and the public have requested a broader commitment to transit in Mid-City beyond development of the Showcase Project. At the same time, community support for dedicating a transit lane on El Cajon Boulevard has been mixed. There seems to be overall support for developing the Showcase Project in a comprehensive manner to vastly improved transit service in the corridor. However, various interests (notably the El Cajon Boulevard Business Improvement Association) have expressed reluctance to dedicate a transit lane on El Cajon Boulevard in the absence of a long-range plan for transit services in the area.

In addition, questions have been raised about the frequency of Showcase service, the possibility of running a limited-stop peak-period overlay service, the need for north-south services to connect Mid-City to employment centers, and the need for shuttle service to penetrate residential neighborhoods and connect them to the transit grid. These additional service concepts have not been analyzed comprehensively, and have not been analyzed in light of the Transit First concept (developed over the last few years). Cost estimates have not been developed for these services, and priority rankings have not been prepared.

To address these concerns, we are recommending that a Mid-City Transit Network Plan be prepared. The plan would create a network of the Transit First hierarchy of services (long distance, medium distance, local, and neighborhood) serving Mid-City, and establish priority ranking for these services. The plan is estimated to cost \$75,000 and would take approximately six months to prepare, during which time further preliminary engineering and final design on the Showcase Project work would be deferred. We would work with the Mid-City community to prepare a scope of work to develop the plan. A preliminary outline for the Scope of Work for the Mid-City Transit Network Plan is included as Attachment 3.

We are also evaluating the concept of convening a peer review panel to review the Transit Network Plan, Showcase Project plans, and transit strategy in the fall of 2004. The panel would consist of transit and BRT experts who have designed and implemented rapid transit projects in this country. A detailed plan and budget for this effort have not yet been developed. Following completion of the Transit Network Plan, we would prepare a detailed scope of work and return to the Transportation Committee for further direction. Preliminary engineering, final design, and environmental documentation on the Showcase BRT Project would also be deferred pending conclusions from the peer review panel. This deferral will have an impact on the original schedule for the Showcase Project, originally adopted by MTDB in 2002, that would have completed preliminary engineering, final design, and environmental documentation by late 2005, with construction and vehicle acquisition occurring in 2006 and service starting in summer/fall of 2006. The work delay will now result in final design completion in mid-2006, and launch of service in 2007 (assuming funding availability).

A timeline and strategy are included as Attachment 4 to this report.

## *Conclusions*

The current preliminary engineering contract for the Showcase BRT Project focus area is drawing to a close. Project planning has been progressing well, and the project continues to commend itself as a favorable transit service with high implementation feasibility. However, additional work needs to be done. The Balboa Park transit lane needs to be incorporated into the City of San Diego's Balboa Park Master Plan. Community and business interests are not yet comfortable with the El Cajon Boulevard transit lane, and more analysis and discussion on this topic is needed. Community members also feel that a comprehensive transit network plan outlining a system of transit services is needed for the Mid-City communities before they will endorse the Showcase Project. Further engineering work will be needed before construction can begin. Finally, the *TransNet Extension* ballot measure will determine whether funding for construction and operations is available. At this point in the project, we believe it is prudent to proceed with the Transit Network Plan and peer review, and return to the Transportation Committee with conclusions from these activities and a proposal for next steps.

BOB LEITER

Director of Land Use and Transportation Planning

Key Staff Contact: Miriam Kirshner, (619) 557-4585; mkirshner@mtdb.sdmts.com

## Attachments

Attachments 1 and 2 are available in hard copy only and may be obtained by contacting SANDAG's Clerk of the Board at (619) 699-1912.

Attachments 3 and 4 are attached.

SCOPE OF WORK  
OUTLINE

MID-CITY TRANSIT NETWORK PLAN

PURPOSE

- Develop an overall transit network plan for Mid-City communities to define how the Showcase Project will fit into a network of transit services.
- Define the neighborhood, local, corridor, and regional services needed to serve the Mid-City communities, including a long-term plan for service improvements and a phased implementation strategy.

BACKGROUND

Review previous studies conducted in the project area:

- Mid-City Bus Study
- Transit First Now! engineering plans
- Route 11 Bus Stop Consolidation Study
- Mission Valley East Bus Feeder Study
- The City of San Diego's Strategic Framework/City of Villages Plan
- Showcase Project studies and plans

PROJECT SCHEDULE AND BUDGET

This study will take approximately six months to complete. The budget shall not exceed \$50,000 (To Be Determined).

DESCRIPTION OF TASKS AND PRODUCTS

The Scope of Work consists of the following tasks:

- Task 1: Data Analysis - Gather and review existing information related to the study area.
- Task 2: Analysis of Transit Service Needs - Analyze existing and future transit travel needs in the project area in light of plans to develop the Showcase Project and bus rapid transit along Fourth-Fifth Avenues and the Interstate 15 (I-15) corridors. Focus on travel demand needs within the project area and immediately adjacent areas.
- Task 3: Development and Evaluation of Alternative Operating Scenarios - Develop two to three operating scenarios/strategies for the Showcase service, including the possibility of an express overlay, and for local and neighborhood services for short-distance trip-making

and feeder service. The scenarios tested should be sensitive to operating funding limitations. Analyze future route productivity for Routes 1, 15, and 115 after opening of the Showcase Project.

Task 4: Long-Range Vision Network Plan - Recommend a long-range vision plan, including a discussion of the relationship of the plan to existing and proposed land uses.

Task 5: Phased Implementation Plan - Develop a phasing plan based on service priorities and likely funding availability, and evaluate opportunities for public-private partnerships that could help implement local/neighborhood service improvements.

Task 6: Agency Coordination and Public Involvement - Attend three meetings to obtain public input and response

Task 7: Report Preparation

**SHOWCASE PROJECT STRATEGY & SCHEDULE****A. Mid-City Transit Network Plan**

- Objective: develop a long-term plan for service improvements in the Mid-City area and a phased implementation strategy plan based on service priorities over the next 30 years.
- See attached scope of work
- Timing: April-October 2004

**B. Peer Review Panel**

- Objective: obtain independent third-party review of the Showcase Project plans and the Transit Network Plan
- Timing: October-November 2004

**C. Balboa Park Transit Lane**

- Objective: prepare conceptual design of possible transit lanes and stations in Balboa Park
- Timing: March-June 2004

**D. Future Steps (through Final Design)**

- Preliminary engineering design for remainder of corridor
- Final design for entire corridor
- Environmental documentation
- Final station design, including colors, art, and signage
- Timing: December 2004 – June 2006

**E. Construction and Vehicle Acquisition**

- Timing: January 2006 – June 2007

**F. Start of Service**

- Timing: June-July 2007

# TRANSPORTATION COMMITTEE

April 2, 2004

AGENDA ITEM NO.: **5**

**Action Requested: SUPPORT**

UPDATE TO MEMBER AGENCIES FROM THE LOS ANGELES –  
SAN DIEGO – SAN LUIS OBISPO RAIL CORRIDOR AGENCY (LOSSAN)

## **Introduction**

Recognizing the critical need to improve the safety, reliability, capacity, and customer experience along the rail corridor between San Diego and San Luis Obispo, the LOSSAN rail corridor agency was formed in 1989. Known as Amtrak's *Pacific Surfliner* corridor, it is the second busiest intercity passenger rail corridor nationwide and Amtrak's fastest growing. One in every nine Amtrak passengers uses the *Surfliner* corridor. LOSSAN's member agencies represent rail owners, operators, and regional planning agencies along the entire six-county, 351-mile corridor. A LOSSAN Joint Powers Board membership roster is provided as Attachment 1.

LOSSAN and its member agencies have a history of providing capital and operating funds to the rail service along the entire corridor. The State of California has provided more than \$1 billion in improvements, Amtrak has contributed \$200 million, and local agencies have contributed \$300 million in the corridor since the 1970s.

The LOSSAN Joint Powers Board meets quarterly and the Technical Advisory Committee (TAC), comprised of staff from member and advisory agencies, meets generally every other month. SANDAG is staff to the LOSSAN Board and TAC. A summary of the January 7, 2004, Board of Directors meeting is provided as Attachment 2.

At the LOSSAN Board's direction, over the next few months LOSSAN representatives will visit each member agency, as well as other related agencies in the state, to provide an update on the coastal rail corridor as well as the future role for LOSSAN. Representatives from the LOSSAN Board of Directors and the TAC will provide this update to the Transportation Committee.

## **Recommendation**

The Transportation Committee is asked to: (1) support LOSSAN efforts to improve the coastal rail corridor; and (2) continue to make conventional rail improvements along the coastal rail corridor a regional priority.

## **Discussion**

### *SANDAG Actions Related to LOSSAN Board Actions*

LOSSAN continues to advocate for capital and operational improvements to the rail corridor. In the past, LOSSAN has secured critical federal funding for the Solana Beach Grade Separation Project and the Del Mar Bluffs Stabilization Project. Currently, key rail projects in the San Diego region that are part of SANDAG's federal legislative program also are priority projects for LOSSAN. These are the Solana Beach Transit Station Parking Structure, Santa Margarita River Bridge Replacement and Second Track Project, Del Mar Bluffs Stabilization, and other corridor improvement projects.

### *Future Plans for Coastal Rail Improvements*

On March 4 and March 5, 2004, respectively, SANDAG's Regional High-Speed Rail Task Force and Transportation Committee reviewed the draft Programmatic Environmental Impact Report/Environmental Impact Statement (PEIR/EIS) released by the California High-Speed Rail Authority (Authority) for the proposed California high-speed train system. This document identifies high-speed service along the LOSSAN corridor from Los Angeles to Orange County. (San Diego also would be connected to this high-speed system via the Inland Interstate 15 [I-15] Corridor.)

Since the Authority's High-Speed Train Alternative would extend no further south than Irvine in Orange County, conventional improvements to the coastal rail corridor are proposed. Caltrans is the state lead agency for a separate PEIR/EIS that considers conventional improvements to the LOSSAN corridor, since Caltrans would be a primary agency responsible for those improvements. Caltrans is using the same technical data used for the high-speed rail PEIR/EIR. The draft of the Caltrans corridor document is tentatively scheduled for release in May 2004, following the close of public comment on the Authority's statewide document. The Transportation Committee will review this corridor-wide document upon its draft release. The intent is that this document will be used by SANDAG, North County Transit District (NCTD), Caltrans, and Amtrak as the basis for future capital improvements in the coastal rail corridor.

BOB LEITER

Director of Land Use and Transportation Planning

Attachments

Staff Contact: Linda Culp, (619) 699-6957; lcu@sandag.org

# LOSSAN

(LOS ANGELES–SAN DIEGO–SAN LUIS OBISPO RAIL CORRIDOR AGENCY)

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## MEMBERSHIP

*This board is composed of current and former elected officials representing rail owners, operators, and planning agencies along Amtrak's Pacific Surfliner corridor between San Diego and San Luis Obispo. LOSSAN is staffed by SANDAG. The objective of the agency is to coordinate planning and programs that increase ridership, revenue, reliability, and safety on the coastal rail line from San Luis Obispo to Los Angeles to San Diego.*

*The Los Angeles - San Diego – San Luis Obispo Rail Corridor Agency meets every quarter.*

*Staff contact: Linda Culp  
(619) 595-5357; lcu@sandag.org*

### MEMBERS

**Chair: Arthur Brown**

Orange County Transportation Authority

**Vice Chair: Jacki Bacharach**

Los Angeles County Metropolitan Transportation Authority

**Julianne Nygaard**

North County Transit Development Board

**Chris Norby**

Orange County Transportation Authority

**Beatrice Proo**

Los Angeles County Metropolitan Transportation Authority

**Jerry Rindone**

San Diego Metropolitan Transit System

**Joe Kellejian**

San Diego Association of Governments

**Bill Davis**

Ventura County Transportation Commission

**Joni Gray**

Santa Barbara County Association of Governments

**Peg Pinard**

San Luis Obispo Council of Governments

**Warren Weber**

Caltrans, Division of Rail

### ALTERNATES

**Harry Mathis**

San Diego Metropolitan Transit Development Board

**Brian Humphrey**

Ventura County Transportation Commission

**Susan Rose**

Santa Barbara County Association of Governments

**Fred Munroe**

San Luis Obispo Council of Governments

**Ann Kulchin**

North County Transit Development Board

### Ex Officio Member

**Richard Dixon**

Southern California Association of Governments

### Additional Technical Advisory Committee Members

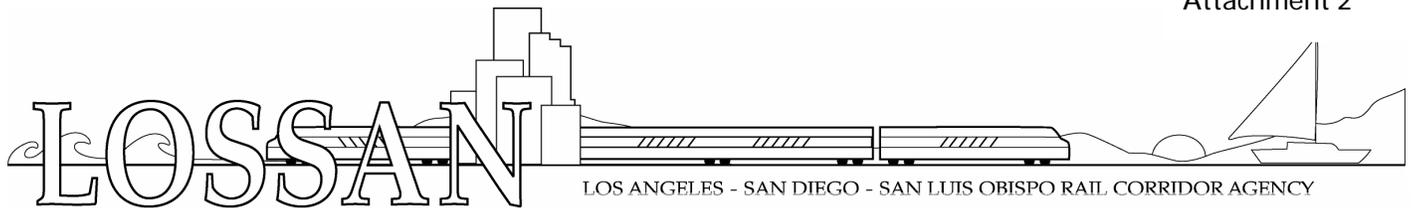
Amtrak

Burlington Northern Santa Fe

California Public Utilities Commission

Southern California Regional Rail Authority

Union Pacific



## *Board Actions: January 2004*

### MEMBER AGENCIES

*California Department of  
Transportation*

*Los Angeles County Metropolitan  
Transportation Authority*

*North San Diego County Transit  
Development Board*

*Orange County Transportation  
Authority*

*San Diego Association of  
Governments*

*San Diego Metropolitan Transit  
Development Board*

*San Luis Obispo Council of  
Governments*

*Santa Barbara County Association  
of Governments*

*Ventura County Transportation  
Commission*

### EX-OFFICIO MEMBER

*Southern California Association of  
Governments*

### ADDITIONAL TECHNICAL ADVISORY COMMITTEE MEMBERS

*Amtrak*

*Burlington Northern Santa Fe*

*California Public Utilities  
Commission*

*Southern California Regional Rail  
Authority*

*Union Pacific*

### STAFFED BY:

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San Diego CA 92101  
(619) 595-5300  
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lcu@sandag.org*

### SELECTION OF 2004 CHAIR AND VICE CHAIR

The Board of Directors elected Art Brown, Councilmember from the City of Buena Park, and LOSSAN Board Member representing OCTA, as chair for 2004. Ms. Jacki Bacharach, Board Member representing MTA will remain as vice chair for 2004.

### LOSSAN ROAD SHOW

The Board approved a slide presentation and accompanying script that discusses the LOSSAN Corridor and the role of the LOSSAN Rail Corridor Agency to be presented to member agencies and other interested groups and directed staff to schedule these meetings over the next few months.

### LEGISLATIVE SUPPORT

The Board of Directors approved the Technical Advisory Committee's (TAC) recommendation to develop five criteria that are key to LOSSAN's support of federal legislation related to rail capital and operations. These criteria are: (1) proposals address the future of Amtrak and specifically a stable, multi-year funding source, (2) proposals include a separate rail capital and/or operating program for a long-term source of federal funds for rail, (3) any such rail program has a dedicated funding source and does not impact earmarks such as the highway trust fund, (4) there is geographic equity between all corridors nationwide, and (5) there is a diversity of rail projects eligible for funding. The TAC will continue to review the relevant legislation, and along with the Chair and Vice Chair, submit LOSSAN's support where applicable.

### LOSSAN JOINT MEETING WITH THE COAST RAIL COORDINATING COUNCIL

The LOSSAN Board of Directors also held a joint meeting with the Policy Committee of the Coast Rail Coordinating Council (CRCC), a coastal rail advocacy group of agencies between Los Angeles and San Francisco. As a result of the discussion on potential state budget impacts, reauthorization of the federal surface transportation bill (TEA-21), and other federal legislation, both LOSSAN and CRCC jointly voted to write letters to bill co-sponsors, the corridor delegation, and the State of California to express our issues with each effort.

Members also voted to send a joint letter to Amtrak and the State to express support for an additional round trip to San Luis Obispo, on top of the one round trip currently provided on weekdays. Amtrak is currently looking at the operational details of this additional service.

### **CORRIDORWIDE STRATEGIC PLAN DEVELOPMENT**

Caltrans provided an informational update on the LOSSAN Strategic Plan, a long-range plan for the Los Angeles to San Diego segment of the corridor recently finalized. This plan was conducted in conjunction with both the California High-Speed Rail Authority's statewide programmatic environmental impact report/environmental impact statement (PEIR/EIS) and Caltrans Los Angeles to San Diego corridorwide PEIR/EIS efforts. The Strategic Plan is available on [www.amtrakcalifornia.com](http://www.amtrakcalifornia.com). TAC members will continue to discuss efforts to expand this plan for the entire LOSSAN corridor in FY 2005 at their January 27, 2004 meeting.

### **PACIFIC SURFLINER REPORT**

Amtrak reported on recent trends in corridor ridership and revenue. The Pacific Surfliner corridor is the fastest growing corridor nationwide. Statistics for November 2003 show that it was the highest November ridership in the history of the service with gains in both business and coach class.

Amtrak continues to see gains in ridership from the Rail-2-Rail program, a joint venture with Metrolink and Caltrans that allows Metrolink riders to use Amtrak trains at no additional charge. Board and TAC members discussed the possible expansion of the program to Coaster service, with NCTD, Amtrak, and Caltrans currently working on the details.

### **NEXT MEETINGS**

The LOSSAN TAC will next meet on Tuesday, January 27, 2004.

The Board approved the next two Board meetings for 2004: Wednesday, May 12, 2004 at MTA and Wednesday, September 15, 2004 at SANDAG (and plans to hold a meeting in 2005 in the northern segment of the corridor).

The Board asked staff to reschedule the December 2004 meeting to an earlier date in November and report back.