# SANBAG County-Wide Transit Efficiency Study

Agency Assessment Report



# SANBAG

# County-wide Transit Efficiency Study Task 1.5—Agency Assessment Report September 17, 2015

Prepared for: SANBAG

Prepared by: Parsons Brinckerhoff

# **Table of Contents**

1.0	INTRO	DUCTI	ON AND STUDY PURPOSE	1-1
2.0	<b>TRAN</b> 2.1	<b>SPORT</b> Local 2.1.1 2.1.2 2.1.3 2.1.4 2.1.5 2.1.6	ATION PROVIDERS AND AGENCIES         Transit         Barstow Area Transit         Morongo Basin Transit Authority         Mountain Area Regional Transit Authority         City of Needles         Omnitrans         Victor Valley Transit Authority	2-1 2-1 2-9 2-17 2-26 2-30 2-44
	2.2	Other 2.2.1 2.2.2	Transportation Agencies SANBAG Valley Transportation Services	2-55 2-55 2-58
3.0	FUNC	TIONAI	LASSESSMENT OF THE TRANSIT AGENCIES	3-1
	3.1	Agenc	y Overview	3-1
	3.2	Currer	nt Transit Services Provided	3-5
	3.3	Servic	e Planning	3-6
	3.4	Opera	tions and Administrative Support Functions	3-8
	3.5	Manag	gement Information Systems/Information Technology	3-9
	3.6	Fixed	Asset Review	3-10
4.0	PERF	ORMAN	ICE REVIEW OF THE TRANSIT AGENCIES	4-1
	4.1	Standa	ardized Performance Review on Key Indicators	4-2
		4.1.1	Barstow Area Transit	4-4
		4.1.2	Morongo Basin Transit Authority	4-6
		4.1.3	Mountain Area Regional Transit Authority	4-7
		4.1.4	City of Needles	4-8
		4.1.5	Omnitrans	4-10
		4.1.6	Victor Valley Transit Authority	4-11
	4.2	Interna	al Agency Performance Review	4-14
		4.2.1	Barstow Area Transit	4-14
		4.2.2	Morongo Basin Transit Authority	4-14
		4.2.3	Mountain Area Regional Transit Authority	4-16
		4.2.4	City of Needles	4-21
		4.2.5	Omnitrans	4-22
		4.2.6	Victor Valley Transit Authority	4-24
	4.3	Peer A	Agency Performance Review.	4-29
		4.3.1	Barstow Area Transit Peer Review	4-31
		4.3.2	Morongo Basin Transit Authority Peer Review	4-35
		4.3.3	Mountain Area Regional Transit Authority Peer Review	4-40
		4.3.4	City of Needles Peer Review	4-45
		4.3.1	Omnitrans Peer Review	4-46
		4.3.2	Victor Valley Transit Authority Peer Review	4-51
	4.4	Summ	ary, Conclusions, and Recommendations	4-58
		4.4.1	Barstow Area Transit	4-58
		4.4.2	Morongo Basin Transit Authority	4-58
		4.4.3	Mountain Area Regional Transit Authority	4-59
			-	

		4.4.4 City of Needles	4-61
		4.4.5 Omnitrans	4-61
		4.4.6 Victor Valley Transit Authority	4-62
5.0	FINAN	ICIAL REVIEW	. 5-1
	5.1	Methodology	. 5-1
	5.2	Strategy Evaluations	. 5-5
		5.2.1 High-Level Potential Cost Saving Items	. 5-5
		5.2.2 Low- to Mid-Level Potential Cost Saving Items	5-25
		5.2.3 Items without Major Cost Savings but Likely to Improve Services	5-33
	5.3	Financial Review Conclusions	5-44

# List of Figures

Figure 1-1.	San Bernardino County by Subarea	1-3
Figure 2-1.	BAT Revenue Vehicle	2-6
Figure 2-2.	BAT Maintenance Facility	2-7
Figure 2-3.	MBTA Revenue Vehicle	2-14
Figure 2-4.	MBTA CNG Facilities	2-14
Figure 2-5.	MBTA Facility	2-15
Figure 2-6.	MARTA Revenue Vehicle	2-23
Figure 2-7.	MARTA Big Bear Facility	2-24
Figure 2-8.	Omnitrans' New sbX Service	2-31
Figure 2-9.	Omnitrans sbX Revenue Vehicle and Fleet in Yard	2-40
Figure 2-10.	Omnitrans CNG Fuel	2-41
Figure 2-11.	Omnitrans East Valley Facility	2-42
Figure 2-12.	VVTA Revenue Vehicle	2-52
Figure 2-13.	VVTA CNG Fuel	2-53
Figure 2-14.	VVTA Facility	2-53
Figure 2-15.	VVTA Repair Shop	2-54
Figure 2-16.	SANBAG Management	2-57
Figure 2-17.	VTrans Leased Maintenance Facility	2-61
Figure 4-1.	BAT Cost and Financial Efficiency Performance Comparison	4-33
Figure 4-2.	BAT Service Effectiveness Performance Comparison	4-34
Figure 4-3.	BAT Cost Effectiveness Performance Comparison	4-35
Figure 4-4.	MBTA Cost and Financial Efficiency Performance Comparison	4-37
Figure 4-5.	MBTA Service Effectiveness Performance Comparison	4-38
Figure 4-6.	MBTA Cost Effectiveness Performance Comparison	4-39
Figure 4-7.	MARTA Cost and Financial Efficiency Performance Comparison	4-42
Figure 4-8.	MARTA Service Effectiveness Performance Comparison	4-43
Figure 4-9.	MARTA Cost Effectiveness Performance Comparison	4-44

Figure 4-10.	City of Needles Service Effectiveness Performance Comparison	4-45
Figure 4-11.	Omnitrans Cost and Financial Efficiency Performance Comparison	4-49
Figure 4-12.	Omnitrans Service Effectiveness Performance Comparison	4-50
Figure 4-13.	Omnitrans Cost Effectiveness Performance Comparison	4-51
Figure 4-14.	VVTA Cost and Financial Efficiency Performance Comparison	4-55
Figure 4-15.	VVTA Service Effectiveness Performance Comparison	4-56
Figure 4-16.	VVTA Cost Effectiveness Performance Comparison	4-57

# List of Tables

Table 1-1.	Measure I Funding Allocation by Subarea	1-3
Table 2-1.	BAT Fares	2-3
Table 2-2.	BAT Staffing	2-4
Table 2-3.	BAT Fleet: Revenue Vehicles	2-5
Table 2-4.	BAT Fleet: Non-revenue Vehicles	2-6
Table 2-5.	MBTA Fares	2-11
Table 2-6.	MBTA Staffing	2-12
Table 2-7.	MBTA Fleet: Revenue Vehicles	2-13
Table 2-8.	MBTA Fleet: Non-revenue Vehicles	2-13
Table 2-9.	MARTA Fares	2-19
Table 2-10.	MARTA Staffing	2-21
Table 2-11.	MARTA Fleet: Revenue Vehicles	2-22
Table 2-12.	MARTA Fleet: Non-revenue Vehicles	2-23
Table 2-13.	NTS Fares	2-27
Table 2-14.	NTS Staffing	2-28
Table 2-15.	NTS Revenue Fleet Vehicles	2-29
Table 2-16.	Omnitrans Fares	2-33
Table 2-17.	Omnitrans Staffing	2-34
Table 2-18.	Omnitrans Fleet: Revenue Vehicles	2-39
Table 2-19.	Omnitrans Fleet: Non-revenue Vehicles	2-40
Table 2-20.	VVTA Fares	2-47
Table 2-21.	VVTA Staffing	2-49
Table 2-22.	VVTA Fleet: Revenue Vehicles	2-51
Table 2-23.	VVTA Fleet: Non-revenue Vehicles	2-52
Table 2-24.	VTrans Staffing	2-60
Table 3-1.	Agency Overview	3-15
Table 3-2.	Current Transit Services Provided	3-18
Table 3-3.	Service Planning	3-21
Table 3-4.	Operations and Administrative Support Functions	3-23

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

Table 3-5.	Management Information Systems/Information Technology	3-25
Table 3-6.	Fixed Asset Review	3-27
Table 4-1.	Transit Operator Fixed Route Service Performance: Actual (2013)	4-3
Table 4-2.	Transit Operator Demand Response Service Performance: Actual (201	3) 4-4
Table 4-3.	BAT Performance: Actual (2013)	4-5
Table 4-4.	MBTA Performance: Actual (2013)	4-7
Table 4-5.	MARTA Performance: Actual (2013)	4-8
Table 4-6.	City of Needles Performance: Actual (2013)	4-9
Table 4-7.	Omnitrans Performance: Actual (2013)	4-10
Table 4-8.	VVTA Performance: Actual (2013)	4-13
Table 4-9.	MBTA Performance: Actual (2013) Compared to Standard	4-15
Table 4-10.	MARTA Performance: Actual (2013) Compared to Standard	4-19
Table 4-11.	City of Needles Performance: Actual (2013) Compared to Standard	4-21
Table 4-12.	Omnitrans Performance: Actual (2013) Compared to Standard	4-23
Table 4-13.	VVTA Performance (Weekday): Actual (2013) Compared to Standard	4-25
Table 4-14.	VVTA Performance (Saturday): Actual (2013) Compared to Standard	4-26
Table 4-15.	BAT Performance: Peer Comparison	4-32
Table 4-16.	MBTA Performance: Peer Comparison	4-36
Table 4-17.	MARTA Performance: Peer Comparison	4-41
Table 4-18.	City of Needles Performance: Peer Comparison	4-45
Table 4-19.	Omnitrans Performance: Peer Comparison	4-47
Table 4-20.	VVTA Performance: Peer Comparison	4-53
Table 5-1.	Strategies Identified for Study of Cost Savings or Coordination	5-2
Table 5-2.	4-Year Cost Savings, High-Level Potential Cost Saving Strategies	5-4
Table 5-3.	4-Year Joint Bus Procurement Costs and Savings, Compared to Individual Agency Procurement	5-6
Table 5-4.	Comparison of Certification Rates with Omnitrans' Paper-Based ADA Certification Program and VVTA's ADARide Program	5-8
Table 5-5.	Comparison of Certification Costs per Applicant under Omnitrans' Paper-Based ADA Certification Program and VVTA's	5.0
Table 5 6	ADA Repretenzation Contraction Applicante and	
	Potential Savings from Improved Certification Processes	5-10
Table 5-7.	Current Interested Transit Agency Paratransit Program Performance*	5-12
Table 5-8.	Analysis of Directly Contracted/Reimbursed Taxi Cost	5-12
Table 5-9.	Analysis of Taxi Voucher Program - 50 percent Farebox Return	5-13
Table 5-10.	Participating Agency Bus Heavy Overhaul and Repair Costs and Projected Savings Over a 4-Year Period	5-16
Table 5-11.	Participating Agency Bus Parts Costs and Projected Savings Over a 4-Year Period	5-17
Table 5-12.	Participating Agency Tire Costs, Procurement Methods, and	
	Projected Savings Over a 4-year Period	5-19

Table 5-13.	Participating Agency CNG fuel Costs and Projected Savings Over	
	a 4-Year Period	. 5-21
Table 5-14.	Estimated Cost Savings of using CNG vs. LCNG for the Omnitrans	
	West Valley Facility	. 5-24

# **List of Appendices**

- APPENDIX A. REFERENCES
- APPENDIX B. QUESTIONNAIRE
- APPENDIX C. SITE VISIT MEETING SUMMARIES
- APPENDIX D. AGREEMENT/MOU TEMPLATES

# THIS PAGE INTENTIONALLY LEFT BLANK

# 1.0 INTRODUCTION AND STUDY PURPOSE

San Bernardino County is the largest county in geographic area in the contiguous United States, with areas that vary from relatively dense urban concentrations to rural communities and undeveloped desert and mountain landscapes. Like the county they are located in, the seven transit operator/agencies in San Bernardino County vary widely in size and nature of the transit services provided. However, all are in the business of moving people by public transit efficiently and economically. The purpose of the San Bernardino Associated Governments (SANBAG) County-wide Transit Efficiency Study is to conduct a study of the seven transit operators/agencies in San Bernardino County in order to identify potential cost efficiencies that can be achieved through coordination and joint efforts among the transit agencies and SANBAG. An additional goal is to improve transit services for current and new transit users through better coordination among the operators and SANBAG.

It is important to note that the focus of this study is a *functional* assessment of the transit agencies. The study performs a detailed functional assessment of each agency's operational and administrative functions, systems, and assets, and identifies commonalities among the agencies that point to potential improved efficiencies through coordination or combined efforts. The focus is <u>not</u> a study of consolidation of agencies into SANBAG or among themselves, unless the agencies themselves see benefit to such consolidation.

Task 1 of the study is to conduct a Transit Agency Assessment in order to identify the areas of potential opportunities for efficiency. This was done using the following three approaches:

- Document Review The consultant team reviewed available information on each transit agency from documents such as Annual Budgets, Short-Range Transit Plans, Long Range Transit Plans, Comprehensive Operational Analyses, and agency websites.
- Transit Agency Functional Assessment Questionnaire The consultant team developed a detailed Functional Assessment Questionnaire which solicits information from each agency on how they functionally organize and operate the services they provide.
- Site Visits Following distribution of the Questionnaire, the consultant team conducted site visits of each agency to expand on the information requested in the Questionnaire and to directly discuss opportunities for improved efficiencies as seen by the agencies.

The Questionnaire and the site visits were structured around obtaining information on the following six key areas:

• Agency overview – Agency origin, legislative basis, and areas represented/served.

- Current transit services provided The range of services each agency provides, as well as methods of service delivery, operational contracts, and staffing.
- Service Planning Size, scope, and nature of the current service planning effort conducted by each agency. This information will support the parallel SANBAG Short-Range Transit Plan study being conducted concurrently with this study.
- Operations and Administrative Support Functions How these support functions are organized and staffed.
- Management Information Systems/Information Technology Assessment of these areas for possible commonalities and potential efficiencies.
- Fixed Asset Review Review of each agency's vehicle fleets and other major assets for possible savings through combined procurement and/or maintenance programs.

Once all the information on transit agency functions was obtained, it was arrayed in matrices in order to compare and contrast each agency and identify areas of commonality in preparation for the next step in the study.

#### Background on San Bernardino County

San Bernardino County is the largest county in geographic area in the contiguous United States and encompasses over 20,000 square miles. A geographic region that size includes a great amount of diversity from urbanized cities to mountain resort areas and scattered rural communities. The east and west San Bernardino Valleys along with the Victor Valley in the high desert are home to 91.1 percent of the county's population and is a more urbanized setting. The remaining 8.9 percent of the county's population is spread across mountain and desert communities. San Bernardino County's desert open spaces are home to unique uses such as Joshua Tree National Park, the Mojave National Preserve and national military training centers at Twentynine Palms and Ft. Irwin. (SANBAG, 2013)

Of the county's 2.06 million people, 85.7 percent live in one of 24 incorporated cities/towns and 14.3 percent live in unincorporated areas of the County of San Bernardino. Six of the 24 cities have a population of over 100,000 people. (SANBAG, 2013)

Measure I, the County-wide voter approved half-cent transportation transactions and use tax, is estimated to generate almost \$4.5 billion through 2040 for funding of major freeway construction, commuter rail service, express bus/bus rapid transit service, local street and road improvements, special transit service for the elderly and disabled population, and traffic management and environmental enhancement efforts. Measure I divided San Bernardino into seven subareas for purposes of tax revenue administration and funding allocation, reflecting the relative population of the subareas, as shown in Table 1-1 and Figure 1-1.



Figure 1-1. San Bernardino County by Subarea

Source: SANBAG, 2012a

Subarea	Percentage*
Cajon Pass <sup>1</sup>	2.8%
Colorado River	0.2%
Morongo Basin	2.2%
Mountains	1.6%
North Desert	2.8%
San Bernardino Valley	77.2%
Victor Valley	13.2%

Table 1-1. Measure I Funding Allocation by Subarea

Source: SANBAG, 2012a

Notes: \*Percentages are adjusted annually based on actual revenue.

<sup>&</sup>lt;sup>1</sup> Per the Measure I Expenditure Plan, Cajon Pass receives a separate funding allocation though not specifically identified on the Subareas Boundary Map.

The transit agencies reviewed in this study each operate within one of these subareas, though some also provide connecting services into other subareas or into Riverside County.

#### **Report Organization**

Section 2 of this *Agency Assessment Report* provides an overview of the public transportation providers and other public transportation agencies in San Bernardino County in order to understand their relative size, scale and methods of service delivery, and resources.

Section 3 provides a functional assessment of the transit agencies based on the six key areas of the Questionnaire, utilizing comparison matrices with supporting written analysis of the findings.

Section 4 provides a performance review of the transit agencies, utilizing standardized performance indicators, each agency's own goals/objectives, and a Peer Agency Performance Review, to gauge how each agency is doing in providing transit services.

Section 5 provides a Financial Review of the agencies, evaluating potential cost savings and service coordination strategies that were identified during the previous phases of the study.

The Appendix includes a list of references used to prepare this study, the Functional Assessment Questionnaire used to obtain agency information, meeting summaries from each of the site visits conducted with the transit agencies, and draft Agreement/Memorandum of Understanding templates which can be used by the agencies to jointly pursue the cost savings and service coordination strategies.

# 2.0 TRANSPORTATION PROVIDERS AND AGENCIES

This chapter discusses public transportation providers in San Bernardino County, which includes six local transit providers, one regional transportation agency (the San Bernardino Associated Governments [SANBAG]), and one consolidated transportation services agency (CTSA). As noted in the San Bernardino County Long Range Transit Plan (SANBAG, 2009b), the transit routes of these providers cover less than 10 percent of the land area of the county, but provide service to more than 90 percent of the population of the county.

# 2.1 Local Transit

There are six local transit providers in San Bernardino County: Barstow Area Transit (BAT), Morongo Basin Transit Authority (MBTA), Mountain Area Regional Transit Authority (MARTA), the City of Needles, Omnitrans, and Victor Valley Transit Authority (VVTA). These local transit providers are described in more detail below.

# 2.1.1 Barstow Area Transit

BAT serves west San Bernardino County, within the North Desert Subarea (Figure 1-1). BAT provides service to the City of Barstow and nearby areas of San Bernardino County (e.g., Hinkley and Newberry Springs). The BAT service area includes a population of 40,000 people and covers 653 square miles (SANBAG, 2009a).

# 2.1.1.1 Agency

BAT is administered by the City of Barstow, which has a council-manager form of government consisting of five city council representatives, including the mayor. The Barstow City Council approves budgets, fare adjustments, service changes, and federal and state grant applications. BAT services were initiated in 1994.

As this study was getting underway, BAT was in the process of merging with VVTA. However, this study will review BAT as a separate agency for purposes of cost efficiency opportunities.

# 2.1.1.2 Services

BAT utilizes a hub-and-spoke transit model, providing fixed route service in the downtown area. Demand response service (i.e., dial-a-ride [DAR] and Americans with Disabilities Act [ADA] paratransit) services are also provided both in the city and nearby areas of the county (SANBAG, 2014a).

In addition to BAT service, BAT contracts with the Trona Community Senior Center and the Bonnie Baker Senior Citizens Club (Big River) to provide local DAR service to seniors and persons with disabilities within the Trona and Big River areas, respectively.

# Routes

General public service is provided on "City Fixed Route" and "County DAR" services, and ADA paratransit service is provided on "City DAR" services, as described below.

"City Fixed Route" service is provided every hour on three fixed routes (Routes 1, 2, and 3), within the city and nearby areas of the county. Complementary "City DAR" service is provided to seniors and persons with disabilities within the ADA service area (i.e., 3/4-mile on either side of an existing fixed route). Service hours are Monday to Friday (7:00 a.m. to 7:00 p.m.), Saturday (9:00 a.m. to 5:00 p.m.), and Sunday (8:00 a.m. to 4:00 p.m.).

"County DAR" service is provided in two zones (in nearby areas of the county where fixed-route service is not provided). In each zone, service is operated in three to four time blocks each day, as follows: Monday to Friday (7:00 a.m., 10:00 a.m., 1:00 p.m., and 4:00 p.m.), Saturday (9:00 a.m., 12:00 p.m., and 3:00 p.m.), and Sunday (8:00 a.m., 11:00 a.m., and 2:00 p.m.).

As discussed in Section 2.1.6.2, VVTA operates "B-V Link" service between Barstow, Victor Valley, and San Bernardino Valley, and "National Training Center (NTC) Commuter" service from Barstow to Fort Irwin. For additional details on these services, see Section 2.1.6.2.

#### Annual System Ridership

In 2013, BAT served 188,600 trips on the fixed routes and 20,400 demand response trips (SANBAG, 2014a).

#### Fares

The BAT fare structure is shown in Table 2-1. Generally, fares are dependent upon the service type, with reduced fares offered to seniors (60 years and over), persons with disabilities, youth (6-17 years), and Barstow Community College students. Additionally, children 5 years and under are free (up to three children per paying adult). Cash for the exact price (for each individual trip), or a pass, is required for the selected service.

BAT also works with VVTA, allowing transfers between BAT's "City Fixed Route" service and VVTA's "B-V Link" service.

#### Contact Information

Questions, comments, and complaints regarding BAT services can directed to MV Transportation, Inc. by telephone (760-255-3330) or online forms (http://www.mvtransit.com/contact/passenger-comments). Other questions, comments, and complaints can be directed to the City of Barstow Transportation Department by telephone (760-255-5170) or in person at Barstow City Hall.

*Office Address* Barstow City Hall 220 E. Mountain View Street, Suite A Barstow, CA 92311

Service Type	Rider Type	Fare Type	Price
		Cash Fare	\$1.25
	Full Fare	1-Day Pass	\$4.00
Service Type         City Fixed Route         County DAR         City DAR		Monthly Pass	\$43.00
		Cash Fare	\$0.65
City Fixed Route	Seniors/Disability	1-Day Pass	\$2.00
		Monthly Pass	\$21.00
		Cash Fare	\$1.00
	Youth/Students	1-Day Pass	\$3.00
		Monthly Pass	\$38.00
		Cash Fare	\$2.75
	Full Fare Youth/Students	1-Day Pass	\$9.00
		Monthly Pass	\$78.00
County DAR		Cash Fare	\$1.25
	Seniors/Disability	1-Day Pass	\$4.50
		Monthly Pass	\$30.25
		Cash Fare	\$1.85
City DAR	ADA Certification	1-Day Pass	\$8.50
		Monthly Pass	\$30.00
DAR – Trona and Big River	Seniors/Disability	No cash fare but passengers are asked to cover fuel cost	-

Table 2-1. BAT Fares

Source: BAT, 2014

Notes: ADA = Americans with Disability Act; DAR = Dial-a-Ride

# 2.1.1.3 Management

The City of Barstow Transportation Department (i.e., the Transportation Manager) oversees the day-to-day management of BAT, including the operations and management contract held by MV Transportation, Inc. The Transportation Manager also is responsible for planning, with administration support provided by other city departments, such as the finance department. All other staffing is provided by the contractor.

Staffing for the system is shown in Table 2-2.

Function	Staff	# of Positions		
Management	Transportation Manager	1		
	Subtotal	1		
	City of Barstow Total	1		
Management (Contractor)	General Manager	1		
	Administrative Assistant	1		
	Subtotal	2		
Administrative (Contractor)	Safety/Operations Manager	1		
	Dispatcher	3		
	Maintenance Manager			
	Subtotal	5		
Operations and	Drivers (Full-time)	22		
Maintenance (Contractor)	"A" Mechanic	1		
	Utility Worker	1		
	24			
	Contractor Total	31		
City of Barstow and Contractor Total 32				

Table 2-2. BAT Staffing

Source: SANBAG, 2014a

# 2.1.1.4 Assets

#### **MIS/Information Technology**

BAT does not currently have an Information Systems Master Plan or documented decision making process for IT systems. BAT vehicles are not equipped with GPS devices and the agency does not track its vehicles with automatic vehicle locator (AVL) systems. Therefore, technologies or information systems that rely on AVL, such as Real Time Information (RTI), are not available. Excel spreadsheets are used to track on-time performance and ridership data collected by drivers. BAT does not coordinate data or information exchange with other agencies or transportation providers, except for their entry of operational data into TransTrack for access by SANBAG staff. BAT's IT department had \$3,632 allocated for FY 12/13. The agency's use of computers is limited and is not networked. BAT does not employ specific IT staff.

MV uses Fleet Focus, corporate-wide, to record and track vehicle maintenance and inventory activities. MV IT support is provided in-house.

Fare collection is performed by MV. Seven (7) BAT buses are equipped with GFI "Cents-a-Bill" fareboxes. They are used only for fare collection and no ridership data is provided from the GFI system.

#### Fleet

The revenue fleet is comprised of 20 cut-a-way vehicles, using Ford and Chevrolet chassis, ranging in length from 22-33 feet (see Figure 2-1 for a typical vehicle). The fuels used are gasoline and compressed natural gas (CNG). The one shop truck uses gasoline. These vehicles are shown in Table 2-3 and Table 2-4.

Revenue vehicles can be purchased through CalACT and non-revenue vehicles are purchased through a state contract.

Quantity	Manufacturer	Vehicle Year	Vehicle Length	Fuel Type	Vehicle Function	Peak Pull-out Requirement
3	El Dorado Aero Elite 270	2007	28'	Gasoline	Fixed Route Demand Response	2
2	Starcraft Allstar Type II Paratransit Bus	2008	22'	Gasoline	Demand Response	2
8	Ford BU	2008	22'	Gasoline	Demand Response	6
2	Glaval Titan	2009	28'	CNG	Fixed Route	2
2	Glaval Titan	2008	28'	CNG	Fixed Route	2
3	Goshen G Force	2011	33'	CNG	Fixed Route	3
Total						
20						17

Table 2-3. BAT Fleet: Revenue Vehicles

Source: SANBAG, 2014a

Notes:

CNG = compressed natural gas

Quantity	Manufacturer	Vehicle Year	Fuel Type	Vehicle Function
1	Ford E250	1999	Gasoline	Shop
Total				
1				

#### Table 2-4. BAT Fleet: Non-revenue Vehicles

Source: SANBAG, 2014a

#### Figure 2-1. BAT Revenue Vehicle



#### Fuel

There are no fueling capabilities at the maintenance facility. CNG is obtained from the City of Barstow at wholesale price. The city's liquefied natural gas (LNG)-supplied fueling station is located approximately 8 miles from the facility, where LNG-CNG conversion equipment converts the fuel to CNG and fills the buses. Clean Energy supplies the fuel from Boron, CA and Alt Energy maintains the station.

#### Facilities

BAT operates from a single facility comprised of a single steel-on-frame building containing three maintenance bays with one floor mounted post lift as depicted in Figure 2-2. The facility is leased by the city at an annual cost of approximately \$50,000. The ceiling restricts the height that vehicles can be lifted and the bays and lift capacity restrict the length and weight of vehicles that can be accommodated. The third bay has a flat floor and could accommodate a 40' bus; however, access into the bay is awkward, as the vehicle must traverse a 90-degree turn from the entrance. There is no on-site fueling or drive through bus wash. There is parking space to accommodate more than the 20 vehicles currently assigned.



Figure 2-2. BAT Maintenance Facility

Bay with floor mounted post lift



Long bay requires 90 degree turn



Additional parking space available

Other Assets and Resources

2.1.1.5 Maintenance

There are two mechanics to perform all in-house facility and vehicle maintenance. The Maintenance Manager is a working mechanic.

Maintenance training is provided through MV corporate/internal sources.

Facilities

Facility maintenance is the responsibility of MV. MV performs preventative and repair maintenance and uses local contractors as necessary for major or complex repairs. MV pays the landlord to perform landscaping services. Environmental waste and lighting repair are contracted.

#### Vehicles

MV's contract is inclusive of all labor, parts and materials associated with vehicle maintenance. Most parts and materials are procured through MV national accounts. Body parts are supplied by Creative Bus Sales. Car Quest is used to procure parts and materials as necessary. The average inventory value is approximately \$30,000.

MV performs preventative and repair maintenance to include engine and transmission replacements. Some of the vehicles in service are beyond their useful life. For those vehicles, MV is paid an additional \$0.15 for each operated mile. Body and paint services are provided by American Bus Repair (ABR), an MV subsidiary.

Vehicle towing, as required, is provided through local resources.

Maintenance practices and procedures are documented and are in accordance with OEM, and statutory requirements.

#### Bus Stop Signs and Shelters

Signs and shelters are purchased and maintained by the city. The city contracts their installation.

# 2.1.2 Morongo Basin Transit Authority

MBTA serves south San Bernardino County, within the Morongo Basin Subarea (Figure 1-1). MBTA provides service to the City of Twentynine Palms, the Town of Yucca Valley, the unincorporated community of Joshua Tree, and nearby areas of San Bernardino County (e.g., Marine Corps Air Ground Combat Center [MCAGCC], Landers, and Morongo Valley). In 2010, Twentynine Palms, Yucca Valley, and Joshua Tree had a combined population of 53,162 people and a combined area of 136 square miles (U.S. Census, 2014).

# 2.1.2.1 Agency

MBTA is a Joint Powers Authority (JPA), formed in 1991, governed by a seven-member board consisting of two council representatives from Twentynine Palms, two council representatives from Yucca Valley, one county supervisor, one county-appointed resident of Joshua Tree, and one member-at-large. The MBTA Board sets and adjusts fares, approves the budget, approves service changes, and submits federal and state grant applications. MBTA services were initiated in 1994.

# 2.1.2.2 Services

MBTA utilizes a hub-and-spoke transit model in Twentynine Palms and Yucca Valley, linked together by a linear intercity service. Commuter service is also provided to Palm Springs. ADA compliance is met by deviating neighborhood routes as far as 3/4 mile, creating "neighborhood deviated" fixed-route service, which offers greater operational efficiencies than implementing fully complementary ADA service. Supplementary demand response ("Ready Ride" service) also is provided (SANBAG, 2014a).

# Routes

MBTA routes are grouped as follows, based on service type.

- "Intercity Highway" fixed-route service is provided on two routes (Yucca Valley to/from Twentynine Palms): Route 1A and Route 1B. Service hours are Monday to Friday (6:00 a.m. to 10:00 p.m.), Saturday (7:15 a.m. to 8:35 p.m.), and Sunday (9:00 a.m. to 3:10 p.m.).
- "Neighborhood Deviated" fixed-route service is provided on five routes: Route 3A (MCAGCC to/from Twentynine Palms), Route 3B (Twentynine Palms), Route 7A (North Yucca Valley), Route 7B (South Yucca Valley), and Route 21 (Landers to/from Yucca Valley). Service hours are Monday to Friday (7:00 a.m. to 6:00 p.m.).
- "Commuter" service to Palm Springs is provided on two routes: Route 12 (Palm Springs to/from Yucca Valley) and Route 15 (Palm Springs to/from MCAGCC). Service hours are Monday to Friday (7:00 a.m. to 6:45 p.m., with extended service on Friday to 8:30 p.m.), and Saturday and Sunday (10:00 a.m. to 7:35 p.m.).
- "Ready Ride" provides origin to destination service to seniors and persons with disabilities, as well as the general public on five routes (Routes 30, 31, 34, 36, and 50). Ready Ride service is available in Yucca Valley, Twentynine Palms, and rural areas. Service hours are Monday to Friday (7:00 a.m. to 5:00 p.m.).

MBTA includes a deviation policy, whereby neighborhood routes are deviated for those, including the general public, unable to get to the fixed route bus stops. Route 21 has a deviation as far as 1.5 miles off route. Deviations are made with advance reservations and are subject to approval due to distance and road conditions.

While most MBTA routes allow passenger boarding and alighting at designated bus stops only, in certain areas where there are no bus stops, flag stops are permitted. Flag stops allow passengers to wave down bus drivers, prompting the driver to stop, if safe.

#### Annual System Ridership

In 2013, MBTA served a total of 345,600 fixed route trips, 11,900 commuter trips, and 23,300 demand response trips (SANBAG, 2014a).

#### Fares

The MBTA fare structure is shown in Table 2-5. Generally, fares are dependent upon the service type, with reduced fares offered to seniors (60 years and over) and persons with disabilities (MBTA I.D. cards are required for persons with disabilities). Reduced fares also are offered to students on "Neighborhood Deviated" services. Additionally, children 5 years and under are free (i.e., up to three children per paying adult). Cash for the exact fare, or a pass, is required for the selected service.

"Ready Ride" service is provided to seniors and persons with disabilities at a discounted fare and to the general public at a higher fare.

Additionally, MBTA has an agreement with Copper Mountain College, providing students with a subsidized fare of \$0.50 per ride (with a college I.D. card), throughout the Morongo Basin.

#### **Contact Information**

Riders can contact MBTA via online forms (for questions, comments, complaints, or suggestions), by telephone (760-366-2395), by mail, or in person.

#### **Office/Mailing Address**

62405 Verbena Road Joshua Tree, CA 92252

Telephone operators are available Monday to Friday from 5:30 a.m. to 10:30 p.m. and Saturday 6:30 a.m. to 10:30 p.m.

Service Type	Rider Type	Fare Type	One-way Price	Roundtrip Price		
Intercity Highway	Full Fare/Students	Cash Fare	\$2.50			
(Route 1A and 1B)	Senior/Disabled	Cash Fare	\$1.25			
Neighborhood		Cash Fare	\$1.25			
Deviated (Routes 3A, 3B,	Full Fare	1-Day Pass	\$3.75			
7A, 7B, and 21)		31-Day Pass	\$40.00			
		Cash Fare				
	Students	1-Day Pass \$3.00				
		31-Day Pass	\$25.00			
		Cash Fare \$1.00				
	Senior/Disabled	1-Day Pass	\$3.00			
		31-Day Pass	\$25.00			
Commuter	Full Fare/Students	Cash Fare	\$5.00	\$9.00		
(Routes 12 and 15) <sup>1</sup>	(Morongo Valley to Palm Springs)	7-Day Pass	\$42.00			
	Full Fare/Students	Cash Fare	\$10.00	\$15.00		
	(Twentynine Palms to Palm Springs)	7-Day Pass	\$42.00			
	Full Fare/Students	Cash Fare	\$7.00	\$11.00		
	(Joshua Tree/Yucca Valley to Palm Springs)	7-Day Pass	\$42.00			
	Seniors/Disability	Cash Fare	\$4.50	\$9.00		
	(All Locations to Palm Springs)	7-Day Pass	\$42.00			
Ready Ride	Full Fare/Students	Cash Fare	\$5.00			
		Cash Fare	\$2.00			
	Senior/Disabled	10-Punch Pass	\$15.00			
		20-Punch Pass	\$25.00			
Copper Mountain College	Students	Cash Fare	\$0.50			

Table 2-5. MBTA Fares

Source: MBTA, 2014

Notes: <sup>1</sup> "Commuter" fares are for Route 12. For Route 15, add \$10.00 to Route 12 fares.

#### 2.1.2.3 Management

MBTA staff is divided into three functional areas: administrative, maintenance, and operations. As shown in Table 2-6, MBTA has a total of 41 employees. The entire management and administrative functions are covered by 11 employees. The coach operator and maintenance forces (30 employees) are non-unionized.

Function	Staff	# of Positions
Management	General Manager	1
	Office Manager	1
	Administrative Clerk	2
	Subtotal	4
Administrative	Operations Manager	1
(Operations)	Operations Supervisor	1
	Dispatchers (Dispatch and Call Taking)	4
	Subtotal	6
Administrative	Maintenance Manager	1
(Maintenance)	Subtotal	1
	Management and Administrative Subtotal	11
Operations	Drivers (Full-time)	25
	Drivers (Part-time)	3
	Subtotal	28
Maintenance	"A" Technician	1
	Utility Service Worker	1
	Subtotal	2
	Operations and Maintenance Subtotal	30
	TOTAL	41

Table 2-6. MBTA Staffing

Source: SANBAG, 2014a

# 2.1.2.4 Assets

# MIS/Info Technology

Morongo Basin Transit Authority (MBTA) does not currently have an Information Systems Master Plan or documented decision making process for IT systems. Its vehicles are not equipped with AVL systems, but GPS fleet management software is being used by dispatchers in a similar manner. MBTA does not coordinate data or information exchange with other agencies or transportation providers, except for their entry of operational data into TransTrack for access by SANBAG staff. MBTA's computers are not networked. The agency does not employ its own IT staff. IT support is provided by a local contractor.

Like all agencies in this study, MBTA uses TransTrack for tracking and reporting performance data. In addition, a module of TransTrack has been adapted for MBTA's dial-a-ride services. Dispatch uses this module to provide rider manifests and a customer database. This could be an application that the other smaller agencies, who are not using Trapeze for paratransit scheduling, could benefit from.

MBTA maintenance and inventory is recorded and tracked using Fleet Controller. IT support is provided by local contract and has costs of approximately \$500 per year.

Fleet

The MBTA revenue fleet totals 24 CNG vehicles, consisting of four 35' El Dorado transit buses and 20 cutaways ranging in length from 21-28'. Please see Figure 2-3 for a typical vehicle. MBTA has four non-revenue vehicles, of which two are CNG and two are gasoline/hybrid. These vehicles are shown in Table 2-7 and Table 2-8.

		Vehicle	Vehicle	Fuel	Vehicle	Peak Pull- out
Quantity	Manufacturer	Year	Length	Туре	Function	Requirement
4	Eldorado XHF/TRANSMARK	2007	35'	CNG	HWY/Intercity	2
1	ARBOC	2011	22'	CNG	D/R	1
3	GLAVAL	2009	28'	CNG	DFR HWY/Intercity Backup Commuter	2
1	GLAVAL	2008	21'	CNG	DR	1
4	GLAVAL	2008	24'	CNG	DR and DFR	2
5	GOSHEN	2011	28'	CNG	DFR HWY/Intercity Backup	2
6	STARCRAFT	2007	22'	CNG	DR	
Total						
24						

Table 2-7. MBTA Fleet: Revenue Vehicles

Source: SANBAG, 2014a

Notes: DFR=Deviated Fixed Route; DR=Demand Response; CNG = compressed natural gas; Commuter=Services to Coachella Valley; HWY/Intercity=Connector between 29 Palms and Yucca Valley

Table 2-8.	MBTA Fleet:	Non-revenue	Vehicles
------------	-------------	-------------	----------

Quantity	Manufacturer	Vehicle Year	Fuel Type	Vehicle Function
1	Ford F-250	2012	CNG	Shop
1	Ford CMAX	2013	Hybrid Gas	Relief/Staff
1	Ford T-Connect	2013	CNG	Utility (stop and shelter cleaning)
1	Honda Civic	2004	Hybrid Gas	Relief
Total				
4				

Source: SANBAG, 2014a

Notes: CNG = compressed natural gas



Figure 2-3. MBTA Revenue Vehicle

# Fuel

The MBTA has CNG on-site (Figure 2-4). SoCal Gas provides natural gas via pipeline to both the Joshua Tree and Twentynine Palms locations at PUC price, which is compressed by MBTA's on-site compressor stations. Clean Energy is contracted to perform preventive and repair maintenance on both compressor stations.



Figure 2-4. MBTA CNG Facilities

CNG compressor station

CNG fuel dispenser

# Facilities

MBTA operates from a single facility comprised of a single hard construction building containing two maintenance bays. Portable floor lifts are used and the ceiling has sufficient height to fully raise the vehicles. A covered, and partially walled, vehicle wash bay is located across the parking lot from the maintenance building. A CNG vehicle refueling station and compressor is located on the perimeter between the maintenance and wash bay. The parking area has additional space to expand the size of the fleet,

and bays can accommodate vehicles up to 40'. However, several turn-around locations are too restricted to allow operation of buses longer than present lengths.

MBTA operates from, and maintains a small satellite area on municipal property in Twentynine Palms. Twentynine Palms has a CNG fueling station maintained by MBTA and CNG is available in Yucca Valley at a city owned location. MBTA operates from two transit centers located in Yucca Valley and Twentynine Palms.

Repair of lighting and replacement of light bulbs is contracted locally.

The facility encompasses 11 acres.



Figure 2-5. MBTA Facility



MBTA facility

Vehicle wash station

Other Assets

MBTA has invested in a significant number of passenger waiting shelters on the main highway route (Route 1).

2.1.2.5 Maintenance

In addition to the Maintenance Manager, MBTA has one "A" technician and one utility service worker. The utility service worker is responsible for facility and yard cleaning and vehicle wash and other duties.

Training is limited to Original Equipment Manufacturer (OEM) and vendor training.

Facilities

Minor preventive and repair maintenance is performed in-house. More serious and major repairs are contracted locally. Landscaping and hazardous waste disposal are also contracted.

#### Vehicles

MBTA performs preventive and repair maintenance. Warranty and major engine and transmission repair and replacement are performed by Cummins and Allison in San Bernardino, and by local Ford and Chevrolet dealers. MBTA purchases parts from local dealers, Creative Bus Sales, and from Car Quest.

The utility service worker performs vehicle exchanges and responds to road calls. Vehicle towing, as required, is provided through local resources.

MBTA inventory value averages approximately \$150,000.

Practices and procedures are documented and are in accordance with OEM, and statutory requirements.

#### Bus Stop Signs and Shelters

The utility service worker is responsible for the cleanliness and maintenance of approximately 76 bus shelters and the two transit centers. Bus shelters use solar panels to provide lighting.

# 2.1.3 Mountain Area Regional Transit Authority

MARTA (also referred to as Mountain Transit or "MT" in this study) serves southwest San Bernardino County within the Mountains Subarea (Figure 1-1). MARTA provides service to the City of Big Bear Lake and nearby areas of San Bernardino County (e.g., Big Bear City, Blue Jay, Crestline, Fawnskin, Lake Arrowhead, Rimforest, Running Springs, Skyforest, Sugarloaf, and Twin Peaks). In 2010, Big Bear Lake, Big Bear City, Crestline, and Lake Arrowhead had a combined population of 40,500 people and a combined area of 70 square miles (U.S. Census, 2014).

# 2.1.3.1 Agency

MARTA is a JPA governed by a five-member board consisting of two council representatives from Big Bear Lake, two county supervisors or their appointees (2nd and 3rd Districts), and one member-at-large. The MARTA Board sets and adjusts fares, approves the budget, approves service changes, and approves applications for federal funding for both operation and capital improvements. MARTA services were initiated in 1993.

# 2.1.3.2 Services

MARTA utilizes a time-transfer system with multiple transfer points. Demand response service (i.e., DAR and ADA paratransit) also is provided (SANBAG, 2014a).

# Routes

MARTA routes are grouped as follows, based on service type and area. Generally, service is provided in two areas: the Big Bear area (Big Bear Lake and Big Bear City) and the Rim area (Lake Arrowhead, Crestline/Lake Gregory, Sky Forest, and Running Springs).

Fixed route service is provided on two routes in the Big Bear area (Routes 1 and 1A) and two routes in the Rim area (Routes 2 and 4). Big Bear Fixed Route service hours are Monday to Saturday (5:30 a.m. to 7:30 p.m.) and Sunday (6:30 a.m. to 6:30 p.m.). Rim Fixed Route service hours are Monday to Friday (6:15 a.m. to 7:10 p.m.). No weekend service is provided.

DAR service is provided to seniors and persons with disabilities, as well as the general public living more than 0.25 mile beyond existing fixed routes. Big Bear DAR service hours are Monday to Saturday (6:00 a.m. to 7:00 p.m.) and Sunday (6:00 a.m. to 6:30 p.m.). Rim DAR service hours are Monday to Friday (7:00 a.m. to 6:00 p.m.) and Saturday (9:00 a.m. to 5:00 p.m.).

Off-the-Mountain (commuter) service is provided to the City of San Bernardino (e.g., Metrolink, Omnitrans, and Greyhound stations). Big Bear Off-the-Mountain service provides three trips per day Monday to Friday (6:30 a.m., 11:00 a.m., and 3:30 p.m.) and two trips per day Saturday and Sunday (6:30 a.m. and 3:30 p.m.). Rim Off-the-Mountain service provides four trips per day Monday to Friday (5:30 a.m., 8:45 a.m., 2:45 p.m., and 5:45 p.m.) and two trips per day Saturday (5:30 a.m. and 5:45 p.m.).

Seasonal weekend Trolley service (rubber-tired vehicles) is provided Saturday and Sunday in the Big Bear area during the summer. Service hours are Saturday (7:30 a.m. to 8:00 p.m.) and Sunday (7:30 a.m. to 3:30 p.m.). Holidays falling on a Monday have the same hours as Sunday.

#### Annual System Ridership

In 2013, MARTA served 111,200 fixed route trips, 26,600 commuter trips, and 15,600 demand response trips (SANBAG, 2014a).

#### Fares

The MARTA fare structure is shown in Table 2-9. Generally, fares are dependent upon the service type, with reduced fares offered to seniors (60 years and over) and persons with disabilities (note: MARTA I.D. cards are required for persons with disabilities and California I.D. cards from the Department of Motor Vehicles are required for seniors). Additionally, children 5 years of age and under are free (i.e., up to three children per paying adult). Cash for the exact price (for each individual trip), or a pass, is required for the selected service.

In the Rim area, services are dispersed across a large area. As such, Rim Fixed Route, Rim DAR, and Rim Off-the-Mountain service fares are dependent upon travel between designated zones. Likewise, Big Bear Off-the-Mountain service fares vary based on location (travel by zone).

Weekend Trolley service is provided in Big Bear Lake for a flat fare and is good all weekend.

Additionally, MARTA works with Omnitrans and Metrolink, honoring \$1.00 off the cash fare for transfers to MARTA's "Off-the-Mountain" service.

#### **Contact Information**

Riders can contact MARTA by email (bmerrill@marta.cc), telephone (909-878-5200), mail, or in person. All passes and tickets can be purchased in person at the transit authority office, and 31-day passes can be purchased at five other locations.

#### Office Address

MARTA 41939 Fox Farm Road Big Bear Lake, CA 92315

#### **Mailing Address**

MARTA P.O. Box 1501 Big Bear Lake, CA 92315

Telephone operators are available Monday to Sunday from 5:30 a.m. to 7:00 p.m.

Service Type	Rider Type	Fare Type	Price
		Cash Fare	\$1.50
	Full Fare	Fare TypeCash Fare10-Ride PassDay PassWeekly PassCash Fare10-Ride PassDay PassWeekly PassCash Fare10-Zone PassDay PassWeekly PassCash Fare10-Zone PassDay PassWeekly PassCash Fare10-Zone PassDay PassWeekly PassCash Fare10-Zone PassDay PassVeekly PassCash Fare10-Ride PassCash Fare10-Ride PassCash Fare10-Ride PassCash Fare10-Zone PassCash Fare10-Zone PassCash Fare10-Zone PassCash Fare10-Zone PassCash Fare10-Zone PassCash Fare24-Zone PassCash Fare24-Zone Pass	\$13.50
	Student		\$4.00
Fixed Route		Weekly Pass	\$20.00
(Big Bear)		Cash Fare	\$0.75
	Seniero/Dischility	10-Ride Pass	\$6.75
	Seniors/Disability	Day Pass	\$2.00
		Weekly Pass	\$10.00
		Cash Fare	\$1.00/zone
	Full Fare	10-Zone Pass	\$9.00
	Student	Day Pass	\$5.00
Fixed Route		Weekly Pass	\$20.00
(Rim) <sup>1</sup>		Cash Fare	\$0.50/zone
		10-Zone Pass	\$4.5 0
	Seniors/Disability	Day Pass	\$2.50
		Weekly Pass	\$10.00
	Full Fare	Cash Fare	\$5.00
DAR	Student	10-Ride Pass	\$45.00
(Big Bear)	Seniero/Dischility	Cash Fare	\$2.50
	Seniors/Disability	10-Ride Pass	\$22.50
	Full Fare Student	Cash Fare	\$4.00 first zone, then \$2.00/Zone
DAR		10-Zone Pass	\$36.00
(Rim) <sup>1, 2</sup>	Seniors/Disability	Cash Fare	\$2.00 first zone, then \$1.00/Zone
		10-Zone Pass	\$18.00
	Full Fare	Cash Fare	\$2.50/Zone
Off-the-Mountain	Student	24-Zone Pass	\$54.00
(Big Bear) <sup>3</sup>	Senioro/Dischility	Cash Fare	\$1.25/Zone
		24-Zone Pass	\$27.00

# Table 2-9. MARTA Fares

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

	Full Fare/Student	II Fare/Student Cash Fare 30-Zone Pass (2 punches for San Bernardino Zone) Cash Fare eniors/Disability	\$1.50 per zone (Rim Zones 1-3) \$3.00 San Bernardino Zone
Off-the-Mountain			\$40.50
(RIM)⁴	Seniors/Disability		\$0.75 per zone (Rim Zones 1-3) \$1.50 San Bernardino Zone
		30-Zone Pass (2 punches for San Bernardino Zone)	\$20.25
	Full Fare	Cash Fare	\$5.00
weekenu rolley	Seniors/Disability	Cash Fare	\$2.50

Table 2-9. MARTA Fares (Continued)

Source: MARTA, 2014

Notes: <sup>1</sup> Fares based on zones: 1 = Cedar Pines—Lake Gregory; 2 = Lake Gregory—5 Points; 3 = 5 Points—Sky Forest/Kuffle Canyon; 4 = Sky Forest/Kuffle Canyon—Running Springs

 $^{2}$  For 10-Zone Pass, first zone = 2 punches

<sup>3</sup> Big Bear Zones: 1 = Big Bear—Fawnskin; 2 = Fawnskin—Snow Valley; 3 = Snow Valley— Running Springs; 4 = Running Springs—San Bernardino

<sup>4</sup> Rim Zones: 1 = Top Town/Crestline Zone; 2 = Twin Peaks/Rim Forest Zone; 3 = Lake Arrowhead Zone; San Bernardino Zone

# 2.1.3.3 Management

Operations, facility and maintenance activities are directly performed by MARTA employees. As shown in Table 2-10, MARTA has a total of 36.5 employees. The entire management and administrative functions are covered by 11.5 employees, including one contracted employee (Mobility Manager). The coach operators (22 employees) are members of the Teamsters Union Local 572.

# 2.1.3.1 Assets

# MIS/Info Technology

MARTA does not currently have an Information Systems Master Plan or documented decision making process for IT systems. Its buses are equipped with GPS technology for fleet tracking through AVL, which allows integration with Google Transit to provide real time vehicle location information to the public. MARTA will soon be launching a new website where customers will be able to plan their trips on-line.

Although buses are tracked via an AVL system, the agency does not use scheduling software, so on-time performance is obtained by dispatchers as drivers call in via radio and report bus stop arrival/departure for key time points. Data is entered into spreadsheets for later analysis. Buses are not equipped with automatic passenger counters (APCs). Ridership data is reported by drivers daily and entered into TransTrack.

Function	Staff	# of Positions
Management	General Manager/CEO	1
	Assistant General Manager	1
	Administrative Assistant	1
	Subtotal	3
Administrative	Accounting Clerk	1
(Other)	Administrative Clerk	1
	Subtotal	2
Administrative	Operations Supervisor	2
(Operations)	Dispatchers	2.5
	Mobility Manager (Contractor)	1
	Subtotal	5.5
Administrative	Maintenance Manager	1
(Maintenance)	Subtotal	1
	Management and Administrative Subtotal	11.5
Operations	Drivers (Full-time)	18
	Drivers (Part-time)	4
	Subtotal	22
Maintenance	Mechanic	2
	Mechanic Helper	1
	Subtotal	3
	Operations and Maintenance Subtotal	25
	TOTAL	36.5

# Table 2-10. MARTA Staffing

Source: SANBAG, 2014a

MARTA's 11 PC's are networked with two servers. In addition, they use three laptops, two of which are dedicated to vehicle diagnostics. MARTA does not have its own IT staff. Instead it utilizes an outside IT technical consultant for maintaining computer equipment and systems.

MARTA uses Fleet Management to record and track maintenance activities and inventory. IT support is provided by a retainer contract.

Fare collection activities are performed by a part-time employee at Big Bear and by the dispatcher at Crestline.

Fleet

The revenue fleet is comprised of 10 cut-a-way vehicles and 1 trolley at Big Bear and 10 cut-a-way vehicles at Crestline. A typical vehicle is depicted in Figure 2-6. Eleven vehicles use gasoline and 9 vehicles use diesel fuel. These vehicles are shown in Table 2-11 and Table 2-12. Revenue vehicles are purchased through CalACT and non-revenue vehicles are purchased through a state contract.

		Vehicle	Vehicle	Fuel	Vehicle	Peak Pull- out
Quantity	Manufacturer	Year	Length	Туре	Function	Requirement
3	Ford Aeroelite El Dorado E350	2012	22	Gas		
1	Ford Aeroelite El Dorado E450	2012	22	Gas		
2	Ford El Dorado AeroElite E350	2014	23	Gas		
1	Ford El Dorado AeroElite E450	2014	25	Gas		
1	Ford Starcraft Type II E450	2008	23	Gas		
3	Ford Starcraft Type III	2009	25	Gas		
2	Chevrolet Aeroelite Type VII	2008	29	Diesel		
4	Chevrolet Glaval Type VII 5500	2009	29	Diesel		
2	Chevrolet Glaval Titan	2009	29	Diesel		
1	Trolley Enterprises Freightliner	2004	31	Diesel		
Total						
20						

Table 2-11.	MARTA Fleet:	Revenue	Vehicles
-------------	--------------	---------	----------

Source: SANBAG, 2014a

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY
Quantity	Manufacturer	Vehicle Year	Fuel Type	Vehicle Function
1	Dodge Durango 4x4	2008	Gas	Field Vehicle
1	Ford 4x4	2002	Gas	Shop Truck
1	Ford 4x4	2001	Gas	Shop Truck
2	Chevrolet 4x4	2009	Gas	Shop Truck
Total				
5				



Figure 2-6.	MARTA Revenue	Vehicle
-------------	---------------	---------

#### Fuel

MARTA has an exception from the state to operate their vehicles on diesel and gasoline because accessible natural gas facilities are not available and the high altitude of the MARTA service area impairs CNG performance. There are no fueling capabilities at the facility. Diesel and gasoline are obtained at the sheriff facility through a contract with the County. Moonridge Fuel is a back-up supplier for Big Bear. Crestline has no back-up fuel supply.

### Facilities

MARTA is comprised of two facilities with the one located at Big Bear and the other at Crestline.

### Big Bear Facility:

Big Bear's Maintenance facility is a steel-on-frame building and has two bays capable of servicing up to a 35' vehicle (Figure 2-7). It is co-located with the agency's administrative headquarters. Portable floor lifts are used and will accommodate all two-axle vehicles. There is no on-site fueling or drive through bus wash. There is insufficient capacity to perform additional maintenance. Tires are stored in a shipping container to increase space inside the maintenance area.

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY



Figure 2-7. MARTA Big Bear Facility

**Big Bear Facility** 

Trolley.



Tire storage container

# Crestline Facility:

Crestline is a 35' X 50' wood-frame building with a single bay that can contain up to a 27' vehicle. There is no vehicle lifting capability. There is no on-site fueling or drive through bus wash. There is insufficient capacity to perform additional maintenance. This facility was not designed as a transit yard and is not sufficient to accommodate the 29-foot Glaval Titans used for Off-the-Mountain service. In addition, the bus yard is very small and it is very difficult to maneuver buses within it. The Crestline Facility has experienced flooding during heavy precipitation.

# Other Assets

### 2.1.3.2 Maintenance

There is one mechanic at each facility to perform vehicle maintenance and one mechanic helper at Big Bear to perform vehicle cleaning and some vehicle maintenance for both facilities. The Maintenance Manager is a working mechanic, as necessary, and manages the inventory.

Training is limited to OEM and product vendor training.

#### Facilities

MARTA performs preventative and repair maintenance and uses local contractors as necessary for major or complex repairs to include electrical and plumbing. Landscaping is performed in-house by the mechanic helper. Janitorial services, snow removal and hazardous waste disposal are contracted.

#### Vehicles

MARTA performs preventive and repair maintenance. Engines and transmissions are purchased from the OEM and Trans Star respectively and replaced in-house. Body repair and painting is contracted to A-Z Bus Sales. Batteries are provided through a contract with Centennial. Tires are leased through a contract with Goodyear. Most parts are sourced from local Ford and GM dealerships. Inventory is limited to mostly consumables and the combined inventory value for both facilities averages approximately \$7,500.

Support for retrieval and towing of vehicles is contracted. Road calls and vehicle replacement response for off-the-mountain incidents are time consuming. MARTA would like to pursue an agreement for road call and passenger assistance with Omnitrans when the MARTA vehicles are in the San Bernardino valley.

Practices and procedures are documented and are in accordance with OEM, and statutory requirements.

#### Bus Stop Signs and Shelters

MARTA owns and maintains a single shelter. The remaining 20 are contracted to an entity that buys, installs and maintains them. Shelters feature advertising from which MARTA derives income.

### 2.1.4 City of Needles

The City of Needles serves east San Bernardino County, within the Colorado River Subarea (Figure 1-1). The City of Needles provides Needles Transit Services (NTS) to city residents. In 2010, the City of Needles had a population of 4,800 people and covered 31.28 square miles (U.S. Census, 2014).

### 2.1.4.1 Agency

NTS is administered by the City of Needles, which has a council-manager form of government consisting of seven city council representatives, including the mayor. The Needles City Council approves budgets, fare adjustments, service changes, and federal and state grant applications. NTS were initiated in 1995.

### 2.1.4.2 Services

NTS include both Needles Area Transit (NAT) and demand response services. The NAT service provides community circulator service. Demand response (DAR and ADA paratransit) services are met by deviating the single fixed route (City of Needles, 2014a). Services are operated by McDonald Transit Associates under contract.

In addition to NTS, the City of Needles contracts with the Needles Senior Citizens Club to provide local DAR service to seniors and persons with disabilities within the City of Needles, and Medical Transport (non-emergency) to provide medical transport DAR service into Arizona for the general public (SANBAG, 2014a).

#### Routes

Deviated fixed route service is provided on one route, comprised of two loops, with the bus arriving at the downtown bus stop approximately every 30 minutes. On this route, vehicles can deviate off route, with prior reservations, thus providing DAR and ADA paratransit services. Each bus stop is serviced every 60 minutes, although vehicles may run late due to deviation service requests. Service hours are Monday to Friday (7:00 a.m. to 7:00 p.m.) and Saturday (10:00 a.m. to 2:00 p.m.). One bus is used to provide the daily service schedule, with one additional bus available as backup.

The separate DAR service for seniors and persons with disabilities contracted with the Needles Senior Citizens Club operates weekdays, 9:00 a.m. to 1:30 p.m. The Medical Transport DAR operates on Tuesdays and Thursdays, as needed and scheduled (SANBAG, 2014a). Drivers for both services are part-time city employees.

#### Annual System Ridership

In FY2013, NTS served 34,153 trips on the deviated fixed route. In addition, the Needles Senior Citizen Club DAR transported 4,353 passengers and the Medical Transport DAR carried 199 passengers (SANBAG, 2014a).

#### Fares

The NTS fare structure is shown in Table 2-13. The adult fare is \$1.10, with a discount offered to seniors (60 years and over) and persons with disabilities. Deviation (i.e., DAR

and ADA paratransit) service costs an extra \$0.50. Cash for the exact fare (for each individual trip) is required.

Service Type	Rider Type	Fare Type	Price		
	Full Fare	Cash Fare \$1.10			
	Seniors/Disability	Cash Fare \$1.00			
Deviated Fixed Route	Full Fare	30 Punch-Card Pass	\$31.50		
	Full Fare	Route Deviation Service	\$1.60		
	Seniors/Disability	Route Deviation Service	\$1.50		
DAR	Seniors/Disability	Cash Fare	\$1.00		
Medical Transport DAR All Riders – to Valley View Medical Center		Cash	\$5.00 Round Trip		
Medical Transport DAR	All Riders – Beyond Valley View Medical Center	Cash	\$10.00 Round Trip		

Table 2-13.NTS Fares

Source: SANBAG, 2014a

Notes: Deviated fixed route service costs an extra \$0.50.

#### Contact Information

Questions, comments, and complaints regarding NTS can be directed to McDonald Transit Associates by telephone (866-669-6309) or online forms (LINK). Other questions, comments, and complaints can be directed to City of Needles staff by telephone (760-326-2113) or in person at Needles City Hall.

#### **Office Address**

Needles City Hall 817 Third Street Needles, CA 92363

City of Needles operating hours are Monday to Friday from 8:30 a.m. to 4:30 p.m.

2.1.4.3 Management

The City of Needles has one City Administrator serving in a part-time capacity as Transit Services Manager who oversees the day-to-day management of NTS, including the operations and management contract. The Transit Services Manager estimates that she spends one-tenth of a full-time-equivalent (FTE) on transit-related work. The Transit Services Manager also is responsible for planning, with administration support provided by other city departments, such as the finance department. All other staffing is provided by the contractor. (Note: the City of Needles awarded a new 3-year contract to McDonald Transit Associates on June 24, 2014.)

Staffing for the system is shown in Table 2-14.

Function	Staff	# of Positions
Management	Transit Services Manager (part-time)	1
(City)	Subtotal	1
Management (Contractor)	NTS Manager (local)	1
	NTS Driver/Dispatcher	1
	Subtotal	2
Operations	Drivers (Full-time)	2
(Contractor and City)	DAR/DAR Medical – driver (Part-Time City Employees)	2
	Subtotal	4
City/Contractor Operations Su	ubtotal	6
	GRAND TOTAL	7

Table 2-14. NTS Staffing

#### 2.1.4.4 Assets

MIS/Info Technology

The only transit-specific MIS system utilized by NTS is the TransTrack web-based performance reporting system, used to enter operational, ridership, and financial data.

Fleet

The deviated fixed route service fleet consists of two city-owned 2012 Elkhart 18-passenger cutaway buses with gasoline engines, and one city-owned 2007 Starcraft 18-passenger cutaway bus used as a backup unit. The DAR fleet consists of one 2008 El Dorado and one 2009 Starcraft cutaway, with a 2002 Ford used as backup. All DAR vehicles are 9-passenger vehicles.

The service fleet vehicles are shown in Table 2-15. There are no identified non-revenue fleet vehicles.

Quantity	Manufacturer	Vehicle Year	Vehicle Length	Fuel Type	Vehicle Function	Peak Pull- out Requirement
2	Elkhart 18 passenger	2012		Gas	Deviated Fixed- Route	1
1	Starcraft 18 passenger	2007		Gas	Deviated Fixed Route – Backup	0
1	El Dorado	2008		Gas	DAR/DAR Medical	1
1	Starcraft	2009		Gas	DAR/DAR Medical	1
1	Ford (back-up unit)	2002		Gas	DAR/DAR Medical	0
Total						
6						3

Table 2-15. NTS Revenue Fleet Vehicles

Fuel

All revenue vehicles are powered by gasoline.

#### Facilities

The NTS deviated fixed route fleet is currently stored at the contractor's facility at 1714 W. Broadway, Needles, California, and is taken to a local vendor for routine service. For major work, vehicles are taken to Bullhead City, Arizona to a larger shop or dealership. McDonald Transit Associates does not have any maintenance staff, but operations staff will soon be moving into the Intermodal Transit Center being redeveloped at the El Garces Depot, the historic 1908 train station/hotel in Needles, located at 950 Front Street. They will have a NTS operation center and transit yard for storage of the buses. McDonald Transit Associates will lease the facility from the city.

The DAR fleet is maintained by a city-employed mechanic at the city public works yard, located at 112 Robuffa, Needles, California.

#### Other Assets

#### 2.1.4.5 Maintenance

The McDonald Transit Associates Transit Manager manually tracks vehicle maintenance records and arranges for services, as indicated by mileage and service intervals. Preventative Maintenance Inspections are entered into TransTrack.

### 2.1.5 Omnitrans

Omnitrans serves southwest San Bernardino County, within the Valley Subarea (Figure 1-1). The Omnitrans service area covers 463 square miles and has a population of 1,470,000 (NTD, 2012). Omnitrans provides service to 15 cities (the Cities of Chino, Chino Hills, Colton, Fontana, Grand Terrace, Highland, Loma Linda, Montclair, Ontario, Rancho Cucamonga, Redlands, Rialto, San Bernardino, Upland, and Yucaipa) and nearby areas of San Bernardino County. Omnitrans also serves Pomona Transit Center in Los Angeles County, as well as Riverside Downtown Terminal in Riverside County. Omnitrans is the largest local transit provider in San Bernardino County.

### 2.1.5.1 Agency

Omnitrans was created by a JPA in 1976. Omnitrans is governed by a 20-member board consisting of all five county supervisors and an elected official from each of the 15-member cities. The Omnitrans Board adopts the budget, establishes policy (fares, marketing, and service changes), adopts rules and regulations, and submits federal and state grant applications.

### 2.1.5.2 Services

Omnitrans primarily operates a hub-and-spoke system with transfers at major transfer centers. Demand response service (i.e., DAR and ADA paratransit) is also provided (SANBAG, 2014a).

### Routes

Omnitrans routes are grouped as follows, based on service type.

"Fixed Route" service is provided on 26 fixed routes (Routes 1-5, 7-8, 10-11, 14-15, 19-20, 22, 29, 61, 63, 65-68, 80-83, and 215). Service hours are Monday to Friday (3:48 a.m. to 11:12 p.m.), Saturday (5:13 a.m. to 10:34 p.m.), and Sunday (5:51 a.m. to 7:49 p.m.).

Additionally, the "sbX Green Line" provides bus rapid transit (BRT) service in San Bernardino and Loma Linda, between Cal State San Bernardino and Loma Linda University Medical Center. This new service was implemented on April 28, 2014, utilizing extensive exclusive bus lanes, dedicated passenger stations constructed for the new line, and new 60-foot articulated low-floor buses (Figure 2-8). Service hours are Monday to Friday (6:00 a.m. to 8:45 p.m.).



Figure 2-8. Omnitrans' New sbX Service

Omnitrans new sbX BRT vehicle



New BRT station on sbX line.

"OmniGo" also provides fixed route service. "OmniGo" service is provided on three fixed routes in Yucaipa (Routes 308, 309, and 310), one fixed route in Grand Terrace (Route 325), and one fixed route in Chino Hills (Route 365). Service hours are as follows:

- Route 308/309/310—Monday to Friday (6:00 a.m. to 9:00 p.m.), Saturday (7:00 a.m. to 8:25 p.m.), and Sunday (7:30 a.m. to 6:40 p.m.)
- Route 365—Monday to Friday (5:00 a.m. to 10:00 p.m.) and Saturday (6:00 a.m. to 6:00 p.m.)
- Route 325—Monday to Friday (5:00 a.m. to 8:30 p.m.), Saturday (7:20 a.m. to 6:15 p.m.), and Sunday (8:30 a.m. to 6:15 p.m.)

*"Access"* provides complementary ADA paratransit service to seniors and persons with disabilities within the ADA service area (i.e., 3/4-mile on either side of an existing fixed route). Service hours are the same as for fixed route services.

#### Annual System Ridership

In 2013, Omnitrans served 15,655,100 fixed route trips, 472,600 ADA demand response trips, and 18,500 DAR demand response trips (SANBAG, 2014a).

#### Fares

The Omnitrans fare structure is shown in Table 2-16. Generally, fares are dependent upon the service type, with reduced fares offered to seniors (62 years and over), persons with disabilities, Medicare recipients, and youth (Omnitrans I.D. cards are required for seniors and persons with disabilities). Additionally, children 46 inches and under are free. Cash or a ticket for the exact fare (for each individual trip), or a pass, is required for the selected service.

*Access* service is restricted to riders and attendants with ADA certification (an Omnitrans I.D. card is required); therefore, fares are dependent upon travel between zones (note:

eligible riders may bring up to one guest; however, both the eligible rider and the guest must pay the fee, while the eligible attendant is free).

Omnitrans offers the GoSmart Student Pass Program, which allows students at participating schools unlimited free rides on all fixed-route services. Additionally, under this program, eligible students with ADA certification receive a 20 percent discount on *Access* service. Schools and/or programs include California State University San Bernardino, Chaffey College, San Bernardino Valley College, Crafton Hills College, Art Institute of California-Inland Empire, Destination Diploma (San Bernardino City Unified School District), ASA<sup>2</sup> Charter School, and Youthbuild.

Omnitrans also works with several other transit agencies to honor each other's fare media (i.e., passes and tickets). Omnitrans accepts all purchased passes from Foothill Transit, Riverside Transit Authority (RTA), MARTA, and Metrolink from points of connection, and from Orange County Transportation Authority (OCTA) from Chino Transit Center. Round-trip Metrolink tickets/passes also are valid on Omnitrans to Metrolink (connecting routes only). Omnitrans 31-, 7-, and 1-day passes are accepted as follows: from points of contact (RTA, VVTA, and MARTA); from Pomona and Montclair Transit Centers (Foothill Transit); and from Chino Transit Center (Foothill Transit and OCTA). Premium services are excluded to/from Omnitrans and RTA, including *Access*, Commuterlink, and Dial-a-Ride.

#### Contact Information

Riders can contact Omnitrans via online forms (for questions, comments, complaints, or suggestions), by telephone, by mail, or in person. An online store (http://store.omnitrans.org/) also is available to purchase passes and tickets.

#### Mailing Address

Omnitrans (East Valley) 1700 W. Fifth Street San Bernardino, CA 92411

Omnitrans (West Valley) 4748 Arrow Highway Montclair, CA 91763

Telephone operators are available Monday to Friday from 7:00 a.m. to 6:00 p.m. and Saturday and Sunday from 8:00 a.m. to 5:00 p.m.

<sup>&</sup>lt;sup>2</sup> "ASA" is the name of the founder's father, not an acronym.

Service Type	Rider Type	Fare Type	Price		
		Cash Fare	\$1.75		
	Eull Fore	1-Day Pass	\$5.00		
	FuilFale	7-Day Pass	\$18.00		
		31-Day Pass	\$55.00		
Fixed Route,		Cash Fare	\$0.75		
OmniGo	Sopiers/Disshility/Madisors	1-Day Pass	\$2.25		
	Seniors/Disability/Medicare	7-Day Pass \$8.			
		31-Day Pass	\$27.50		
	N. I	7-Day Pass	\$14.00		
	Foun	31-Day Pass			
	1 - 3 Zone Trip	Cash Fare or Ticket	\$3.25		
100000 <sup>1</sup>	4 Zone Trip	Cash Fare or Ticket	\$4.25		
ACCESS	5 Zone Trip	Cash Fare or Ticket	\$5.25		
	6 Zone Trip	Cash Fare or Ticket	\$6.25		

 Table 2-16.
 Omnitrans Fares

Source: Omnitrans, 2014a

Notes: <sup>1</sup> Access service beyond the ADA service area but within the city limits of the 15 cities that comprise the Omnitrans service area is available for an additional \$5.00 surcharge.

### 2.1.5.3 Management

Omnitrans staff consists of 634 employees, as shown in Table 2-17. Management and Administrative positions total 156, and there are 396 coach operators and 82 maintenance workers. The coach operators are members of the Amalgamated Transit Union (ATU) and maintenance/administrative staff are members of the Teamsters Union Local No. 166.

Additionally, "*Access*" service and some limited fixed route services are contracted to First Transit, Inc., with 43 management, administrative, and operations staff and 164 drivers and maintenance workers.

Function	Staff	# of Positions
Management	General Manager (GM)/CEO	1
	Assistant to GM/CEO	1
	Administrative Secretary (GM/CEO)	1
	Director of Internal Audit	1
	Quality Assurance Manager	1
	Program Manager	1
	Administrative Secretary (IPMO)	1
	Construction Manager	1
	Subtotal	8
Finance Department	Finance Director	1
	Treasury Manager	1
	Planner II	1
	Accounting Manager	1
	Senior Financial Analyst	2
	Accountant	2
	Payroll Technician	2
	Accounting Clerk	1
	Administrative Clerk	1
	Subtotal	12
Human Resources and Safety & Regulatory	Human Resources, Safety & Regulatory Compliance Director	1
	Human Resources Leave Administrator	1
	Employee Relations Manager	1
	Human Resources Analyst	1
	Human Resources Specialist	1
	Human Resources Assistant	2
	Human Resources Clerk	2
	Safety & Regulatory Compliance Manager	1
	Safety & Regulatory Compliance Specialist	2
Loss Prevention & Security Supervisor Construction Safety Manager		1
		1
	Subtotal	14
IT Department	IT Director	1
	Network Administrator	1

Table 2-17. Omnitrans Staffing

	Web Designer	1
	Systems Coordinator	1
	Systems Engineer	1
	Application Developer	2
	Database Administrator	1
	Subtotal	8
Procurement Department	Procurement Director	1
	Procurement Clerk	1
	Materials Manager	1
	Contracts Manager	1
	Warranty Coordinator	1
	Senior Contract s Administrator	2
	Contract s Administrator	3
	Contracts Review Analyst	1
	Parts Clerk	11
	Subtotal	22
Maintenance Department	Maintenance Director	1
	Facility Manager	1
	Facility Supervisor	1
	Maintenance Manager	2
	Shift Supervisor	10
	Technical Services Manager	1
	Fleet Analyst	2
	Maintenance Clerk	2
	Subtotal	20
Operations Department	Operations Director	1
	Operations Senior Secretary	1
	Administrative Clerk	2
	Clerical Helper	1
	Transportation Manager	2
	Operations Services Supervisor	1
	Paratransit Eligibility Technician	2
	Assistant Transportation Manager	2
	Application Specialist	1
	Dispatch Supervisor	1

# Table 2-17. Omnitrans Staffing (Continued)

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

	Fleet Safety and Training Supervisor	1
	Field Supervisor	15
	Dispatcher	6
	Fleet Safety and Training Instructor	6
	Subtotal	42
Marketing and Planning	Marketing and Planning Director	1
Department	Administrative Secretary	1
	Development Planning Manager	1
	Planning Intern	2
	Customer Service Manager	1
	Info Clerks	6
	Sales Supervisor	1
	Receptionist	2
	Marketing Manager	1
	Marketing Specialist	2
	Service Planning Manager	1
	Planner I	1
	Stop and Stations Supervisor	1
	Maintenance Worker	7
	Schedule Analyst	2
	Subtotal	30
Operations	Drivers	396
	Subtotal	396
Maintenance	Equipment Mechanic	40
	Mechanic Helper	14
	Tire Repair Worker	2
	Utility Service Worker	15
	Body and Paint Worker	2
	Building Maintenance Mechanic	5
	Custodian	4
	Subtotal	82
	Omnitrans Total	634

# Table 2-17. Omnitrans Staffing (Continued)

Operations and	General Manager	1
Maintenance (Contractor)	Operations Managers	2
	Admin Asst's and Clerical	4
	Safety/Training Manager	1
	Maintenance Manager	1
	Asst. Safety/Training Manager	1
	Trainers	4
	Road Supervisors	6
	Dispatchers	11
	Schedulers	3
	Reservationists	9
	Drivers	152
	Lead Technicians	2
	Maintenance Technicians	6
	Utility Workers	4
	Subtotal	207
	Contractor Total	207
Omnitrans and Contractor Total		

Table 2-17. Omnitrans Staffing (Continued)

Notes: Part-time positions counted as 0.5 full time employees

### 2.1.5.4 Assets

#### MIS/Info Technology

Omnitrans has an MIS Master Plan. A Capital Projects Plan for IT Systems improvements is submitted to Finance for budgeting purposes. Priorities are determined by need and budget availability and all projects greater than \$25,000 are submitted to the Board of Directors for approval prior to award. Of its \$26 million capital budget, \$3,385,000 is budgeted for MIS equipment for FY2013/14.

The Information Technology Services (ITS) department is charged with managing all fixed-based technology deployed at Omnitrans. The ITS department supports over 50 applications. For each system, a level of ITS support has been identified by the IT Steering Committee. By policy, ITS aims to replace 25 percent of the personal computers due to maintenance and software problems annually. A computer training facility has been established. The Director of IT chairs the Information Systems Steering Committee which meets monthly. IT Staff consist of the Director of IT, network administrator, and 6 staff members.

Omnitrans locations in San Bernardino, Montclair, Rancho Cucamonga, West 5th Street and the radio tower site are all networked. IT network management is outsourced currently.

Omnitrans uses SAP software as its enterprise management system to control inventory and maintenance activities. The full list of SAP functions can be found in the appendix.

One of the main systems used by Omnitrans is Trapeze. Trapeze supports operations activities (such as real time dispatch, passenger counters, workforce management, bus stop management), fixed route and demand responsive service scheduling, and customer contact reporting. Access is used to track tools and equipment, budgeting data, fleet management data, as well as road call data and reporting.

Omnitrans vehicles are equipped with GPS devices and are tracked by an AVL system. This enables Omnitrans to provide real time bus arrival information to passengers through NexTrip, as well as on-line trip planning. Vehicles are also equipped with Automated Mobile Data Terminals (AMDT), and part of the fleet is equipped with automatic passenger counters (APCs) as well. Preventive maintenance procedures for the vehicles include the radios and AMDT units.

On-board fare collection equipment consists of General Farebox Inc. (GFI) Odyssey fareboxes, the same farebox used by VVTA. Original Equipment Manufacturer (OEM) training is planned for one maintenance technician for operation and maintenance of the General Farebox Inc. equipment.

#### Fleet

The revenue fleet includes 185 CNG-fueled buses, comprised of 10 30-foot buses, 161 40-foot buses, and 14 60-foot articulated BRT buses (see Figure 2-9). Additionally, the revenue fleet includes 131 gas-fueled demand response vehicles. The non-revenue fleet of 73 vehicles is comprised of 1 GMC diesel (used for local parades), 3 GEM electric, and 69 gasoline fueled vehicles. These vehicles are shown in Table 2-18 and Table 2-19.

Fifteen percent of future bus purchases are to be zero emission buses (ZEB).

Quantity	Manufacturer	Vehicle Year	Vehicle Length	Fuel Type	Vehicle Function	Peak Pull- out Requirement
10	Thomas	2003	30'	CNG	Bus (Motorbus)	
11	New Flyer	2000	40'	CNG	Bus (Motorbus)	
3	New Flyer	2000	40'	Hybrid	Bus (Motorbus)	
38	New Flyer	2001	40'	CNG	Bus (Motorbus)	
22	New Flyer	2003	40'	CNG	Bus (Motorbus)	
23	New Flyer	2005	40'	CNG	Bus (Motorbus)	
27	New Flyer	2009	40'	CNG	Bus (Motorbus)	
17	New Flyer	2011	40'	CNG	Bus (Motorbus)	
20	New Flyer	2012	40'	CNG	Bus (Motorbus)	
14	New Flyer	2012	60'	CNG	Bus (Motorbus)	
6	El Dorado	2004	23'	Gas	DR	
49	El Dorado	2006	23'	Gas	DR	
10	Chevrolet	2008	10'	Gas	DR	
31	Starcraft	2008	23'	Gas	DR	
13	Ford	2009	10'	Gas	DR	
6	Starcraft	2010	23'	Gas	DR	
16	Ford	2013	23'	Gas	DR	
Total						
316						136

Table 2-18. Omnitrans Fleet: Revenue Vehicles

Source:

SANBAG, 2014a

Notes:

CNG = compressed natural gas; DR = demand response

Quantity	Manufacturer	Vehicle Year	Fuel Type	Vehicle Function
1	GMC	1958	Diesel	Local Parades
1	Ford	2000	Gas	Support Vehicle
1	Ford	2013	Gas	Support Vehicle
3	GEM	2005 (2), 2009	Electric	Support Vehicle
1	Ford	2004	Gas	Support Vehicle
2	Chevrolet	1999	Gas	Support Vehicle
2	Chevrolet	2002	Gas	Support Vehicle
2	Chevrolet	2008	Gas	Support Vehicle
13	Dodge	2009	Gas	Support Vehicle
2	Ford	1997	Gas	Support Vehicle
2	Ford	2002	Gas	Support Vehicle
1	Ford	2003	Gas	Support Vehicle
1	Ford	2006	Gas	Support Vehicle
4	Ford	2008	Gas	Support Vehicle
5	Ford	2011	Gas	Support Vehicle
32	Ford	2012	Gas	Support Vehicle
Total				
73				

Table 2-19. Omnitrans Fleet: Non-revenue Vehicles

# Figure 2-9. Omnitrans sbX Revenue Vehicle and Fleet in Yard



### Fuel

Omnitrans has gasoline and CNG fuel for vehicle use on site. LNG, which is converted to CNG by a vaporizer system (Figure 2-10), is stored at both the East Valley (30,000 gallon) and West Valley (20,000 gallon) facilities, and is replenished 6 days a week at a daily rate of 11,000 gallons through a contract with Clean Energy.

The I Street facility, managed and operated by First Transit, Inc., has gasoline and diesel fuel for vehicle and back-up generator use, respectively.

LNG contract pricing is fixed and hedged, and diesel and gasoline are long-term fixed contracts with IPC (USA), Inc. (IPC – <u>http://www.usipc.com</u>).



Figure 2-10. Omnitrans CNG Fuel

East Valley LNG Tanks

East Valley Vaporizer

Facilities

The Omnitrans fleet operates from four facilities – East Valley (see Figure 2-11), West Valley, I Street, and Rancho Cucamonga. Omnitrans manages Operations and Maintenance at the East Valley and West Valley facilities only, while First Transit, Inc. manages operations and maintenance at the I Street and Rancho Cucamonga facilities. The East Valley facility is undergoing upgrades to support the recently acquired 60-foot BRT buses. Omnitrans also utilizes ten Transit Centers/Transfer Stations, which are maintained by the cities in which they reside.



Figure 2-11. Omnitrans East Valley Facility

East Valley facility





East Valley VMF Project—to be completed 2015

### 2.1.5.5 Maintenance

The Omnitrans Maintenance Director has established four direct report managers consisting of two Maintenance Managers, one Facility Manager, and one Technical Service Manager. There are 10 shift supervisors, 40 equipment mechanics, 14 mechanic helpers, 2 body and paint workers, 2 tire repair workers, and 15 utility service workers. There is one facility supervisor, 5 building maintenance mechanics, and 4 custodians. Two fleet analysts and two maintenance clerks support Maintenance.

Omnitrans maintains an extensive list of contracts for parts, materials, and services. Omnitrans Contracts and Purchasing utilizes an on-line bidding system that speeds response time from bidders and adds efficiency to the process.

#### Facilities

Facility Maintenance staff performs all preventative and repair maintenance at the I-Street facility, with custodial duties addressed by the O&M contractor, First Transit, Inc. The Rancho Cucamonga Operations facility is operated and maintained by First Transit, Inc. The West and East Valley facilities along with all transfer stations are maintained and cleaned in-house with support through contractors as necessary. Bus stop maintenance is managed by the Marketing Department and performed by Marketing Maintenance Workers.

#### Vehicles

Vehicles owned and operated by Omnitrans have all preventive, minor and major repairs performed in-house. The East Valley facility performs non-revenue vehicle preventive and repair maintenance, rebuilds the major components in its overhaul shop and performs the majority of its paint and body activities in its body shop. East Valley supports West Valley as needed for major repairs.

The West Valley facility performs preventive and repair maintenance.

Warranty and major engine, transmission, HVAC and body repairs may be contracted to several entities.

I Street and Rancho Cucamonga, operated by First Transit, Inc., perform all maintenance as stated in their contracts with Omnitrans.

Practices and procedures are documented and are in accordance with OEM, and statutory requirements.

Omnitrans conducts extensive training of vehicle maintenance personnel through the use of OEM resources, and both vehicle and facility maintenance through the Southern California Regional Transit Training Consortium (SCRTTC) and other vendors.

#### Bus Stop Signs and Shelters

Omnitrans maintains 2,500 bus stops, 350 bus shelters, and 275 benches. Both the stops and shelters, as necessary, are purchased, installed and maintained directly by Marketing Maintenance personnel. Contractor services are used as needed.

### 2.1.6 Victor Valley Transit Authority

VVTA serves west San Bernardino County, within the Victor Valley Subarea (Figure 1-1). The VVTA service area covers 424 square miles and includes a population of 335,000, with core services operated in the Town of Apple Valley, the Cities of Adelanto, Hesperia and Victorville, and nearby areas of San Bernardino County (i.e., Helendale, Lucerne Valley, Oro Grande, Phelan, Pinon Hills, Silver Lakes, and Wrightwood) (NTD, 2012). Service also is provided to the City of Barstow, the City of Colton, the City of Fontana, the City of San Bernardino, and Fort Irwin. VVTA is the second largest local transit provider in San Bernardino County.

### 2.1.6.1 Agency

VVTA is a JPA governed by a five-member board consisting of council representatives from the Town of Apple Valley, the Cities of Adelanto, Hesperia, and Victorville, and one county supervisor. The VVTA Board sets and adjusts fares, approves the budget, approves service changes, and submits federal and state grant applications. VVTA services were initiated in 1993.

### 2.1.6.2 Services

VVTA utilizes a time-transfer system with multiple transfer points. In addition to fixed route service, demand response (i.e., ADA paratransit), deviated fixed route, commuter, intercity, and vanpool services also are provided.

VVTA also provides coordination and management for transportation programs that benefit seniors, persons with low income, and persons with disabilities, and was designated as a Consolidated Transportation Services Agency (CTSA) for the Victor Valley and Upper Desert area by SANBAG in June, 2015. Currently, VVTA is coordinating with St. Mary Medical Center to provide medical transport DAR service from the medical center to alternative health care providers.

Additionally, BAT services merged with VVTA in September, 2014. For purposes of this study, BAT services are discussed separately from VVTA services.

### Routes

Fixed Route service is provided on 15 routes (Routes 31, 32, 33, 40, 41, 43, 44, 45, 46, 47, 48, 51, 52, 53, 54). Service hours are Monday to Friday (6:00 a.m. to 9:00 p.m.), Saturday (7:00 a.m. to 8:00 p.m.), and Sunday (8:00 a.m. to 7:00 p.m.).

To complement the Fixed Route service, Direct Access (ADA paratransit) service is provided, which operates within the ADA service area (i.e., Zones 1 to 3). Service beyond the <sup>3</sup>/<sub>4</sub> mile band around fixed-routes is provided in Zones 2 and 3. Service hours are the same as for fixed route services.

Deviated fixed route (Deviated Route and County Route) services are provided on four (4) routes (Routes 20, 21, 22, and 23). These services include pre-determined routes and stops, but can deviate as far as 3/4 miles off route to pick up passengers with advance reservations. County Route service (i.e., Routes 20-23) is similar to Deviated

Route service (i.e., Routes 40, 46, 47, and 54), but serves outlying rural areas. Deviated Route and County Route services provide for the commingling of general and ADA-certified passengers, increasing the area that VVTA can provide service to the community. Service hours are Monday to Friday (6:00 a.m. to 9:00 p.m.), Saturday (7:00 a.m. to 8:00 p.m.), and Sunday (8:00 a.m. to 7:00 p.m.).

B-V Link service (i.e., Route 15) is provided between Barstow, Victor Valley, and San Bernardino Valley. Limited-stop express service is provided Monday to Friday (7:00 a.m. to 9:00 p.m.), with six trips provided between Barstow and Victor Valley and eight trips provided between Victor Valley and San Bernardino Valley per day. A special fare structure is used for this premium service.

NTC Commuter service (i.e., Routes 101A/B [two routes], 102A/B, 103A/B, 104A/B, 105A/B, 106A/B, and 107A/B) is provided from Victorville to Fort Irwin and from Barstow to Fort Irwin. Service is provided Monday to Friday (4:15 a.m. to 8:12 p.m.), with eight inbound (a.m.) trips to Fort Irwin and eight outbound (p.m.) trips returning to Barstow or Victorville per day.

VVTA also funds and operates a vanpool program. In 2011, SANBAG partnered with VVTA to apply for a \$1,491,000 grant from the FTA to jump-start an ongoing vanpool subsidy program for the greater Victor Valley area. VVTA and SANBAG were successful in obtaining the grant and the program was implemented in September 2012. Under the program, VVTA provides a subsidy of up to \$400 per month for each vanpool, utilizing grant funds. VVTA anticipates reimbursement for these subsidies by the increase in FTA Section 5307 funds that come back to the transit agency approximately two years later as a result of the increase in FTA-reportable passenger miles. At this time, VVTA has approximately 147 active vanpools.

#### Annual System Ridership

In FY2013, VVTA served 1,663,900 fixed route trips, 126,100 demand response (Direct Access) trips, 85,300 deviated fixed route (Deviated Route and County Route) trips, 84,900 commuter trips (including NTC Commuter and B-V Link services), and 191,000 vanpool trips (SANBAG, 2014a).

#### Fares

The VVTA fare structure is shown in Table 2-20. Generally, fares are dependent upon the service type, with reduced fares offered to seniors (60 years and over), persons with disabilities, Medicare recipients, and students (6-13 years and over) (note: VVTA I.D. cards are required for seniors, persons with disabilities, and students [14 years and over]). VVTA provides discounted service to veterans with its VVTA Veterans Pass. Honorably discharged U.S. veterans with a VVTA Veterans Pass, San Bernardino County Veterans identification card, U.S. Department of Veterans Affairs identification card, or U.S. Uniformed Services identification card receive reduced fares upon presentation of required identification to bus operators. Additionally, children 5 years and under are free (i.e., up to three children per paying adult). Cash for the exact price (for each individual trip), or a pass, is required for the selected service. Direct Access (ADA paratransit) service is restricted to riders and attendants with ADA certification; therefore, fares are dependent upon travel between zones (note: eligible riders may bring up to one guest; however, both the eligible rider and the guest must pay the fare, while the eligible attendant is free).

B-V Link service is provided between Barstow, Victor Valley, and San Bernardino Valley; therefore, fares are dependent upon travel between these areas. B-V Link passes, which can be purchased on VVTA buses or at VVTA, can be used on other services, including VVTA and BAT fixed route services but excluding ADA paratransit and dial-a-ride services. Senior/disabled/Medicare passes are available for half the price of full fares.

NTC Commuter service is provided to Fort Irwin, with cash or bus pass fare options. The NTC Commuter Pass, which can be purchased on Fort Irwin only, is available for Mass Transportation Benefit Program (MTBP)-eligible workers, utilizing funds from the federal program. The MEGA Pass, which can be purchased at all VVTA pass sale locations and Barstow City Hall, is intended for the general public and Fort Irwin workers not eligible for the MTBP; as such, senior/disabled/Medicare discounts are provided. Both passes can be used on other VVTA services, including B-V Link service, base fares but not deviated-surcharge fares on deviated fixed-route service, and Direct Access service. The passes are not good on vanpools.

Service Type	Rider Type	Fare Type	Price
		Cash Fare	\$1.25
		Deviated Route	Add \$2.00 to Cash Fare
	Fuil Fare	1-Day Pass	\$3.50
		31-Day Pass	\$50.00
		Cash Fare	\$0.60
Fixed Douto	Soniers/Dischility/Medisors/Veterone	Deviated Route	Add \$1.00 to Cash Fare
Fixed Route	Seniors/Disability/Medicare/Veterans	1-Day Pass	\$1.75
		31-Day Pass	\$25.00
		Cash Fare	\$1.00
	Studente	Deviated Route	Add \$2.00 to Cash Fare
	Siddenis	1-Day Pass	\$3.25
		31-Day Pass	\$40.00
		Cash Fare	\$2.25
	Full Fare	1-Day Pass	\$5.50
		31-Day Pass	\$75.00
	Seniors/Disability/Medicare/Veterans	Cash Fare	\$1.00
County Route		1-Day Pass	\$2.75
		31-Day Pass	\$35.00
		Cash Fare	\$2.00
	Students	1-Day Pass	\$4.50
		31-Day Pass	\$65.00
	Full Fare	Cash Fare	\$12.00
	MTBP Eligible	NTC Commuter Pass (Monthly)	\$245.00
NTC Commuter	Non-MTBP Eligible	MEGA Pass (Monthly)	\$175.00
	Non-MTBP Eligible (Seniors/Disability/Medicare)	MEGA Pass (Monthly)	\$87.50
	Barstow to/from Victor Valley	Cash Fare	\$6.00
D ) ( Link	Victor Valley to/from SB Valley	Cash Fare	\$6.00
B-V LINK	Barstow to/from SB Valley	Cash Fare	\$12.00
	Seniors/Disability/Medicare/Veterans	Cash Fare	1/2-off above
	1 Zone	Cash Fare	\$2.50
Direct Access	2 Zone	Cash Fare	\$4.50
	3 Zone	Cash Fare	\$6.00

### Table 2-20.VVTA Fares

Source: VVTA, 2014

Notes: MTBP = Mass Transit Benefit Program; NTC = National Training Center; SB = San Bernardino

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

Connections to Other Operators

As noted previously, B-V Link service is provided between Barstow, Victor Valley, and San Bernardino Valley, with connections in San Bernardino with Omnitrans and Metrolink, and in Barstow with Barstow Area Transit.

**Contact Information** 

Riders can contact VVTA by email (info@vvta.org), telephone, mail, or in person. All passes and tickets can be purchased in person at the transit authority office, and 31-day passes can be purchased at five other locations. Complaints or inquiries regarding services should be directed to customer service (760-948-4021).

### Mailing/Office Address

VVTA 17150 Smoketree Street Hesperia, CA 92345

Telephone operators for route and schedule information are available Monday to Friday from 5:30 a.m. to 10:00 p.m., and Saturday from 5:30 a.m. to 8:00 p.m. Telephone operators for customer service are available Monday to Friday from 8:00 a.m. to 5:00 p.m.

### 2.1.6.3 Management

VVTA has 13.5 FTE administrative staff. The VVTA Technical Advisory Committee (TAC), a working group for the VVTA Board, reviews agenda items, discusses policy, and provides feedback to VVTA staff. All operations and maintenance activities are performed by Transdev (formerly Veolia Transportation, Inc.), which has a staff of 180 employees. Additionally, Vanpool services are contracted to Enterprise Rideshare and vRide (formerly VPSI).

Staffing for the system is shown in Table 2-21.

Function	Staff	# of Positions
Management	Executive Director	1
	Clerk of the Board/Executive Assistant	1
	Subtotal	2
Deputy Director and Grants	Deputy Director/Grants	1
	Contract Compliance Administrator	1
	Senior Customer Service Rep	1
	Schedule Filler	0.5
	Subtotal	3.5
Finance Department	Finance/Accounting/Controller	1
	Accounting Technician	1
	Subtotal	2
IT Department	IT Manager	1
	Subtotal	1
Marketing Department	Marketing/Civil Rights Coordinator	1
	Subtotal	1
Fleet and Facilities	Fleet and Facility Maintenance Director	1
Department	Fleet Analyst/Procurement/Asset Mgmt Assistant	1
	Subtotal	2
Mobility Management	Mobility Manager	1
	Vanpool Clerk	1
	Subtotal	2
	VVTA Total	13.5
Administrative (Contractor)	General Manager	1
	Assistant General Manager	1
	Transit Supervisors	8
	Reservationist	7
	Dispatcher	3
	Director of Maintenance	1
	Maintenance Manager	1
	Maintenance Admin	1
	Facility Maintenance Supervisor	1
	Safety Manager	1
	Subtotal	25

# Table 2-21. VVTA Staffing

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

Function	Staff	# of Positions
Operations and	Coach Operators	141
Maintenance (Contractor)	"A" Technician	4
	"B" Technician	5
	"C" Technician	5
	Subtotal	155
	Contractor Total	180
	VVTA and Contractor Total	193.5

Table 2-21.	VVTA Staffing	(Continued)
		(Continued)

#### 2.1.6.4 Assets

### MIS/Info Technology

VVTA does not currently have an Information Systems Master Plan or documented decision making process for IT systems. Many of the IT systems are part of the contract with Transdev. IT services is part of operating expenses. The FY 14 estimated budget for IT services is \$88,180. VVTA employs an IT Specialist. In addition, VVTA and Transdev contract IT support from Top Notch, a local firm. VVTA supports more than 37 applications.

Buses are equipped with GPS technology. MyAvail by Avail Technologies is used for AVL functions such as Bus/Route location. It also provides real-time "next bus" information and is available to customers via their mobile devices. MyAvail is integrated with the voice/data radio system, and Google transit for rider trip planning. VVTA's buses utilize General Farebox, Inc. "Odyssey" fareboxes, which is in common with Omnitrans. VVTA currently uses Trapeze for scheduling and dispatching ADA service, another commonality with Omnitrans.

Transdev maintains vehicle and inventory tracking and reporting through double entry onto their and VVTA's Ron Turley Associates (RTA) software. For fixed route, ridership data is collected in two ways. One way is through the GFI farebox that classifies the revenue by date, type, route and run. This is the data used in reporting and is imported into TransTrack. The other method is through the APCs. With the exception of NTC Commuter and Direct Access vehicles, all revenue vehicles are equipped with APCs. The APCs only record boardings and alightings at locations, and do not record fare types. This data is used for passenger load estimation. For Direct Access (ADA service), ridership data is collected by Trapeze and is crosswalked electronically into TransTrack.

INFO POINT, a web application showing VVTA's routes and real time vehicle locations, is used by both customers as well as dispatch to access information related to bus/route location and timing. It is a new service just launched in April 2014.

### Fleet

The VVTA fleet consists of 96 revenue vehicles comprised of 38 40-foot buses, 5 35-foot buses (see Figure 2-12), and 53 cut-a-way vehicles ranging in length from 17-32-feet. The revenue fleet has 63 CNG and 33 gasoline vehicles. Non-revenue vehicles consist of 7 CNG and 15 gasoline vehicles. These vehicles are shown in Table 2-22 and Table 2-23.

Quantity	Manufacturer	Vehicle Year	Vehicle Length	Fuel Type	Vehicle Function	Peak Pull- out Requirement
3	Blue Bird	2001	40'	CNG	MB	
4	NABI	2002	40'	CNG	MB	
2	NABI	2004	40'	CNG	MB	
7	NABI	2008	40'	CNG	MB	
6	NABI	2010	40'	CNG	MB	
5	El Dorado	2014	40'	CNG	MB	
5	Blue Bird	2006	35'	CNG	MB	22
2	El Dorado	2008	27'	Gasoline	MB	
2	El Dorado	2009	32'	Gasoline	MB	
6	GLAVAL	2011	32'	CNG	MB	
2	El Dorado	2012	32'	CNG	MB	
4	El Dorado	2013	32'	CNG	MB	12
2	El Dorado	2009	32'	CNG	COMMUTER	
2	New Flyer	2000	40'	CNG	COMMUTER	
3	New Flyer	2001	40'	CNG	COMMUTER	
1	Blue Bird	2001	40'	CNG	COMMUTER	
5	NABI	2001	40'	CNG	COMMUTER	9
8	BRAUN	2010	17'	Gasoline	ADA	
1	El Dorado	2005	24'	Gasoline	ADA	
2	El Dorado	2007	24'	Gasoline	ADA	
8	El Dorado	2011	24'	Gasoline	ADA	
6	ARBOC	2010	26'	CNG	ADA	
9	STARCRAFT	2008	24'	Gasoline	ADA	
1	STARCRAFT	2010	24'	Gasoline	ADA	27
Total						
96						70

Table 2-22.	<b>VVTA Fleet:</b>	Revenue	Vehicles
-------------	--------------------	---------	----------

Source: Notes: SANBAG, 2014a

CNG = compressed natural gas

Quantity	Manufacturer	Vehicle Year	Fuel Type	Vehicle Function
1	Ford F-150	2003	Gasoline	SUP
1	Ford	2000	Gasoline	SUP
2	Ford	2005	Gasoline	SUP
2	Honda	2007	Gasoline	SUP
1	Ford	2007	Gasoline	ADMIN
2	Ford	2008	Gasoline	SUP
1	Chevrolet	2008	Gasoline	SUP
1	Ford	2011	Gasoline	SUP
2	Ford	2012	Gasoline	ADMIN
4	Honda	2011	CNG	SUP
1	Ford	2012	Gasoline	ADMIN
3	Honda	2013	CNG	SUP
1	Ford F-150	2014	Gasoline	ADMIN
Total				
22				

Table 2-23. VVTA Fleet: Non-revenue Vehicles

Notes: CNG = compressed natural gas

 Ling
0
199

### Figure 2-12. VVTA Revenue Vehicle

Fuel

VVTA has both CNG and gasoline available on site. Southwest Gas provides natural gas via pipe line and is compressed by VVTA's three CNG compressors (see Figure 2-13). Transdev has a certified CNG technician available for station maintenance.



### Figure 2-13. VVTA CNG Fuel

CNG compressors

CNG dispensing lanes

### Facilities

VVTA operates from a single facility located in Hesperia, CA (Figure 2-14). The facility includes a multi-bay maintenance and operations building along with fueling and wash stations. The bus parking area and employee parking areas are covered and contain solar panels for electrical generation. VVTA is a net electrical provider to the local electrical grid.





VVTA facility entrance

Covered parking with solar panel roof

Other Assets

# 2.1.6.5 Maintenance

Transdev provides vehicle and facility maintenance in accordance with their contract. Major and complex repairs are contracted. Figure 2-15 depicts the VVTA Repair shop.



### Figure 2-15. VVTA Repair Shop

### Facility

Transdev performs all preventive and routine maintenance and contracts major repairs. Landscaping and cleaning of solar panels are contracted.

#### Vehicles

Transdev performs all preventive and routine maintenance and contracts out major repairs to include engine and transmission replacements. Practices and procedures are documented and are in accordance with OEM and statutory requirements. Major repairs are contracted through OEM and local vendors.

#### Bus Stop Signs and Shelters

VVTA purchases and contracts for installation of bus stop signs and shelters. The towns/cities are responsible for installation, maintenance, and cleanliness.

# 2.2 Other Transportation Agencies

### 2.2.1 SANBAG

SANBAG (San Bernardino Associated Governments) serves San Bernardino County, which includes 24 incorporated cities or towns (i.e., Adelanto, Apple Valley, Barstow, Big Bear Lake, Chino, Chino Hills, Colton, Fontana, Grand Terrace, Hesperia, Highland, Loma Linda, Montclair, Needles, Ontario, Rancho Cucamonga, Redlands, Rialto, San Bernardino, Twentynine Palms, Upland, Victorville, Yucaipa, and Yucca Valley) and unincorporated areas of San Bernardino County. SANBAG is a Council of Governments (COG) and transportation planning agency.

### 2.2.1.1 Agency

SANBAG was created as a COG in 1973. Since then, it has been designated to serve as several additional authorities, organized under the umbrella of the COG, including:

- County Transportation Commission (CTC)—SANBAG is responsible for short- and long-range transportation planning within San Bernardino County, including coordination and approval of all public mass transit service, approval of all capital development projects for public transit and highway projects, and determination of staging and scheduling of construction relative to all transportation improvement projects in the Transportation Improvement Program.
- County Transportation Authority—SANBAG is responsible for administration of Measure I, the voter approved half-cent transportation transactions and use tax which is estimated to generate almost \$4.5 billion through 2040 for funding of major freeway construction, commuter rail service, local street and road improvements, special transit service for the elderly and disabled population, and traffic management and environmental enhancement efforts.
- Congestion Management Agency—SANBAG manages the performance level of the regional transportation system in a manner that ensures consideration of the impacts from new development and promotes air quality improvements through the implementation of strategies in the adopted air quality plans.
- Subregional Planning Agency—SANBAG represents the San Bernardino County subregion and assists the Southern California Association of Governments in its role as the metropolitan planning organization. SANBAG performs studies and develops consensus relative to the regional growth forecasts, regional transportation plans, and mobile source components of the air quality plans.

SANBAG is governed by the mayor or a councilmember from each of the 24 cities/towns and five San Bernardino County Board of Supervisors.

### 2.2.1.2 Services

SANBAG does not operate (either directly or through contract) any transit services at this time. However, SANBAG funds and sits on the Board of Directors for the Southern California Regional Rail Authority (SCRRA), and provides input and direct support to the Metrolink commuter rail services in San Bernardino County. SANBAG also conducts long-range transportation planning, including the regional rail network.

SANBAG has three significant transit projects in design or construction. SANBAG is constructing an extension of the Metrolink service from its current terminus at the historic Santa Fe Depot to a new Downtown San Bernardino Transit Center, approximately one mile to the east. The project, known as the Downtown San Bernardino Passenger Rail project, will provide direct rail service to downtown San Bernardino for Metrolink riders without need to transfer to local bus service at the Depot. This project's capital budget is \$103.9 million and it is expected to be open for use in 2016 (SANBAG, 2014b).

Second, SANBAG, working with Omnitrans, constructed the new downtown San Bernardino Transit Center at Rialto and E Streets, which will serve as the new terminus for METROLINK service and provide 22 bus bays for a new downtown bus transfer facility. The facility opened for service in September, 2015. The project provides convenient intermodal transfers. This project was budgeted at \$23.5 Million

Third, SANBAG completed environmental clearance and is conducting final engineering for the Redlands Passenger Rail Project. This project will implement passenger rail service between the new downtown transit center and the University of Redlands, approximately nine miles to the east, along the Interstate 10 corridor. The project budget is estimated at \$242.9 million in capital costs and is expected to open for service in 2019. SANBAG has not yet determined the precise vehicle type or who will operate the service (SANBAG, 2014b). Use of conventional commuter rail rolling stock or diesel-multiple-unit trains are among the options being considered. The environmental documentation calls for the service to provide 30-minute headways during peak periods and hourly headways at other times (SANBAG, 2012b).

### Programs

One of the essential roles for SANBAG as the County Transportation Commission, in addition to transportation planning and programming responsibilities, is the allocation of state and federal funds to high priority transportation projects in the county. Once the SANBAG Board approves the allocation and the project is added to the appropriate programming document, the lead agency is responsible for applying for funds through SANBAG or state or federal agencies and is responsible for meeting eligibility requirements. State funds allocated by the SANBAG Board do not flow through the SANBAG budget unless SANBAG is the lead agency for project implementation. SANBAG does allocate federal funds; however, SANBAG is not a FTA recipient and is unable to receive FTA funds directly. In these cases, SANBAG works with Omnitrans to pass the funding to SANBAG.

Contact Information

SANBAG staff can be contacted by email, telephone (909-884-8276), fax (909-885-4407), mail, or in person.

### **Office Address**

1170 W. 3<sup>rd</sup> Street, 2nd Floor San Bernardino, CA 92410-1715

### 2.2.1.3 Management

SANBAG employees are divided into the following program areas, under the management of the SANBAG Board of Directors and Executive Director, as shown in Figure 2-16. Senior management staff lead employee groups in each program area.



Figure 2-16. SANBAG Management

Source: SANBAG, 2013

## 2.2.2 Valley Transportation Services

Valley Transportation Services (VTrans) serves as the Consolidated Transportation Services Agency (CTSA) for the San Bernardino Valley, within the Valley Subarea (Figure 1-1). VTrans also provides other coordinated program assistance throughout the County territory.

### 2.2.2.1 Agency

VTrans is a non-profit transportation corporation, and while its function as CTSA is limited to the Valley region, VTrans provides coordination and management for other transportation programs in the county, benefitting seniors, persons with low-income, and persons with disabilities. In 2010 the SANBAG Board identified a need for a CTSA in San Bernardino Valley, and through the reauthorization of Measure I, and recommendations in the *Public Transit-Human Services Transportation Coordination Plan for San Bernardino County* (SANBAG, 2007), VTrans was created. The seven member VTrans Board of Directors is comprised of 3 members appointed by SANBAG, 2 members appointed by Omnitrans, and 2 members appointed by the County of San Bernardino. The potential components of the CTSA role include partnering with human services, creating agency-provided services, expanding senior programs, and providing travel training

### 2.2.2.2 Services

The mission of VTrans is to improve the quality of and create mobility solutions involving transportation services for seniors, persons with disabilities, and persons of low-income through coordination of transportation services with human service organizations, public agencies, or private providers (VTrans, 2014). VTrans does not operate transit services at this time. However, VTrans is establishing a centralized preventative vehicle maintenance facility in Ontario which will provide a maintenance resource for social service agencies operating their own vehicles.

### Programs

<u>Travel Training</u>: VTrans provides travel training to eligible individuals, teaching them how to use the public transportation system in the valley. Through one-on-one or group training, these individuals learn how to understand route maps, stops, and schedules; get to and from bus stops safely; pay fares and purchase passes; board, ride, and exit the bus safely; and transfer to other buses. Through this program participants are able to access their community for work, school, medical appointments, and recreational opportunities. Travel Training is currently funded by SAFETEA-LU JARC and New Freedom grants and Measure I Senior and Disabled matching funds.

<u>Transportation Reimbursement Escort Program (TREP)</u>: VTrans manages TREP for rural San Bernardino County. This program was previous managed by the Department of Aging and Adult Services (DAAS). This program only covers rural areas of the county and is funded, in part, by rural New Freedom grants, which are administered through Caltrans. Additionally, the local transportation providers (VVTA, BAT, MARTA, and MBTA) in the past allocated some of their Measure I funds to this program and some
continue to do so, including VVTA. VTrans works with VVTA for TREP funding and administration. TREP is an incentive program for volunteer drivers to assist eligible individuals by providing necessary escorted transportation. These individuals, who are unable to drive or access public transportation, can receive mileage reimbursement for their volunteer drivers (usually friends or neighbors), offsetting some of the cost associated with providing transportation and thereby providing increased mobility.

<u>VTrans Agency Partnership Programs</u>: VTrans, working with Omnitrans to identify the most frequent users of ADA paratransit services, has successfully partnered with several San Bernardino Valley-area social service agencies and other non-profit organizations to provide cost-effective alternative transportation services. Using FTA JARC/New Freedom grants and Measure I funds, VTrans has been able to provide support and funding, including grant matching funds, to improve transportation options and programs to Community Connections (a Volunteer driver program to assist seniors and persons with disabilities), Loma Linda Adult Day Health (providing a transportation program for its senior clientele), Pomona Valley Workshop (providing a transportation program for its disabled workshop participants), and Central City Lutheran (providing a transportation programs would be using Omnitrans Access service if these services were not available.

Inland Empire 2-1-1: VTrans, working with SANBAG, provides matching funds to support the IE211 "One-Click, One-Call" program being developed by United Way. IE211 is part of a nation-wide transit needs program for US Veterans.

In addition to their current programs, VTrans is in the process of initiating several new programs this year, including a Taxi Voucher Program for eligible individuals, expansion of TREP into the east valley, and opening a vehicle Maintenance Facility (see Section 2.2.2.4) to provide services to its partner agencies.

#### Contact Information

Riders can contact VTrans by email (info@vtrans.us.com), telephone (909-981-5099), fax (909-981-2299), mail, or in person. Office hours are Monday to Friday from 8:00 a.m. to 5:00 p.m.

### Address

299 W. Foothill, Suite 202 Upland, CA 91786

2.2.2.3 Management

VTrans staff, including staff for the TREP/Taxi and Travel Training Programs, is shown in Table 2-24. For the TREP/Taxi Program, staff salaries are 100 percent grant funded.

Function	Staff	# of Positions
General Management	Chief Executive Officer	1
	Administrative Manager	1
	Administrative Assistant	1
	Subtotal	3
Maintenance	Maintenance Manager	1
	Mechanic	1
	Subtotal	2
TREP/Taxi <sup>1</sup>	Program Administrator	1
	Client Relations Coordinator	1
	Subtotal	2
Travel Training	Travel Training Manager	1
	Travel Trainers	4
	Subtotal	5
	Management and Administrative Total	12

## Table 2-24. VTrans Staffing

Source: SANBAG, 2014a

Notes: <sup>1</sup> For the TREP/Taxi Program, staff salaries are 80 to 100 percent grant funded, depending on program. Travel Training is also 80 percent grant funded.

### 2.2.2.4 Assets

**MIS/Info Technology** 

VTrans is not an operating agency, so it lacks many of the traditional IT systems that a transit agency might have. For its Travel Training and TREP Programs, VTrans, in partnership with Paratranist, Inc., has developed and houses extensive databases. For its Taxi Voucher Program, VTrans will use an outside vendor. Additionally, a contractor is used to provide IT services.

VTrans has one network including two hard drives which are housed at the Upland location. Quickbooks is used for all accounting. VTrans has an annual budget for computer supplies and software of \$15,000 (FY14/15). The agency has acquired "ManagerPlus" software for managing vehicle maintenance once the new preventative maintenance facility opens. ManagerPlus is integrated with the maintenance work order system and parts can be issued and tracked to individual bus numbers (see http://managerplus.com/maintenance-software). There is no dedicated IT staff.

### Fleet

VTrans currently does not have any fleet of its own. They are exploring the possibility of acquiring retired Omnitrans Access vehicles and refurbishing them to use as spares for

social service agency needs while agencies have their vehicles in for maintenance or repairs at the new maintenance facility.

Facilities

VTrans has leased an existing industrial building at 1044 Brooks Street, Ontario, and is completing tenant improvements to use the building as a centralized preventative maintenance facility for partnering social service agencies (Figure 2-17). VTrans will offer standard preventative maintenance services (A-, B-, C-inspections), brake work, and some "R and R" (remove and replace) work. They will also maintain vehicle maintenance records for the agencies using their services. Two significant social service agencies have already entered into agreements with VTrans to have their vans maintained there.





Outside



Inside

# THIS PAGE INTENTIONALLY LEFT BLANK

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

# 3.0 FUNCTIONAL ASSESSMENT OF THE TRANSIT AGENCIES

In order to identify commonalities among the transit agencies in the way they organize and provide transit services, a detailed Questionnaire was completed by each agency. The Questionnaire covered six functional areas, as follows:

- Agency Overview (see Table 3-1)
- Current Transit Services Provided (see Table 3-2)
- Service Planning (see Table 3-3)
- Operations and Administrative Support Functions (see Table 3-4)
- Management Information Systems/Information Technology (MIS/IT) (see Table 3-5)
- Fixed Asset Review (see Table 3-6)

Following receipt and review of the Questionnaires, the study team conducted site visits of each transit agency to obtain clarifications and ask follow-up questions to provide a complete picture of each agency's operations. Meeting summaries of those site visits are included in the Appendix to this report.

The information from this process was then summarized in the attached matrices, grouped into the six key areas. The following discussion summarizes and analyzes the findings for each functional area. The tables are provided at the end of this section.

# 3.1 Agency Overview

Table 3-1 summarizes the information collected from the "Agency Overview" portion of the Questionnaire, supplemented by site-visit information and discussions. As noted at the beginning of this report and in the table, San Bernardino County's transit operators vary dramatically in service area population and annual ridership, with Omnitrans being by far the largest operator with a service area population of 1.4 million and over 16.1 million annual passengers, while the City of Needles is the smallest with a service area population of 4,800 and 34,153 annual passengers.

All six of the transit operators provide some form of fixed-route service, though some of the services provided by Morongo Basin Transit Authority (MBTA) and Victor Valley Transit Authority (VVTA), and all of the services provided by the City of Needles utilize a "deviated fixed route" method of operation, in which the fixed-route bus can deviate off route up to 3/4-miles to pick up passengers and thereby satisfy both fixed-route and ADA service requirements with the single service type. Omnitrans also provides Bus Rapid Transit service on its new sbX Green Line service. VVTA, MBTA, Omnitrans, and Mountain Area Regional Transit Authority (MARTA) all provide some form of commuter or long-distance/intercity service that connects their services with larger metropolitan areas, such as San Bernardino (VVTA and MARTA), Riverside (Omnitrans), or Palm Springs (MBTA). With the exception of Omnitrans, all of the operators also provide some form of general public dial-a-ride in certain communities within their service areas.

Another notable service is VVTA's vanpool program, which currently has approximately 147 active vanpools, which originate or terminate within the VVTA and BAT service areas. The San Bernardino Associated Governments (SANBAG) is presently working to expand the benefits of regional vanpooling county-wide.

#### Funding

In terms of funding sources, in addition to fare revenues, all of the transit operators utilize some form of federal funding to support operations and/or capital programs. Omnitrans and VVTA receive Federal Transit Administration (FTA) Section 5307 Urbanized Area Formula Grants, and all of the operators, except Omnitrans, receive FTA Section 5311 Non-Urbanized Area Formula Grants, which can be used for operating and capital expenses. In California, FTA Section 5311 funding is administered by the State Department of Transportation as the designated grantee. All of the operators also receive Transportation Development Act (TDA) Local Transportation Funds (LTF) and State Transit Assistance funds, and are heavily dependent on these sources for a large share of their budgets. All of the operators receive support from San Bernardino County's Measure I, administered by SANBAG. VVTA has the most funding sources and no grant administration department or employees.

#### Opportunities for Coordination and Cost Efficiencies

A major focus of this study is to identify commonalities among the San Bernardino County transit operators in the manner in which they organize and provide services, in order to identify opportunities for increased coordination and/or cost efficiency. The Questionnaire, and follow-up discussions during the site visits, included specific questions regarding current areas of coordination and areas which senior management at each agency saw further coordination opportunities. These opportunity areas and the transit agency responses are displayed in the third page of Table 3-1. The responses have been color coded to enable the reader to scan for areas of best opportunities, with green shading denoting items where the agencies either currently coordinate or support coordination, yellow shading denoting items where the agencies may support coordination depending on certain factors, and red shading denoting items where the agencies did not feel coordination would work.

One significant area where all the agencies are currently coordinating effectively is in the procurement of buses. Omnitrans coordinates with other non-San Bernardino County transit agencies for procurement of full-size buses; the other agencies are coordinating through use of the CalACT/MBTA bus procurement program. MBTA has shown significant leadership in this area, having worked with the state and FTA to create a federal-rules-compliant bid process where participating agencies can obtain vehicles from large-quantity bus bids, with likely far better pricing than the smaller agencies would obtain if they went out on the market on their own for small-quantity bus procurements. Each of the transit agencies also has one or more transfer or interagency agreements in place with other agencies, though this area can be further developed and improved.

Significant areas where agency leaders see opportunities for future coordination include the following:

Operations and Maintenance:

- Bus Parts Four agencies, including Valley Transportation Services (VTrans), saw opportunities for joint bus part procurements. MBTA felt there may be an opportunity here also, depending on if the mix of parts available through such a program could meet their specific fleet needs. MBTA currently buys some parts through the State Department of Governmental Services and feels they receive good value through that program.
- Fuel Procurement of compressed natural gas (CNG) fuel on a pooled-basis represents a potentially significant opportunity, if certain conditions are met. Four of the six transit operators currently use CNG (MARTA uses gasoline and diesel; the City of Needles uses gasoline). However, Omnitrans and Barstow Area Transit (BAT) obtain CNG via trucked-in LNG (Liquefied Natural Gas), with a conversion plant converting the LNG to CNG for use in the buses. Omnitrans explained that they went with LNG due to nearby neighborhood concerns with Methyl Mercaptan, an odor-causing CNG additive. However, Omnitrans staff estimated that using LNG instead of CNG is costing them up to \$0.51 more per gallon-equivalent than if they could use CNG. This may be an area worth exploring further for potential cost savings, even if only at one of the two Omnitrans yards. In July, 2014, Omnitrans issued a Request for Proposals for a consultant to prepare a feasibility study that examines the possible change from its current practice of storing its LNG in tanks versus investing in new infrastructure, including pipelines. VVTA and MBTA already use CNG with natural gas coming directly from the utility (Southwest Gas for VVTA and Southern California Gas for MBTA).
- Tire Contracts Three of the agencies saw potential opportunities in bidding a joint tire lease contract.
- Heavy Overhaul/Repair and Body Repair/Painting Services Three agencies saw potential opportunities for joint contracting for these services, for example, when complete engines need to be sent out for overhaul. Omnitrans also indicated the potential to provide such services to the smaller agencies.
- Emergency/Out-of-Area Mutual Aid An interesting coordination opportunity identified by MARTA, and potentially also applicable to VVTA and MBTA, would be to enter in to emergency/mutual aid agreements with Omnitrans (or Sunline Transit Agency in the case of MBTA) to support the agencies services that travel long distances to San Bernardino or Palm Springs and incur accidents or breakdowns. The cost and time for the home base of MARTA, MBTA, or VVTA to service accidents or breakdowns that occur far from their primary service areas is significant, and creates a major inconvenience to passengers. If Omnitrans could support such situations on a cost-reimbursement basis (or Sunline Transit Agency in the case of MBTA), service losses and passenger inconveniences could be minimized. Such inter-agency agreements are common in the commuter rail sector of public transit, where extreme distances

create the same challenges. Omnitrans currently provides mutual aid to Metrolink in the form of a Bus Bridge Agreement.

Management and Operations/Maintenance Administration:

- ADA Eligibility Determination/Certification The cost to the transit agencies • for those providing complementary Americans with Disabilities Act (ADA) paratransit service is significant. For example, Omnitrans' FY14 budget for Access service is nearly \$10 million, and ADA ridership is rising 2 percent to 6 percent per year, increasing year over year costs at a significant rate (Omnitrans, 2014b). OmniConnects, Omnitrans' recently adopted Short-Range Transit Plan (SRTP), states that Access service generates only 2.9 percent of Omnitrans' system ridership but accounts for 17.5 percent of Omnitrans' total budget (Omnitrans, 2014b). Thus, it is of vital importance that all of the agencies providing complementary ADA paratransit service ensure that only eligible and certified patrons use the service. Passengers who are capable of using regular fixed-route service, even on a conditional (by trip type/purpose) basis, should not use the costly ADA service, where the agency costs per passenger can be \$26 each or more, depending on the agency. As shown later in Table 3-2, each transit operator currently uses their own certification system, and most are paperbased and thus subject to potential misuse. (VVTA uses "ADA Ride", an on-line ADA Certification vendor, who reviews paper-based application materials.) VTrans has recommended development of an in-person assessment process to ensure only eligible patrons are certified. While such systems are far more costly upfront, they could save significant dollars in the long run when one considers the per passenger cost of conventional ADA paratransit service. OmniConnects identifies this as an important issue and indicates that discussion with VTrans on an in-person assessment system are on-going (Omnitrans, 2014b). This area offers potentially significant cost savings to the region and will be explored further in this study.
- **Civil Rights Compliance** The smaller agencies lack dedicated staff for many functions of a typical transit agency and would appreciate support on items such as this.
- Marketing/Regional Marketing and Regional Transit Information/Customer Service – Several of the agencies saw value in forming a regional effort to market transit services and transit information, particularly for agencies which provide cross-jurisdictional services, such as VVTA and MARTA. While such efforts may not save money in the short run, they could contribute to ridership and long-term service productivity improvements, and improve information available to the customer.
- Service Planning/Analysis Only Omnitrans has dedicated service planning staff, yet all of the transit operators are faced with the day-to-day issues of managing service quality and reliability. Several of the smaller agencies indicated a desire for service planning support from SANBAG, or perhaps from Omnitrans, so that service problems could be addressed in a more-timely

manner than once every 5 years when a new comprehensive operational analysis (COA) or SRTP is written, thereby benefiting service quality and the customer. Omnitrans leadership indicated they would be willing to consider staff resource sharing in this area if appropriate cost reimbursements could be worked out.

Staff Training and Development – All of the agencies indicated willingness to
participate in on-going staff training and development opportunities. Omnitrans
has significant depth in several areas of importance to the agencies, including
Procurement, IT, Planning, Marketing, and Grants Management, and indicated a
willingness to sponsor training for staff of the other agencies if interest is shown.
Such training could help improve the staff capabilities at the smaller agencies,
contributing to enhanced productivity.

# 3.2 Current Transit Services Provided

Table 3-2 lists information on "Current Transit Services Provided" obtained from the agency Questionnaires.

#### Service Hours

The first portion of this table lists service day and hour details for each of the services offered by the transit operators.

### Service Delivery

The second portion of this table provides details on service delivery approaches. Omnitrans, MBTA, and MARTA are directly-operated systems (except for Omnitrans' ADA service and a small amount of fixed-route service), while VVTA, BAT, and the City of Needles are contract operations. This is an important point for this study; in the contract operations, such as VVTA, many cost items are rolled up into the hourly rate charged by the contractor to the agency and thus joint procurement of such items may not make sense for the contracting properties. Fuel, on the other hand, is typically purchased separately by the agency, regardless of the method of service delivery, and thus offers a potential opportunity. Similarly, some contracts, such as VVTA's, may exclude the cost of heavy overhauls or treat such items as "extra work," indicating a potential coordination opportunity.

Additionally, it is important to note that, of the four agencies that have all or some portion of their services being contracted, a different operating contractor is in place at each agency. First Transit, Inc. operates Omnitrans' *Access* service and some limited fixed-route service; Transdev operates VVTA services; MV Transportation, Inc. operates BAT service (until merger with VVTA's services); and McDonald Transit Associates operates Needles Transit Services (NTS) for the City of Needles. Thus, short of canceling one of these contracts, there is limited near-term opportunity for cost savings through combining some of these contracts under one contractor, with the exception of BAT. One such opportunity is the consolidation of BAT service with VVTA services, as is currently under way, to be operated by Transdev.

Also, there was little support for joint service contracting among the agencies when this issue was discussed.

## Service Characteristics

Two other service issues explored through the Questionnaire were peak-to-base ratios and dispatching hours. There are overlaps in the service day among the operators; however, most indicated they typically run a base level of service most of the day, so inter-agency agreements to jointly operate peak services are probably not a promising opportunity. One limited exception might be if, at some point in the future, crossjurisdictional services (such as VVTA's B-V Link service or MARTA's "Off the Mountain" service) develop enough bi-directional demand for two agencies to operate the services, with service starts from each service area. VVTA also is exploring the possibility of operating some of its Fort Irwin service from Barstow's yard to cut down on deadhead cost, once the agency merger has occurred.

Joint dispatching likely is not an area worth pursuing. Omnitrans has already curtailed dispatching hours at its West Valley Facility, with only the East Valley Facility handling the full service day. The other operators have more limited service day spans. Furthermore, dispatching tends to be an integral part of a transit operation, particularly at the small properties, where the dispatcher may be doubling as the reservationist for diala-ride, the data collector for radioed-in ridership and schedule performance information, and even the Customer Service representative. The breadth of these duties at the smaller properties limits the feasibility of conducting joint dispatching.

### ADA Service

As shown in Table 3-1, the ADA complementary service area offers potential coordination and cost savings opportunities. In addition to coordination or combined ADA certification processes, the use of taxis for certain late-evening trips or to help manage demand peaks is an opportunity worth exploring. VTrans is developing a taxi voucher program for eligible individuals, utilizing 25 percent Job Access Reverse Commute funds. The program will provide work and work-related trips to eligible individuals (e.g., interview trips, medical trips, and trips for other life sustaining and enriching activities). The program will utilize a reloadable debit card system for participants to load their 50 percent share of the taxi fare using a debit or credit card. Programs like this, if designed with appropriate controls, offer the potential to reduce costly ADA paratransit trips and shift them to a more-cost effective mode. To fully realize these savings, the *Access* contract would need to reduce service hours accordingly.

# 3.3 Service Planning

Table 3-3 summarizes Questionnaire responses regarding "Service Planning."

### Planning Staff

As mentioned previously, only Omnitrans among the transit operators (and SANBAG in the "Other Agencies" group), currently have dedicated planning staff. At the smaller agencies, the operations manager, operating contractor staff, or even the executive

director/general manager may take on service planning duties. The smaller agencies indicated that having access to on-going service planning staff support would help them in addressing route evaluation, service demand, on-time performance, and related issues, on an on-going basis rather than only when a consultant-led SRTP or COA process is under way. More proactive service planning should lead to higher quality service and, hopefully, increased ridership and customer satisfaction. Customer concern about on-time performance was identified in some of the past COA's at the smaller transit agencies.

This may be a role that SANBAG should consider staffing, or possibly Omnitrans on a cost-reimbursement basis.

Goals, Objectives, Standards

All of the transit operators have identified goals, objectives, and service standards in their most recent SRTP or COA. However, the smaller agencies may be measuring service performance against these standards on a quarterly or, perhaps, annual basis, rather than monthly. This again reflects the lack of dedicated service planning staff.

#### Public Outreach Efforts

All of the agencies conducted public outreach efforts in conjunction with their most recent SRTP or COA development. At the smaller agencies, public outreach related to service changes may occur annually during the TDA-required Unmet Needs public hearing, for those agencies not utilizing all of their LTF monies. If service planning staff is assigned to support the smaller transit agencies, it is likely that service change proposals would be generated, leading to public hearings for service changes, possibly up to three times a year.

### Ridership and On-Time Performance Data

Methods for obtaining ridership and on-time performance at the agencies varied greatly. Omnitrans and VVTA have both registering fareboxes that count fares and ridership by trip, and Automatic Passenger Counters (APCs) on at least a portion of their fleets to obtain ridership by bus stop/location. At the smaller agencies, drivers count ridership manually, or, for dial-a-ride service, it may come from trip manifests. MBTA supplements the manual tallies with periodic separate surveys to collect bus stop boarding data. For the City of Needles, the contractor's local manager is responsible for on-time performance monitoring on that system.

Omnitrans and VVTA both have GPS/AVL (Global Positioning System/Automatic Vehicle Locator) equipment on-board their buses (though from two different vendors) which produce automated on-time performance reports by route for evaluation by staff. Field supervisors supplement this data with field observations. The smaller agencies must rely on field supervision and/or radio calls from their drivers to determine on-time performance.

Title VI Compliance Policy and Process

Title VI procedures varied widely at the transit agencies, again a reflection of the presence or lack of dedicated planning staff. SANBAG in the past has used its consultants to help the smaller agencies create a Title VI program. Omnitrans has a full Title VI Compliance Policy and procedure for Title VI analysis for major service changes and fare changes. MBTA also has a Title VI program document, last updated in June 2013, designed for operators with less than 50 peak buses and area population under 200,000. The City of Needles recently updated its Title VI policy and procedures and posted them on the city website. Title VI program status at the other transit agencies was less clear based on the information provided in the Questionnaire. Given the recent Title VI program changes issued by the FTA in October 2012 (FTA, 2012), this is an area that would benefit from near-term coordination among the transit agencies to ensure all are in compliance.

# 3.4 Operations and Administrative Support Functions

Table 3-4 provides study findings on the "Operations and Administrative Support Functions" at the transit agencies. As with the other areas being reviewed, there is huge variation in staffing levels among the San Bernardino County transit operators.

Direct Agency Personnel

The first portion of the table summarizes the management and administrative staffing levels (agency personnel) at each agency. Details on the specific positions at each agency are provided in the agency-by-agency review in Chapter 2.0 of this report.

Omnitrans has by far the largest number of in-house management and administrative staff positions, at 156. Omnitrans has depth in all areas traditionally staffed in a medium to large transit agency. In addition, Omnitrans has 396 coach operators and 82 maintenance employees.

The other transit agencies all employ far lower levels of management and administrative staffing, as well as operating employees (either direct or through their contractor), as shown in Table 3-4. Agency management and administrative staffing at those agencies ranges from a high of 13.5 at VVTA, down to one position at BAT and one-tenth allocated position at the City of Needles. VVTA has a significant size operation relative to its staffing level and relies on its operations and maintenance contractor for support. The low administrative staffing level at the smaller agencies points up the value of looking for training and resource sharing opportunities among the San Bernardino County transit agencies.

**Contract Operations and Maintenance Personnel** 

Omnitrans contracts for its ADA Paratransit and some limited fixed-route service; the contractor's operation employs 43 positions in management, administration, and operations management, and 164 drivers and maintenance workers. VVTA's operating contractor employs 25 positions in management, administration, and operations management and 155 coach operators and maintenance workers. BAT's operating

contractor employs seven management and administrative positions and 24 coach operators and maintenance workers. For the City of Needles, the operating contractor employs two management employees and two full-time drivers, with two more part-time drivers provided by the city for dial-a-ride services. NTS maintenance services are provided by a sub-contractor for the fixed-route system and by a city mechanic for the dial-a-ride vehicles.

## Non-Operating Agency Personnel

Among the non-operating agencies, SANBAG currently employs five staff in its "Transit and Rail Programs" group, of which two provide transit program oversight. This small group coordinates and approves all transit operating and capital programs in the county in SANBAG's role as County Transportation Commission. VTrans employs a staff of 12 personnel in its role as Consolidated Transportation Services Agency (CTSA) for the Valley sub-area, five of which are associated with the Travel Training Program.

There may be cost-savings opportunities in staffing levels at some of the agencies. It is recommended that such discussions be held separately with each affected agency rather than addressing the subject in this report.

# 3.5 Management Information Systems/Information Technology

Table 3-5 summarizes the study findings regarding "MIS/IT" at the transit agencies. The study team performed a review of existing MIS and IT systems in use at the transit agencies, as documented earlier under each individual agency's discussion section. The team found a wide range of systems and applications in use, from enterprise-wide and sophisticated systems at Omnitrans, to the use of little more than Excel spreadsheets at the smallest operators.

As noted in Table 3-5, only one of the transit operators has an MIS Master Plan or IT decision making process. Only Omnitrans and VVTA have dedicated IT staff. In Operations, VVTA and Omnitrans both use Trapeze for demand-response and/or fixed-route scheduling; the rest of the agencies have no formal service scheduling software and instead use a variety of manual, Excel-based, or in one case, a TransTrack-based module for the client database. There are no commonalities among the agencies in fleet maintenance/management software. There are no commonalities in the Finance/Accounting area except for use of Quickbooks by two of the smaller agencies.

In the systems areas, the only significant commonality was the use of GFI Odyssey fareboxes by both VVTA and Omnitrans. BAT has seven GFI "Cents-a-Bill" fareboxes used for fare collection only, with no data functions in use. Omnitrans and VVTA also both have a "NextTrip" type technology, but from two different vendors.

As a result, there are relatively few opportunities for cost sharing or cost efficiency in the MIS/IT areas. Some limited possibilities may include the following:

• Joint acquisition of farebox parts for the GFI fareboxes used by Omnitrans and VVTA, and possibly BAT, which can be expensive, depending on whether such an arrangement

could save money given the two different service delivery models of these agencies (direct-operation vs. contract-operation).

• Possibility of a combined maintenance contract for Trapeze Scheduling software maintenance between Omnitrans and VVTA. On this latter point, Trapeze would have to be amenable to such an arrangement, given the separate system licenses in place.

## 3.6 Fixed Asset Review

Table 3-6 summarizes the "Fixed Asset Review" portion of the Questionnaire, covering vehicles and facilities.

As shown in this table, Omnitrans and VVTA operate full-size 40-foot (and in Omnitrans' case, 60-foot articulated) coaches, and their maintenance facilities are designed and sized to accommodate these fleet types. Omnitrans' ADA Paratransit service and some limited local fixed-route service utilize cutaways, which are operated by their contractor, First Transit, Inc. VVTA has a sizable cutaway bus fleet, used on lower-demand routes and ADA service. MBTA has four 35-foot heavy duty coaches; the rest of their fleet and that of MARTA, BAT, and the City of Needles operate with cutaways.

CNG is used for substantial portions or all of the fleets at Omnitrans, VVTA, BAT, and MBTA. MARTA and the City of Needles use gasoline or diesel.

Investigation and conversation with the respective SANBAG member transit agencies resulted in identifying several functions in which combining efforts could result in improved efficiencies and, possibly, reduced expenditures, in the fixed-asset area. In several instances the combining of functions may be practical between selected properties rather than all of them. Included among the factors affecting system-wide combination feasibility is whether the property is owned and operated by that Authority or is operated by contractors, the types of fuel required and the sourcing of that fuel, and geographical location relative to one another.

Greater commonality of fleets would improve efficiencies and reduce required sourcing for parts, materials and warranty. An opportunity to achieve greater commonality of fleets is available to the transit agencies via the CaIACT/MBTA bus procurement program that nearly all are using. Training and retraining of technicians would be simplified and more efficient.

Potential cost-savings opportunities listed below are the product of conversations with each of the SANBAG region's transit agencies' staffs.

• Parts, Materials, and Contracted Services - Each property has different sourcing for parts, materials and services. The larger properties, to include Omnitrans and VVTA, have a greater number of contracts for these items with a greater volume of use. By extending these contracts to include the smaller properties, there should be a reduction in time spent sourcing the items along with a potential reduction in item costs through greater purchasing volumes. Increasing the number of contracts may be necessary to insure inclusion of all appropriate parts, materials and services needed for all of the properties, their

specific fleet mix and specific facility needs. Also, this strategy may have limited cost savings potential for properties that contract all their services and obtain the contractor's corporate-wide purchasing pricing.

Omnitrans uses PlanetBids as their on-line procurement venue. It was suggested that PlanetBids could be a shared key procurement venue for all SANBAG-area transit agencies. PlanetBids web site address is: <a href="http://home.planetbids.com/overview/">http://home.planetbids.com/overview/</a>:

Omnitrans offered the use of their written "scope" documents to the other transit agencies. Such scopes might be for particular commodities or for contracted services. Specific areas of potential opportunity include:

## Parts and materials:

- 1. Combined contract for tires. Current contracts are with Goodyear, Michelin and Bridgestone.
- 2. Combined contract for batteries.
- 3. Combined contract for unleaded gasoline and diesel fuel.
- 4. Combined contracts for bus parts. Example: Creative Bus Sales, etc.
- 5. Combined contracts for major components such as engines and transmissions. Would require multiple vendors to include Cummins, Allison, Chevrolet and Ford, etc.
- 6. Combined contract or Purchase Order agreement with auto parts chain such as Car Quest, NAPA, etc. for common auto parts.
- 7. Combined contract for lubricants.
- 8. Combined contract for purchase of bus stops, signs and shelters.
- Insure all properties purchase revenue vehicles from the CalACT (California Association for Coordinated Transportation) program and State contracts for support vehicles.

## Contracted services:

- 1. Combined contract for major component replacements and rebuilds such as engines and transmissions.
- 2. Combined contract for body repair and paint.
- 3. Combined contract for towing. May be more appropriate for multiple contracts based upon sectors.
- 4. Combined contract for facility repairs, such as HVAC, plumbing, etc.
- 5. Combined contract for safety equipment, extinguishers, etc.
- 6. Combined contract for parts cleansers and waste oil recovery.
- 7. Combined contract for hazardous waste.
- 8. Combined contract for major repairs to fuel and CNG compressor stations, fluid management systems, etc.
- 9. Combined contract for Stormwater Pollution Prevention Plans (SWPPP) and environmental spills.
- 10. Combined contract for purchase, installation, repair and maintenance of bus stop signs and shelters.

- 11. Combined contract for pest control services for vehicles, facilities, transfer stations, etc.
- 12. Combined contract for IT support services.
- In-House Maintenance Programs The vehicle and facility maintenance procedures and programs appear adequate to the needs of each property. However, there is sufficient variation that consideration should be given to standardizing them between properties. Procedures and program plans from Omnitrans and VVTA appear to be the most comprehensive and could be used as the basis of standardization.

All of the transit authorities expressed a desire to maintain better communications among themselves, and between the agencies and SANBAG. A suggestion was a monthly newsletter from SANBAG that would provide information about their activities and noteworthy information about the different authorities. It was suggested that each month's newsletter would feature an aspect of one of the authorities so as to better acquaint members with the other properties.

### Other in-house fixed-asset resource sharing ideas:

- Purchase a bucket truck to inspect, repair and replace lights, both exterior and interior. None of the properties has a bucket truck and each uses outside vendors as necessary to change lights. A single bucket truck could be purchased and scheduled to the facilities as needed. Omnitrans could be the base location for its storage and maintenance. Life-cycle cost should be lower than contracting for bucket truck services.
- Centralized Training for vehicle and facility personnel. Omnitrans has training assets, facilities and personnel to assist other properties in initial and refresher maintenance training. OEM and vendor training could include personnel from all properties at one location. Omnitrans belongs to the Southern California Regional Transit Training Consortium, along with 13 other Southern California transit agencies.
- 3. Centralized Purchasing. See notes above regarding Omnitrans use of PlanetBids.
- 4. Standardized maintenance procedures between properties.
- 5. Use current certified CNG technician resources to assist other properties for PM and repairs to stations and equipment. Omnitrans and VVTA have certified technicians that could perform preventive and repair maintenance on locations that use CNG.
- 6. Share a contingency fleet, instead of several of the properties maintaining contingency buses. Create a single location contingency fleet that can be dispatched to any of the properties in need of additional vehicles, whether because of increased service needs or increased vehicles out of service. The contingency fleet would be devoid of the graphics or branding.
- 7. Auxiliary portable CNG system (Hurricane). There is no CNG back-up should the fueling system fail at some of the locations that use CNG fuel. This portable unit would be connected to the fuel source, compress and deliver the fuel to the vehicle.

- 8. Centralized auction of equipment to be disposed.
- 9. Memorandum of Understanding for Shared Road/Emergency Service. This may only be applicable in some cases. For example MARTA operates into San Bernardino and it would be expeditious for Omnitrans to react to a downed MARTA vehicle and/or need for a transit supervisor to conduct an accident investigation or provide a replacement vehicle.
- 10. Omnitrans offered that with additional paint and body staff they could begin performing body repair work for other transit agencies.

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

# THIS PAGE INTENTIONALLY LEFT BLANK

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
Agency Overview:								
Service Area Population	2,035,200	1,470,000	335,000	40,000	53,200	40,500	4,800	1,470,000
Service Area Geographic Area (Square Miles)	20,057 (San Bernardino County)	463	424	653	136	70	31	(San Bernardino Valley)
Total Annual System Ridership, All Modes Combined	-	16,146,268	1,960,286	208,972	380,748	153,408	34,153	-
Direct or Contract Operation	-	Direct - Fixed Route, Contract - D/R and some Community Routes	Contract	Contract	Direct	Direct	Contract	-
Services Provided:								
Fixed Route		$\checkmark$	$\checkmark$	$\checkmark$		$\checkmark$		
Deviated Fixed Route			√ (Includes DAR & ADA Services)		$\sqrt[]{}$ (Includes ADA Service)		√ (Includes DAR & ADA Services)	
Bus Rapid Transit		$\checkmark$						
Passenger Rail	√ (Future RPRP, supports Metrolink Services)							
Express Bus								
Commuter Express		$\checkmark$			V	$\checkmark$		
General Public Demand Response			(County deviated routes)	$\checkmark$	$\sqrt[]{}$ (Includes ADA Service)	(Includes ADA Service)		
ADA Paratransit		$\checkmark$	$\checkmark$	$\checkmark$				
Vanpool	√ (Pursuing expansion of existing VVTA program)		$\checkmark$					
Other			(Intercity: B-V Link)			(Weekend Trolley, Off-the-Mountain)	√ (Senior/Disabled DAR and DAR Medical Transport)	√ (Travel Training, TREP)
Founding Legislation (Senate Bill, JPA, etc.)	Created as COG 1973	JPA - 1976	JPA - 1991	City Council - 1994	JPA - 1991	JPA - 1993	City Council - 1995	Measure I, 2004
Funding Sources: Operating	N/A							
FTA Section 5307	,	$\checkmark$						
FTA Section 5309			$\checkmark$					
FTA Section 5311				$\checkmark$		$\checkmark$	$\checkmark$	
FTA Section 5316 (JARC)						$\overline{\mathbf{v}}$		$\overline{\mathbf{v}}$
Other FTA:								
TDA - LTF	$\overline{\mathbf{v}}$	$\checkmark$		$\checkmark$		$\checkmark$	$\checkmark$	
TDA - STA	. ν		√				√	
Measure I	√	$\checkmark$	√	$\checkmark$		$\checkmark$	√	$\checkmark$

# Table 3-1. Agency Overview

# Chapter 3.0 – Functional Assessment of the Transit Agencies

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
Other:	√ Bond Proceeds	√ (Fares, Ad Revenue, Interest/Rental)	√ (Fare Revenue, CMAQ, AB 2766, VVPDTMS, MDPDTMS, Interest)	√ (Fare Revenue)	√ (Fare Revenue)	√ (Fare Revenue, Ad Revenue)	√ (Fare Revenue, CDBG)	√ (FTA 5317 - New Freedom)
Funding Sources: Capital								
FTA Section 5307		$\checkmark$	$\checkmark$					
FTA Section 5309								
FTA Section 5311								
FTA Section 5316 (JARC)								
FTA Section 5317 (New Freedom)			$\checkmark$					
FTA Section 5339			$\checkmark$					
Other FTA:								
TDA - LTF			$\checkmark$	ν	ν			
TDA - STA			$\checkmark$				$\checkmark$	
Measure I								
Other:	√ Bond Proceeds	√ (PTMISEA, CMAQ)	√ (PTMISEA, CMAQ, Misc.)	√ (PTMISEA, Local General Assistance)		√ (PTMISEA, CTSGP, CMAQ)	√ (Prop 1B)	
Activity/function with current coordination:								
Procurement: Buses		With other non-San Bernardino County Ops						If agency buys buses
Other:				O&M (Admin): Budget	Bus Parts - State Contr.	O&M (Admin): TREP		O&M (Admin): TREP
Transfer or Interagency Agreements (See "Current Service Provided" Table)								
Agency opinions on activities/functions for future coordination:								
Operations/Maintenance:								
Procurement - Bus Parts								
Procurement - Fuel								
Tire Contracts								
CNG Fuel Station Maintenance								
Heavy Overhaul/Repair Services								
Body Repair/Painting								
Training - Coach Operator								
Emergency/ Out-of-Area mutual aid/support								
Management & Operations/Maintenance (Admin):								
ADA Eligibility Determination/Certification					N/A			
Civil Rights Compliance (e.g., Title IV)								

# Table 3-1. Agency Overview (Continued)

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
Fare Media								
Grant Application/Submission								
Grants Administration								N/A
Marketing/Regional Marketing								
Advertising								
Project Development and Construction								
Regional Transit Telephone Information/Customer service								
Reservationists								
Regional Fare Structure								
Service Planning/Analysis								
Joint Service Contracting								
Procurements (Non-bus)								
Procurement Training								
Staff Resource Sharing								
Training - Customer Service								
Training - On-going Training /Staff Development								

### Table 3-1. Agency Overview (Continued)

Notes: AB = Assembly Bill; ADA = Americans with Disabilities Act; BAT = Barstow Area Transit; CMAQ = Congestion Mitigation and Air Quality; CNG = council of governments; CTSGP = California Transit Security Grant Program; DAR = diala-ride;

FTA = Federal Transit Administration; JARC = Job Access Reverse Commute; JPA = Joint Powers Authority; LTF = Local Transportation Fund; MARTA = Mountain Area Regional Transit Authority; MBTA = Morongo Basin Transit Authority; MDPDTMS = Mountain/Desert Subareas Project Development and Traffic Management Systems; O&M = operations and maintenance; PTMISEA = Public Transportation Modernization, Improvement, and Service Enhancement Account; RPRP = Redlands Passenger Rail Project; SANBAG = San Bernardino Associated Governments; STA = State Transit Assistance; TDA = Transportation Development Act; TREP = Transportation Reimbursement Escort Program; VVPDTMS = Victor Valley Project Development and Traffic Management Systems; VVTA = Victor Valley Transit Authority



- = Currently coordinating or supports coordination
- = May support coordination
- = Does not believe coordination on this item works for agency
- = Not discussed at site visit

### Chapter 3.0 – Functional Assessment of the Transit Agencies

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles Vtrans
Current Transit Services Provided:							
Services Provided on Weekdays (W), Saturdays (Sa), and Sundays (Su)							
Fixed Route	Agency currently does not operate any transit services	Fixed Route: W: 3:48 a.m. to 11:12 p.m. Sa: 5:13 a.m. to 10:34 p.m. Su: 5:51 a.m. to 7:49 p.m. OmniGo (308/309/310): W: 6 a.m. to 9 p.m. Sa: 7 a.m. to 8:25 p.m. Su: 7:30 a.m. to 6:40 p.m. Su: 7:30 a.m. to 6:40 p.m. Sa: 6 a.m. to 10 p.m. Sa: 6 a.m. to 6 p.m. OmniGo (325): W: 5 a.m. to 8:30 p.m. Sa: 7:20 a.m. to 6:15 p.m. Su: 8:30 a.m. to 6:15 p.m.	W: 6 a.m. to 9 p.m. Sa: 7 a.m. to 8 p.m. Su: 8 a.m. to 7 p.m.	W: 7 a.m. to 7 p.m. Sa: 9 a.m. to 5 p.m. Su: 8 a.m. to 4 p.m.	W: 6 a.m. to 10 p.m. Sa: 7:15 a.m. to 8:35 p.m. Su: 9 a.m. to 3:10 p.m.	Big Bear: W/Sa: 5:30 a.m. to 7:30 p.m. Su: 6:30 a.m. to 6:30 p.m. Rim: W: 6:15 a.m. to 7:10 p.m.	See Deviated Fixed Route
Deviated Fixed Route			Same as Fixed Route		W: 7 a.m. to 6 p.m.		W: 7 a.m. to 7 p.m., Sa: 10 a.m. to 2 p.m.
Bus Rapid Transit		W: 6 a.m. to 8:45 p.m.					
Passenger Rail	Hours to be Determined (Future Services)						
Express Bus							
Commuter Express			W: 4:15 a.m. to 8:12 p.m.		W: 7 a.m. to 6:45 p.m. (to 8:30 p.m. Fridays) Sa/Su: 10 a.m. to 7:35 p.m.	Big Bear: W: 6:30 a.m., 11 a.m., 3:30 p.m. Sa/Su: 6:30 a.m., 3:30 p.m. Rim: W: 5:30 a.m., 8:45 a.m., 2:45 p.m., 5:45 p.m. Sa: 5:30 a.m., 5:45 p.m.	
General Public Demand Response		W: 6:30 a.m. to 8:30 p.m. (Service to be Eliminated September 2014)		W: 7 a.m., 10 a.m., 1 p.m., 4 p.m. Sa: 9 a.m., 12 p.m., 3 p.m. Su: 8 a.m., 11 a.m., 2 p.m.	W: 7 a.m. to 5 p.m.	<b>Big Bear:</b> W/Sa: 6 a.m. to 7 p.m. Su: 6 a.m. to 6:30 p.m. <b>Rim:</b> W: 7 a.m. to 6 p.m. Sa: 9 a.m. to 5 p.m.	
ADA Paratransit		Same as Fixed Route	Same as Fixed Route	Same as Fixed Route			
Vanpool			Hours Vary (Vanpool Hours)				

# Table 3-2. Current Transit Services Provided

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA
Services Provided: Direct-operated or contracted, if contracted, list firm						
Fixed Route	N/A	Fixed Route: Direct-operated (Limited) Fixed Route: Contracted: First Transit, Inc.	Contracted: Transdev	Contracted: MV Transportation, Inc.	Direct-operated	Direct-operated
Deviated Fixed Route			Contracted: Transdev		Direct-operated	
Bus Rapid Transit		Direct-operated				
Passenger Rail						
Express Bus						
Commuter Express			Contracted: Transdev		Direct-operated	Direct-operated
General Public Demand Response		Direct-operated	Contracted: Transdev	Contracted: MV Transportation, Inc.	Direct-operated	Direct-operated
ADA Paratransit		Contracted: First Transit, Inc.	Contracted: Transdev	Contracted: MV Transportation, Inc.		
Vanpool			Contracts with: Enterprise Rideshare & vRide (formerly VPSI) for Vans; privately driven			
Other	SANBAG Funds and is a Member of SCRRA					Weekend Trolley: Direct-operated
Service Characteristics						
System Design Concept	Agency currently does not operate any transit services	Hub-and-spoke system with transfers at major transfer centers	Time transfer system with multiple transfer points	Hub-and-spoke system	Hub-and-spoke system (Twentynine Palms and Yucca Valley), linked by linear intercity service	Time transfer system with multiple transfer points
Peak to Base Ratio		Frequencies range from 10 minutes (sbX Green Line) to 60 minutes (fixed routes), and up to 120 minutes; however, system mostly operates on a base level of service all day	Regional fixed route service hourly, with mid- day 30-minute peak service on core routes. County Routes are 2 hour or 1.5 hour headways, with no peak service.	Fixed routes hourly, with 4 trips/day in County and City DAR	Fixed routes generally hourly on weekdays, with longer trips on weekends and evenings due to extended headways	Base level of service
Dispatching Hours		East Valley Facility: 21 hours/day West Valley Facility: 12 hours/day	To 10:30 p.m.	W: 6 a.m. to 8 p.m. Sa: 8 a.m. to 6 p.m. Su: 7 a.m. to 5 p.m.	W: 5 a.m. to 10:30 p.m. Sa: 6 a.m. to 10:30 p.m.	Service hours only

# Table 3-2. Current Transit Services Provided (Continued)

# Chapter 3.0 – Functional Assessment of the Transit Agencies

City of Needles	Vtrans
Tues - Thurs as Needed	
Contracted:	
McDonald Transit	
DAR and DAR Medical	Travel Training:
Transport by Agreement	Vtrans - provided
	IKEP: VOIUIILEEI DIIVEIS
One Deviated Fixed Route	Agency currently does not
with two loops, converging downtown approx. every	operate any transit services
30 min.	
Base level of service	
Service hours only	

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
Existing Transfer Agreements								
Agency/Type of Agreement		Foothill Transit, Riverside Transit Authority, MARTA, and Metrolink/Transfers: Omnitrans accepts purchased passes from points of connection	Omnitrans/Transfers: VVTA accepts purchased passes from points of connection	VVTA/Transfers: (BAT "City Fixed Route" to VVTA "B-V Link")	Sunline Transit Agency, Palm Springs/Transfers, route and schedule coordination, transit info, signage	Omnitrans/Transfers: (\$1 off transfers to MARTA "Off-the-Mountain")	None	
Agency/Type of Agreement		Orange County Transportation Authority/Transfers: Omnitrans accepts purchased passes from Chino Transit Center	BAT/Transfers: VVTA accepts purchased passes from points of connection			Metrolink/Transfers: (\$1 off transfers to MARTA "Off-the-Mountain")		
ADA Service:								
Service Delivery Method	No ADA-specific Service (agency currently does not operate any transit services)	ADA-specific Service: Assigned Vehicles/Drivers	ADA-specific Service: Assigned Vehicles/Drivers	ADA-specific Service: Assigned Vehicles/Drivers	Deviated Fixed Route Services DAR Services: Assigned Vehicles/Drivers	DAR Service: Assigned Vehicles/Drivers	Deviated Fixed Route/ DAR/ADA Service (combined into one route)	No ADA-specific Service (agency currently does not operate any transit services)
Considered using taxis during early/late hours?		No	Yes (no control, poor quality service, not efficient for large, spread out service area)	No	Yes (not efficient for large, spread out service area)	No (minimal or no taxi service in Mountain area)	No taxi service available in Needles	Developing Taxi-Voucher program as alternative to ADA paratransit services in Valley
ADA Passenger Certification Process		<ul> <li>Applicant completes paper application. A Healthcare Verification</li> <li>Form from his/her licensed medical provider also is required.</li> <li>Process conducted in- house</li> </ul>	<ul> <li>Applicant completes paper or electronic application. A Healthcare Verification Form from his/her licensed medical provider also is required.</li> <li>Process is contracted to ADARide</li> </ul>	<ul> <li>Applicant completes and submits application to his/her medical provider</li> <li>Process conducted in- house</li> </ul>	<ul> <li>No application required due to no ADA-specific service in the deviated fixed route mode (for fare ID purposes only)</li> <li>Process conducted in- house</li> </ul>	<ul> <li>1 of 4 criteria as proof of disability: 1) Medicare card or insurance award letter; 2) DMV disabled person placard ID card/receipt; 3) VA award letter confirming disability of 50% or greater; medical disability certification by physician</li> <li>Process conducted in- house</li> </ul>	Not required - ADA requirements fulfilled through Fixed Route Deviation Service	Agency recommends implementing in-person assessments, is willing to handle this for Omnitrans and willing to consider administering region-wide program
Reviews/audits of ADA Certification process?	N/A	Yes	Yes	Yes	N/A	No	N/A	N/A

# Table 3-2. Current Transit Services Provided (Continued)

Notes: ADA = Americans with Disabilities Act; BAT = Barstow Area Transit; DAR = dial-a-ride; MARTA = Mountain Area Regional Transit Authority; MBTA = Morongo Basin Transit Authority; SANBAG = San Bernardino Associated Governments; SCRRA = Southern California Regional Rail Authority; TREP = Transportation Reimbursement Escort Program; VVTA = Victor Valley Transit Authority

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
Service Planning:								
Service Planning Staffing:								
Number of Planning Employees	5	7	0	0	0	0	0	0
Types of Planning Duties (Short Range/Service Planning, Long Range Planning, Scheduling, etc.)	SANBAG staff assist Transit Agencies with COA/SRTP every 5-years	Short Range Planning, route design and scheduling, ridership analysis; long Range Planning w/ regional agencies.	Some Service Planning duties performed by Exec Director, Customer Service Clerk and/or Contract Compliance Officer. Long Range Planning done by consultants	Some Service Planning is done by City Trans. Manager as needed. Long Range Planning done by consultants	Some Service Planning is done by General Manager and Ops Manager. Long Range Planning done by consultants	Some Service Planning conducted by General Manager / Assist GM.	Route planning and other Service Planning functions are performed once per quarter with McDonald Transit Regional Manager.	N/A
Goals, Objectives, Standards in SRTP/COA?	NA	Yes	Yes	Yes	Yes	Yes	Yes (draft in progress)	In Strategic Plan
On-going Process for evaluating route performance?	NA	Yes. SRTP has specific standards for fixed route, ADA demand response and general demand response that are used on a monthly and yearly basis to evaluate the performance of the transit services.	Yes	Yes. Annual unmet needs hearing identifies deficiencies noted by passengers; Adjustments made to fixed routes consider information available in Transtrack reports.	Yes. Quarterly Performance Standards Report is provided to the MBTA Board. Annual Public Hearings are scheduled every fall in coordination with SANBAG	Yes. Service performance deficiencies are identified through numerous methods which are all considered in determining service deficiencies	Yes. Transit Mgr reviews TransTrack data once a quarter. SRTP under way provides more detailed evaluation criteria	N/A
Public outreach effort conducted annually on unmet needs and/or proposed service changes?	SANBAG typically conducts the unmet needs hearings for agencies, where required	Yes - As part of SRTP and/or public hearing for service changes. Changes first go to Service Planning & Monitoring Committee (SPMC). If service changes are considered minor changes, they can be made in the next schedule change (three times a year).	Yes - At annual unmet needs hearing	Yes - At annual unmet needs hearing typically conducted at VVTA	Yes - At annual unmet needs hearing. General Manager does a lot of community outreach on an on-going basis.	Yes - Annual Public Hearing in September or October	Yes - As part of SRTP process	N/A
Significant public outreach effort conducted as part of most recent COA/SRTP?		Yes - Omnitrans informed and obtained comments from riders, cities, stakeholders, neighboring transit providers and county agencies. There were ample opportunities to provide comments on the proposed SRTP, public hearings were scheduled at several locations to allow the public opportunity to provide feedback.	Yes - Stakeholder interviews, bilingual open house, customer comments, driver input, on- board surveys.	Yes - Stakeholder interviews, on-board surveys, operator interviews, outreach meetings conducted at Senior Centers and Barstow College.	Yes - Onboard surveys, driver surveys, community intercept surveys, and focus groups	Yes - Stakeholder meetings, public surveys, and focus groups. Prior to approval of the SRTP, a workshop was held at which the recommendations were discussed by board members, employees, and the public	Yes - As part of SRTP process currently under way	N/A

Table 3-3. Service Planning

# Chapter 3.0 – Functional Assessment of the Transit Agencies

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
Ridership counting system (e.g., farebox, APC's, manual counts, etc.)	NA	Ridership data is collected through GFI farebox and APCs, and is reviewed by the service planning staff. Ridership is reviewed at route and systemwide level.	Ridership data is collected through GFI farebox, which classifies revenue by date, type, route, and run, and through the APCs.	Manual counts by drivers. Driver data is randomly crossed checked with info from on-board cameras	Manual tallies on trip sheets are entered daily into Transtrack system. Boarding data at the bus stop level is periodically and separately surveyed.	On a daily basis, ridership data is entered into a performance tracking program	The bus driver collects ridership data.	
On-Time Performance measuring system (e.g., Supervisor observations, GPS/AVL, other?)	NA	Omnitrans uses GPS/AVL data to obtain on-time performance. Field supervisors also conduct regularly on-site observation of on-time performance.	GPS/AVL as well as field supervision and driver reports	Dispatcher monitors operators and trip status, making adjustments and reassignments as necessary to ensure on time performance	Field Supervisor observations are tallied by the Operations Manager in Excel	On a monthly basis data is evaluated, analyzed, and reported to the Board along with possible explanations for operating above or below expectations	Monitored by Contractor's local manager	

# Table 3-3. Service Planning (Continued)

Notes: APCs = automatic passenger counters; AVL = automatic vehicle locator; BAT = Barstow Area Transit; GPS = global positioning system; MARTA = Mountain Area Regional Transit Authority; MBTA = Morongo Basin Transit Authority; SANBAG = San Bernardino Associated Governments; VVTA = Victor Valley Transit Authority

Assessment Area:	SANBAG <sup>2</sup>	Omnitrans <sup>3</sup>	VVTA <sup>4</sup>	BAT⁴	MBTA⁵	MARTA⁵	City of Needles <sup>4</sup>	Vtrans <sup>6</sup>
Operations and Administrative Support Functions:								
Agency Management and Administrative Employees <sup>1</sup> :								
General Management	3	8	2	1	4	4	1	3
Finance /Grants	0	12	4	0	0	1	0	0
Human Resources and Safety	0	14	0	0	0	0	0	0
IT Department	0	8	1	0	0	0	0	0
Procurement Department	0	22	0	0	0	0	0	0
Operations Department	0	42	0	0	6	4.5	0	0
Maintenance Department	0	20	2	0	1	1	0	2
Planning Department	2	7	0	0	0	0	0	0
Marketing Department/Customer Service	0	23	2.5	0	0	0	0	0
Mobility Management	0	0	2	0	0	1	0	7
Total	5	156	13.5	1	11	11.5	1	12
Agency Coach Operators and Maintenance Employees:								
Coach Operators - Full Time	0	396	0	0	25	18	0	0
Coach Operators - Part Time	0	0	0	0	3	4	0	0
Maintenance Workers	0	82	0	0	2	3	0	0
Total	0	478	0	0	30	25	0	0
GRAND TOTAL AGENCY EMPLOYEES	5	634	13.5	1	41	36.5	1	12
Contractor Employees:			_					
Management and Administrative Staff	0		25	7	0	0	2	0
Operators and Maintenance Workers	0	207	155	24	0	0	4	0
Total	0	207	180	31	0	0	6	0
GRAND TOTAL AGENCY and CONTRACTOR EMPLOYEES	5	841	193.5	32	41	36.5	7	12
Agency Benefit Programs:								
Agency Administrative Employees:								
Sick Leave	Yes	96 hours per year	4 hours per pay period. Max accrue: 360 hrs		No info provided	80 hrs / year	No info provided	0.019 hr accrued for each hr worked
Vacation/Holiday Leave	Vacation and Holiday pay provided	6 months: 5 days / yr 1 – 5 yrs: 10 days /yr 5 – 10 yrs: 15 days / yr 10 – 20 yrs: 20 days / yr 20+ yrs: 25 days / yr	0-5 yrs: 80 hrs / yr 6-10 yrs: 120 hrs / yr 10+ years: 160 hrs / yr HOLIDAYS: 13 / yr		No info provided	<u>Vacation</u> : 80, 120, 160 hrs / yr (depending on length of service) <u>Holiday pay</u> : 80 hrs / yr	No info provided	Salaried staff: 0.38 hrs accrued per hr worked for first 2 yrs; after 2 yrs 0.0576 hrs/accrued per hr worked. Hourly staff: 0.19 hrs accrued per hr worked for first 2 yrs; after 2 yrs 0.038 hrs/accrued per hr worked. HOLIDAYS: 10 days/yr

 Table 3-4. Operations and Administrative Support Functions

# Chapter 3.0 – Functional Assessment of the Transit Agencies

Assessment Area:	SANBAG <sup>2</sup>	Omnitrans <sup>3</sup>	VVTA <sup>4</sup>	BAT⁴	MBTA⁵	MARTA⁵	City of Needles <sup>4</sup>	Vtrans <sup>6</sup>
Retiremer	t San Bernardino County Employees' Retirement Association (SBCERA)	CalPERS - 10.666% employer-paid contribution	CalPERS - 2.7% @55 – Classic		CalPERS - 2.0% @ 60 - Employees pay their own contribution	Lincoln Financial (no PERS) 2.0% contribution to 401A plan.	No info provided	Match up to \$1,000/yr employee contributions to 403(b)
Medical/Dental/Visio	n Medical and Dental		Paid 80/20 ER/EE				No info provided	\$500/month contributed toward medical, dental & vision coverage
Life/LT Disabilit	/		Paid 100% by ER				No info provided	Disability coverage provided for Salaried staff only
Agency Operating/Maintenance Employees:								
Sick Leav	e	96 hrs / yr			12 days / yr	40 hrs / yr		
Vacation/Holiday Leav	•	6 months: 5 days / yr 1 – 5 yrs: 10 days /yr 5 – 10 yrs: 15 days / yr 10 – 20 yrs: 20 days / yr 20+ yrs: 25 days / yr	N/A	N/A	1 – 3 yrs: 10 days /yr 4 – 5 yrs: 12 days / yr 6 – 10 yrs: 15 days / yr 10+ yrs: 20 days / yr 10 holidays / yr	80, 120 hrs / yr (depending on length of service)	N/A	N/A
Retiremer	t	CalPERS - 10.666% employer-paid contribution			8.3% of Wages	\$0.25 / hr worked contributed to Union Pension Plan		

# Table 3-4. Operations and Administrative Support Functions (Continued)

Notes:

<sup>1</sup> See detailed position tables for each agency in Section 2.0 Employees are grouped by general function to facilitate ease of comparison and do not necessarily reflect agency-specific department names.

<sup>2</sup> For SANBAG, includes only staff in Transit and Rail Group. SANBAG does not operate any transit services.

<sup>3</sup>Omnitrans contracts for ADA Paratransit and limited fixed route service. Omnitrans did not provide a breakdown of management vs. operators/maintenance workers in the contractor total

<sup>4</sup>Contracts for all operations and maintenance of its services.

<sup>5</sup>Directly operated and does not use contractor operator or maintenance employees.

<sup>6</sup> Vtrans does not directly operate any transit services but is preparing to provide vehicle maintenance services to partnering social service agencies.

APCs = automatic passenger counters; AVL = automatic vehicle locator; BAT = Barstow Area Transit; GPS = global positioning system; MARTA = Mountain Area Regional Transit Authority; MBTA = Morongo Basin Transit Authority; SANBAG = San Bernardino Associated Governments; VVTA = Victor Valley Transit Authority

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
MIS/IT:								
Information Systems Master Plan or IT decision making process		yes	no	no	no	no	no	
Computer network systems with servers	yes	yes	yes	no	no	yes	no	
IT staff: agency or contracted out	yes, 1	yes, 7	yes, 1	no	no /contracted	no /contracted	N/A	
Enterprise-level software system	no	SAP	no	no	no	no	no	
Systems by Department:								
Operations	TransTrack	Trapeze, TransTrack	TransTrack, MyAvail, Trapeze Pass	TransTrack	TransTrack plus module for dial-a-ride (2)	TransTrack	TransTrack	
Vehicle Maintenance		SAP, Trapeze, Access and others	RTA	FleetFocus	Fleet Controller; Zonar – Vehicle Inspection Reporting	Management Plus	Maintenance. Subcontracted by Ops. Contractor	ManagerPlus (coming on-line in 2014)
Facility Maintenance		SAP-MM/PM, TAC Building Automation	RTA	no	no	MS Access (3)	no	
Finance and Accounting		SAP, BSI-TaxFactory	Denali	excel for budgeting accounting	Quickbooks; Paychex; Excel (1)	Quickbooks (2)	City function	
Service Planning and Scheduling		Trapeze-FX	Trapeze	no	no	MS Excel for Dial-a-ride	no	
Customer Service/Information		Trapeze – COM module, Shoretel					n/a	
Trip Planning/Website Development		Industrial Strength, LA Metro	Google Transit	no	no	yes	no	

# Table 3-5. Management Information Systems/Information Technology

# Chapter 3.0 – Functional Assessment of the Transit Agencies

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
Specific Systems:								
Fare collection system	N/A	GFI Odyssey	GFI Odyssey	7 GFI Cents-a-Bill and basic drop boxes	Basic drop box	Basic drop box	Basic drop box	N/A
Bus radio voice and/or data communications systems		Vision Comm.	2-way radios	Cazcom	Motorola 2-way radios	2-way radios	2-way radios	
Bus GPS/AVL/CADD Dispatch		Trapeze	MyAvail	no	no	yes	no	
Mobile Data Terminals (MDT)		Trapeze	DDS	no	no	no	no	
"Next Trip" or similar system for bus arrival times (on vehicles or at stops)		NextTrip	MyAvail	no	no	no	no	
Traffic Signal Priority Systems		Trapeze	no	no	no		no	
Integration with Google Transit for public information		yes, Developed by IT	yes	no	no	yes	no	
Automatic Passenger Counters		Yes, on a portion of fleet	yes, all fixed route buses	no	no	no	no	
Video Surveillance for security		yes	yes, buses	not mentioned	yes, buses, transit centers, and transit facilities	yes, buses	not mentioned	
Data Exchange/Coordination systems with other agencies or information centers		no	no	no	no	no	no	

# Table 3-5. Management Information Systems/Information Technology (Continued)

Notes:

Software	Application
Quickbooks	accounting, and tracking fixed assets; (2) also for payroll
Paychex	payroll
Fleet Controller	tracking and scheduling Vehicle Maintenance, and Parts Inventory.
Zonar	Vehicle Inspection Reporting system
FleetFocus	record and track vehicle maintenance tasks, work orders, inventory, productivity etc
TransTrack	tracking performance data and data reporting to SANBAG
TransTrack module	2) module of Transtrack has been adapted for the dial-a-ride services. Dispatch uses this to provide rider manifests and customer database
GFI	Fare Collection system, fareboxes
Excel	1) recording of fixed assets and for NTD data reporting
Management Plus	Tracks vehicle performance measures, equipment and maintenance history, Fleet Maintenance/Service tracking, consumable parts inventory
MS Access	3) asset tracking
MyAvail by Avail Technologies	AVL technology, next bus information,
Trapeze Pass by Trapeze	scheduling and dispatch of ADA
RTA	vehicle and facilities maintenance
SAP	enterprise management software
Shoretel	Call center phone system
BSI-TaxFactory	Payroll Tax software
TAC Building Automation	HVAC and Lighting Control
Denali by Cougar Mountain	Accounting System
INFO POINT	real time bus location information via website

BAT = Barstow Area Transit; MARTA = Mountain Area Regional Transit Authority; MBTA = Morongo Basin Transit Authority; SANBAG = San Bernardino Associated Governments; VVTA = Victor Valley Transit Authority

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA	City of Needles	Vtrans
Fixed Asset Review:								
Fleet:								
Fleet Composition:	N/A							N/A
Total Artic Fleet		14						
Total 40' Fleet		161	38					
Total 35' Heavy Duty			5		4			
Total 30' Heavy Duty		10						
Total 32'-35' Heavy Duty			16					
Total 25' - 32' Cutaways or Medium Duty			8	10	8	12	3	
Total less than 25' Cutaways or Medium								
Duty		131 (DAR)	29	10	12	8	3	
Vanpools			147					
Total Revenue Fleet		316	243	20	24	20	6	
Other Support Vehicles:		73	22	1	4	5		
Fuel Types Used: Revenue Fleet								
CNG - % of Fleet		100%	68%	35%	100%			
Diesel - % of Fleet						39%		
Gasoline - % of Fleet			32%	65%		61%	100%	
Fuel Types Used: Non-Revenue Fleet								
CNG - % of Fleet			32%		50%			
Diesel - % of Fleet		1%						
Gasoline - % of Fleet		94%	68%	100%	50%	100%		
Other		5%						
Fleet Maintenance Services:								
Directly - provided or contracted out?		Both	Contracted	Contracted	Direct	Direct	Contracted	
Subcontracted Maintenance services?		Yes	Yes	Yes	Yes	Yes	Yes	
Number of Maintenance Facilities		3	1	1	1	2	1	
Major subcontractors used:	-	First Transit - ADA and limited fixed route service only	Transdev	MV Transportation	-	-	McDonald Transit and local garage for vehicle maintenance	-
Fleet Maintenance Plan?		Yes	Yes	Yes	Yes	Yes	Contractor's	
Process for prioritizing capital replacements		FTA	FTA	FTA	FTA	FTA	Milege/Age of Vehicle	

# Table 3-6. Fixed Asset Review

# Chapter 3.0 – Functional Assessment of the Transit Agencies

Assessment Area:	SANBAG	Omnitrans	VVTA	BAT	MBTA	MARTA
Joint Procurements conducted for:						
Buses		Other Transits/ CalAct	CalACT	CalACT	CalACT	CalACT
Fuel		No	No	City	No	County
Maintenance Equipment		No	No	No	No	No
Parts Inventory		No	No	No	State DGS	No
Inventory Management System?		Yes - SAP System	Yes - Ron Turley Associates	Yes	Yes - Fleet Controller	Yes - Maintenance Manager Plus
FACILITIES:						
Number of facilities:	1	4	1	1	2	2
Facility Maintenance Plan?		Yes	Yes	Yes	Yes	Yes
Major Subcontracted Facility Maintenance Services:						
Landscaping		No	Yes	Yes	Yes	Yes
Custodial services		No	Yes	No	No	Yes
Bus Stop/Shelter cleaning		In-house with contractor as needed	City	No/City	In-house	Contract
Other:		Heating, ventilation, and air conditioning (HVAC)				
How is bus stop/shelter installation and maintenance handled?		In-house with contractor as needed	Contract	City	Bid for installation, Maintenance In-house	Contract
Other Property requiring maintenance?					N/A	
Other Facility Maintenance needs?				Landscaping - Contract		

# Table 3-6. Fixed Asset Review (Continued)

Notes: ADA = Americans with Disabilities Act; BAT = Barstow Area Transit; CNG = compressed natural gas; DAR = dial-a-ride; FTA = Federal Transit Administration; MARTA = Mountain Area Regional Transit Authority; MBTA = Morongo Basin Transit Authority; SANBAG = San Bernardino Associated Governments; VVTA = Victor Valley Transit Authority

City of Needles	Vtrans
CalACT	
County	
No	
No	
No	Manager Plus for Maintenance
1	1
No	
Subcontractor	
Subcontractor	
Public Works Dept. Personnel	
Vehicle Maintenance	
Public Works Dept. Personnel	
N/A	
El Garces Facility – Fall 2014	

# 4.0 PERFORMANCE REVIEW OF THE TRANSIT AGENCIES

The purpose of the San Bernardino Associated Governments (SANBAG) County-wide Transit Efficiency Study is to conduct a study of the six transit operators and the Consolidated Transportation Services Agency in San Bernardino County in order to identify potential cost efficiencies that can be achieved through coordination and joint efforts among the transit agencies and SANBAG. A supporting goal is to improve transit services for current and new transit users through better coordination among the operators and SANBAG. As with previous portions of this study, the transit operators under review, and their abbreviations used in the text, are as follows:

- Barstow Area Transit (BAT)
- Morongo Basin Transit Authority (MBTA)
- Mountain Area Regional Transit Authority (MARTA)
- City of Needles
- Omnitrans
- Victor Valley Transit Authority (VVTA)

Omnitrans and VVTA are classified as urbanized area transit operators, while the others are classified as rural operators, for purposes of certain funding such as Transportation Development Act (TDA) Local Transportation Fund eligibility and classification in the National Transit Database.

As part of the overall study, Task 1.3 of the study's Scope of Work calls for the consultant team to conduct a high-level performance review of each transit agency against their adopted goals, objectives, and service standards, and compared with peer agency performance. The intent of the performance review is to identify areas where the agencies are doing well, as well as areas with opportunity for improvement through internal efficiency improvements, joint coordination, or other measures.

In order to conduct the performance review, a three-part process was employed, recognizing that existing goals, objectives, and standards, as well as available data, vary amongst the agencies. The process, detailed in this chapter, was as follows:

- <u>Standardized Performance Review on Key Indicators</u> Each of the agencies was evaluated using a set of standardized performance indicators and their fiscal year (FY) 2013 TransTrack data submittals. This provided a uniform set of performance indicators for each mode operated.
- Internal Agency Performance Review All six transit agencies have either a shortrange transit plan (SRTP) or a comprehensive operational analysis (COA) that identifies goals, objectives, and standards (the City of Needles' is in draft form). Since each SRTP or COA was developed in a different format, at a different point in time, and with differing approaches and philosophies for goal and objective setting, a customized approach was used to evaluate each agency using the key service standard indicators from their most recent SRTP or COA. This approach was used

to develop an overall picture of how well the agency is achieving its service objectives.

 <u>Peer Agency Performance Review</u> – In order to conduct a peer agency performance review, peers were identified using National Transit Database (NTD) information for the most recent year available (FY 2012). As discussed later in this chapter, the NTD data had limitations affecting the extent to which peer agency indicators could be obtained; however, the results were still useful in placing each agency's performance in the context of its peers.

# 4.1 Standardized Performance Review on Key Indicators

Each of the transit agencies in San Bernardino County submits on-going operational and financial data into the TransTrack transit reporting system (<u>http://transtrack.net/</u>). The data in this system is based on actual reported results and is separated by year and mode, yielding valuable information for purposes of evaluating performance. FY 2013 TransTrack data was selected as the base statistics source for this evaluation because it was the most recent year for which a full-year's data was available at the time of this study.

For each agency, FY 2013 base statistical information was obtained for the following:

- Total Passenger Boardings
- Total Operating Costs
- Fare Revenues
- Revenue Miles
- Revenue Hours
- Peak Vehicles<sup>3</sup>

These base statistics were then used to develop a standardized set of Performance Indicators for each agency, grouped by category as follows:

<u>Cost and Financial Efficiency</u> – These indicators evaluate cost per unit of service supplied and include:

- Operating Cost per Revenue Mile
- Operating Cost per Revenue Hour
- Annual Operating Cost per Peak Vehicle

<sup>&</sup>lt;sup>3</sup> Peak vehicle information (also known as "Vehicles Operated in Maximum Service") was only available in TransTrack for Omnitrans and Victor Valley Transit Authority (VVTA). For the other operators, agencies were contacted to obtain peak vehicle information.

<u>Service Effectiveness</u> – These indicators evaluate service utilization per unit of service supplied and include:

- Passenger Trips per Revenue Mile
- Passenger Trips per Revenue Hour
- Annual Passengers per Peak Vehicle

Cost Effectiveness – These indicators evaluate financial efficiency and include:

- Operating Cost per Passenger Trip
- Farebox Recovery Ratio

A summary of FY2013 performance indicators for each of the six transit operators is shown below for fixed route service in Table 4-1 and for demand response service in Table 4-2. It should be noted that a realistic comparison between the operators in a single table such as this is infeasible due to substantial differences in service area characteristics, including service area size, geographic features, and service area demographics. For this reason, a quantitative comparison of each operator's performance to peer operators with similar characteristics is included in Section 4.3.

	Fixed Route								
FY 2013 Statistics <sup>1</sup>	BAT	MBTA	MARTA	Needles	Omnitrans	VVTA			
Total Passenger Boardings	188,579	357,450	137,801	34,153	15,509,733	1,765,471			
Total Operating Costs	\$1,505,698	\$1,796,920	\$1,653,577	\$243,973	\$54,906,414	\$7,117,659			
Fare Revenues	\$153,218	\$352,159	\$272,261	\$35,151	\$13,031,443	\$1,701,781			
Revenue Miles	418,485	563,127	433,869	46,054	7,491,400	1,831,414			
Revenue Hours	21,296	25,872	20,768	3,256	588,157	105,946			
Peak Vehicles <sup>2</sup>	8	9	7	1	136	29			
Performance Indicators									
Cost and Financial Efficien	су								
Operating Cost per Revenue Mile	\$3.60	\$3.19	\$3.81	\$5.30	\$7.33	\$3.89			
Operating Cost per	¢70.70	¢60.45	¢70.62	¢74.02	¢02.25	¢c7.40			
Appual Operating Cast per	\$70.70	\$69.45	\$79.62	\$74.93	\$93.35	\$07.18			
Peak Vehicle	\$188.212	\$199.658	\$236.225	\$243.973	\$403.724	\$245.437			
Service Effectiveness	+ /	+ /	+ / -	+ -)	+ /	÷ - , -			
Passenger Trips per Revenue Mile	0.45	0.63	0.32	0.74	2.07	0.96			
Passenger Trips per Revenue Hour	8.86	13.82	6.64	10.49	26.37	16.66			
Annual Passengers per									
Peak Vehicle	23,572	39,717	19,686	34,153	114,042	60,878			
Cost Effectiveness			r	n	r	r			
Operating Cost per Passenger Trip	\$7.98	\$5.03	\$12.00	\$7.14	\$3.54	\$4.03			
Farebox Recovery Ratio	10.2%	19.6%	16.5%	14.4%	23.7%	23.9%			

#### Table 4-1. Transit Operator Fixed Route Service Performance: Actual (2013)

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

	Demand Response						
				City of			
FY 2013 Statistics <sup>1</sup>	BAT	MBTA	MARTA	Needles	Omnitrans	VVTA	
Total Passenger Boardings	21,483	23,298	15,607	4,579	491,179	126,144	
Total Operating Costs	\$731,197	\$532,770	\$644,549	\$24,453	\$12,569,094	\$3,599,529	
Fare Revenues	\$36,450	\$31,041	\$45,484	\$3,572	\$1,584,790	\$416,524	
Revenue Miles	260,256	103,536	107,057	12,067	3,005,252	751,442	
Revenue Hours	13,398	7,317	7,499	1,182	182,214	44,840	
Peak Vehicles <sup>2</sup>	7	5	4	2	96	27	
Performance Indicators							
Cost and Financial Efficien	су						
Operating Cost per							
Revenue Mile	\$2.81	\$5.15	\$6.02	\$2.03	\$4.18	\$4.79	
Operating Cost per							
Revenue Hour	\$54.58	\$72.81	\$85.95	\$20.69	\$68.98	\$80.28	
Annual Operating Cost per							
Peak Vehicle	\$104,457	\$106,554	\$161,137	\$12,227	\$130,928	\$133,316	
Service Effectiveness							
Passenger Trips per							
Revenue Mile	0.08	0.23	0.15	0.38	0.16	0.17	
Passenger Trips per							
Revenue Hour	1.60	3.18	2.08	3.87	2.70	2.81	
Annual Passengers per							
Peak Vehicle	3,069	4,660	3,902	2,290	5,116	4,672	
Cost Effectiveness							
Operating Cost per							
Passenger Trip	\$34.04	\$22.87	\$41.30	\$5.34	\$25.59	\$28.54	
Farebox Recovery Ratio	5.0%	5.8%	7.1%	14.6%	12.6%	11.6%	

## Table 4-2. Transit Operator Demand Response Service Performance: Actual (2013)

1. Based on Transit Operator's TransTrack data

2. Peak vehicle data for BAT, MBTA and the City of Needles obtained directly from individual operator in July 2014

3. Fixed-route statistics for Omnitrans include directly-operated service only; fixed-route statistics for VVTA include regular fixed-route only. See separate transit operator sections for details on other modes.

### 4.1.1 Barstow Area Transit

BAT actual (2013) performance indicators are provided in Table 4-3 and are discussed below.

For the fixed route service, operating cost per revenue hour was \$70.70 and operating cost per revenue mile was \$3.60. For demand response service, operating cost per revenue hour was \$54.58 and operating cost per revenue mile was \$2.81. These cost efficiency values indicate a relatively low-cost operation amongst the six transit agencies.

For the fixed route service, there were 8.86 passenger trips per revenue hour and 0.45 passenger trips per revenue mile. For demand response service, there were 1.60 passenger trips per revenue hour and 0.08 passenger trips per revenue mile. These
service effectiveness values indicate relatively low service utilization amongst the six transit agencies.

Operating cost per passenger trip was \$7.98 for fixed route service and \$34.04 for demand response service. These cost-per hour values are high relative to the other county transit agencies being reviewed. The farebox recovery ratio was 8.5 percent for the combined system, which is the lowest of the six transit agencies and does not meet Transportation Development Act minimum requirements<sup>4</sup>. A consolidation of BAT services with VVTA services is currently underway and will ultimately address the farebox recovery ratio issue.

	Fixed Route -	Demand Response -	Combined
FY 2013 Statistics <sup>1</sup>	Purchased	Purchased	System
Total Passenger Boardings	188,579	21,483	210,062
Total Operating Costs	\$1,505,698	\$731,197	\$2,236,895
Fare Revenues	\$153,218	\$36,450	\$189,668
Revenue Miles	418,485	260,256	678,741
Revenue Hours	21,296	13,398	34,694
Peak Vehicles	8	7	15
Performance Indicators			
Cost and Financial Efficiency			
Operating Cost per Revenue Mile	\$3.60	\$2.81	\$3.30
Operating Cost per Revenue Hour	\$70.70	\$54.58	\$64.47
Annual Operating Cost per Peak Vehicle	\$188,212	\$104,457	\$149,126
Service Effectiveness			
Passenger Trips per Revenue Mile	0.45	0.08	0.31
Passenger Trips per Revenue Hour	8.86	1.60	6.05
Annual Passengers per Peak Vehicle	23,572	3,069	14,004
Cost Effectiveness			
Operating Cost per Passenger Trip	\$7.98	\$34.04	\$10.65
Farebox Recovery Ratio	10.2%	5.0%	8.5%

#### Table 4-3. BAT Performance: Actual (2013)

1. Based on TransTrack data

<sup>&</sup>lt;sup>4</sup> BAT is categorized as a "Non-Urbanized Area Operator" under section 99268.4 of the TDA statutes and codes (Caltrans, 2013). Under that regulation, BAT must maintain a 10.0 percent farebox recovery ratio in order to be eligible to receive TDA funds (Local Transportation Funds, or "LTF", and State Transit Assistance Funds, or "STA"). The consolidation of BAT with VVTA which began in 2014 will address minimum farebox recovery requirements.

BAT provides service to low-density high desert communities and the performance indicators tend to reflect the nature of this service area. A re-evaluation of the route segment productivity of each route, and of areas served by the demand-response service should be undertaken to try to increase service utilization and farebox recovery ratio. Demand-response operating and scheduling practices, such as how mid-day lulls in demand are handled, should also be reviewed.

### 4.1.2 Morongo Basin Transit Authority

MBTA actual (2013) performance is provided in Table 4-4 and is discussed below.

For the fixed route service, operating cost per revenue hour was \$69.45 and operating cost per revenue mile was \$3.19. For demand response service, operating cost per revenue hour was \$72.81 and operating cost per revenue mile was \$5.15. These costs are in the low- to medium- range of the six transit agencies, with the fixed route operating cost per revenue mile (\$3.19) being the lowest of all the transit agencies.

For the fixed route service, there were 13.82 passenger trips per revenue hour and 0.63 passenger trips per revenue mile. For demand response service, there were 3.18 passenger trips per revenue hour and 0.23 passenger trips per revenue mile. These values are in the medium to high range of the six transit agencies and indicate relatively good service utilization given the nature of the service area.

Operating cost per passenger trip was \$5.03 for fixed route service and \$22.87 for demand response service. These values were in the low to medium range of the six transit agencies, with the demand response operating cost per passenger trip (\$22.87) being the lowest of all the transit agencies (excluding the City of Needles, which has a volunteer demand response agreement with the local senior citizen's club). The farebox recovery ratio was 16.4 percent for the combined system, which is the third highest behind Omnitrans and VVTA, both of which are classified as urbanized area operators, while MBTA is classified as a rural operator.

MBTA provides service to low-density desert communities, but performs relatively well given the nature of its rural service area.

FY 2013 Statistics <sup>1</sup>	Fixed Route	Demand Response	Combined System								
Total Passenger Boardings	357,450	23,298	380,748								
Total Operating Costs	\$1,796,920	\$532,770	\$2,329,690								
Fare Revenues	\$352,159	\$31,041	\$383,200								
Revenue Miles	563,127	103,536	666,663								
Revenue Hours	25,872	7,317	33,189								
Peak Vehicles <sup>2</sup>	9	5	14								
Performance Indicators											
Cost and Financial Efficiency											
Operating Cost per Revenue Mile	\$3.19	\$5.15	\$3.49								
Operating Cost per Revenue Hour	\$69.45	\$72.81	\$70.19								
Annual Operating Cost per Peak Vehicle	\$199,658	\$106,554	\$166,406								
Service Effectiveness											
Passenger Trips per Revenue Mile	0.63	0.23	0.57								
Passenger Trips per Revenue Hour	13.82	3.18	11.47								
Annual Passengers per Peak Vehicle	39,717	4,660	27,196								
Cost Effectiveness											
Operating Cost per Passenger Trip	\$5.03	\$22.87	\$6.12								
Farebox Recovery Ratio	19.6%	5.8%	16.4%								

Table 4-4. MBTA Performance: Actual (2013)

1. Based on TransTrack data

2. Peak vehicles based on follow-up with MBTA on 7/16/14

### 4.1.3 Mountain Area Regional Transit Authority

MARTA actual (2013) performance is provided in Table 4-5 and is discussed below.

For fixed route service, operating cost per revenue hour was \$79.62 and operating cost per revenue mile was \$3.81. For demand response service, operating cost per revenue hour was \$85.95 and operating cost per revenue mile was \$6.02. These values are relatively high compared to the other transit agencies, with the demand response unit costs (\$85.95 and \$6.02) being the highest amongst the transit agencies.

For fixed route service, there were 6.64 passenger trips per revenue hour and 0.32 passenger trips per revenue mile. For demand response service, there were 2.08 passenger trips per revenue hour and 0.15 passenger trips per revenue mile. Compared to the other transit agencies under review, these values are low, with the overall fixed route passenger trips per revenue hour (6.64) being the lowest of all the transit agencies.

Operating cost per passenger trip was \$12.00 for fixed route service and \$41.30 for demand response service. These values are the highest of all the transit agencies. The farebox recovery ratio was 13.8 percent for the combined system, which is the second lowest of the six transit agencies.

MARTA provides service to low-density and dispersed mountain communities, where performance is limited by various uncontrollable factors, such as weather (i.e., snow), unanticipated road closures, roadway constraints (design/speed, limited road network), tourism, seasonal demand fluctuations, and appropriate fuel type for the elevation (all-diesel/gasoline). These factors, and MARTA's relative isolation from other, more urbanized areas of San Bernardino County, increase the costs of labor and materials and reduce the supply options available. MARTA may want to consider evaluating fixed-route service utilization by route segment to ensure the service is maximizing productive areas of service utilization.

1		Demand	Combined		
FY 2013 Statistics	Fixed Route	Response	System		
Total Passenger Boardings	137,801	15,607	153,408		
Total Operating Costs	\$1,653,577	\$644,549	\$2,298,126		
Fare Revenues	\$272,261	\$45,484	\$317,745		
Revenue Miles	433,869	107,057	540,926		
Revenue Hours	20,768	7,499	28,267		
Peak Vehicles <sup>2</sup>	7	4	11		
Performance Indicators					
Cost and Financial Efficiency					
Operating Cost per Revenue Mile	\$3.81	\$6.02	\$4.25		
Operating Cost per Revenue Hour	\$79.62	\$85.95	\$81.30		
Annual Operating Cost per Peak Vehicle	\$236,225	\$161,137	\$208,921		
Service Effectiveness					
Passenger Trips per Revenue Mile	0.32	0.15	0.28		
Passenger Trips per Revenue Hour	6.64	2.08	5.43		
Annual Passengers per Peak Vehicle	19,686	3,902	13,946		
Cost Effectiveness					
Operating Cost per Passenger Trip	\$12.00	\$41.30	\$14.98		
Farebox Recovery Ratio	16.5%	7.1%	13.8%		

Table 4-5. MARTA Performance: Actual (2013)

1. Based on TransTrack data

2. Peak vehicles based on follow-up with MARTA on 7/17/14

#### 4.1.4 City of Needles

The City of Needles actual (2013) performance is provided in Table 4-6 and is discussed below.

For the fixed route service, operating cost per revenue hour was \$74.93 and operating cost per revenue mile was \$5.30, placing the City of Needles in the middle range of the six agencies for fixed-route service. For demand response service, operating cost per revenue hour was \$20.69 and operating cost per revenue mile was \$2.03, which are low cost values amongst the six transit agencies.

For the fixed route service, there were 10.49 passenger trips per revenue hour and 0.74 passenger trips per revenue mile. For demand response service, there were 3.87 passenger trips per revenue hour and 0.38 passenger trips per revenue mile. These values are in the middle performance range of the six transit agencies.

Operating cost per passenger trip was \$7.14 for the fixed route service and \$5.34 for the demand response service. These values are in the middle range of the six transit agencies for fixed-route service and the lowest in cost for demand response services, much in part due to the volunteer arrangement with the Senior Citizens Club for demand response service. The farebox recovery ratio was 14.4 percent for the combined system. While the farebox recovery ratio is below the median value of the six transit agencies, it is above the TDA minimum requirement of 10.0 percent<sup>5</sup>.

FY 2013 Statistics <sup>1</sup>	Fixed Route - Purchased	Demand Response - Purchased	Combined System	
Total Passenger Boardings	34,153	4,579	38,732	
Total Operating Costs	\$243,973	\$24,453	\$268,426	
Fare Revenues	\$35,151	\$3,572	\$38,723	
Revenue Miles	46,054	12,067	58,121	
Revenue Hours	3,256	1,182	4,438	
Peak Vehicles <sup>2</sup>	1	2	3	
Performance Indicators				
Cost and Financial Efficiency				
Operating Cost per Revenue Mile	\$5.30	\$2.03	\$4.62	
Operating Cost per Revenue Hour	\$74.93	\$20.69	\$60.48	
Annual Operating Cost per Peak Vehicle	\$243,973	\$12,227	\$89,475	
Service Effectiveness				
Passenger Trips per Revenue Mile	0.74	0.38	0.67	
Passenger Trips per Revenue Hour	10.49	3.87	8.73	
Annual Passengers per Peak Vehicle	34,153	2,290	12,911	
Cost Effectiveness				
Operating Cost per Passenger Trip	\$7.14	\$5.34	\$6.93	
Farebox Recovery Ratio	14.4%	14.6%	14.4%	

Table 4-6. City of Needles Performance: Actual (2013)

1. Based on TransTrack data

2. Peak vehicles provided by the City of Needles on 7/8/14

<sup>&</sup>lt;sup>5</sup> The City of Needles is categorized as a "Non-Urbanized Area Operator" under section 99268.4 of the TDA statutes and codes (Caltrans, 2013). Under that regulation, the City of Needles must maintain a 10.0 percent farebox recovery ratio in order to be eligible to receive TDA funds (LTF and STA).

# 4.1.5 Omnitrans

Omnitrans actual (2013) performance is provided in Table 4-7 and is discussed below.

Omnitrans' directly-operated fixed route operating cost per revenue hour, at \$93.35, was by far the highest among the six transit agencies, which may be attributed in part to exclusive use of full-size and articulated buses and lower-speed operation in an urbanized environment; however, their purchased fixed route service, at \$67.55, was nearly the lowest. Omnitrans demand response operating cost per revenue hour (\$68.98) was the second lowest among all of the agencies (excluding the City of Needles, which has a special service provision agreement with the local senior citizen's club.)

	Fixed Route - Direct	Fixed-Route -	Demand Response -	Combined
FY 2013 Statistics <sup>1</sup>	Operated	Purchased	Purchased	System
Total Passenger Boardings	15,509,733	145,366	491,179	16,146,278
Total Operating Costs	\$54,906,414	\$1,871,251	\$12,569,094	\$69,346,759
Fare Revenues	\$13,031,443	\$121,661	\$1,584,790	\$14,737,894
Revenue Miles	7,491,400	369,656	3,005,252	10,866,307
Revenue Hours	588,157	27,703	182,214	798,074
Peak Vehicles	136	8	96	240
Performance Indicators				
Cost and Financial Efficiency				
Operating Cost per Revenue Mile	\$7.33	\$5.06	\$4.18	\$6.38
Operating Cost per Revenue Hour	\$93.35	\$67.55	\$68.98	\$86.89
Annual Operating Cost per Peak Vehicle	\$403,724	\$233,906	\$130,928	\$288,945
Service Effectiveness				
Passenger Trips per Revenue Mile	2.07	0.39	0.16	1.49
Passenger Trips per Revenue Hour	26.37	5.25	2.70	20.23
Annual Passengers per Peak Vehicle	114,042	18,171	5,116	67,276
Cost Effectiveness				
Operating Cost per Passenger Trip	\$3.54	\$12.87	\$25.59	\$4.29
Farebox Recovery Ratio	23.7%	6.5%	12.6%	21.3%

# Table 4-7. Omnitrans Performance: Actual (2013)

1. Based on TransTrack data

Omnitrans' fixed route service effectiveness indicator of 26.37 passengers per revenue hour is the highest of the six transit agencies, while the demand response effectiveness indicator of 2.70 passengers per revenue hour is in the middle range.

Omnitrans' fixed route cost per passenger trip of \$3.54 is the lowest of the six transit agencies as would be expected given the more urbanized service area. The demand response cost per trip of \$25.59 is the second lowest of the six transit agencies (again excluding the City of Needles with its special senior citizen's club agreement). The farebox recovery ratio was 21.3 percent for the combined system, which is the second highest of the six operators.

Overall, the directly-operated fixed-route findings likely reflect Omnitrans' urbanized operating environment, which generates higher passenger loads due to density but also slower speeds due to greater traffic congestion and boarding activity. It also reflects Omnitrans' cost of operating full-size transit coaches versus the mixed full-size and/or smaller cutaway fleets at the other agencies.

It should be noted that the service effectiveness performance indicators for the fixedroute <u>purchased</u> services indicate a far lower performance level than the <u>directly-</u> <u>operated</u> service. The purchased fixed-route service is the *OmniGo* service, which is a local fixed-route community circulator service offered on five routes (i.e., one route in Chino Hills, one route in Grand Terrace, and three intertwined routes in Yucaipa).

The *OmniGo* fixed-route service was developed to replace the *OmniLink* demandresponse service, which was eliminated in September 2014; as such, both services covered similar service areas in 2013. The *OmniGo* service, at 5.25 passengers per hour, is among the lowest-performing fixed-route services in passengers per revenue hour of any of the fixed-route services in San Bernardino County, including rural services. However, the *OmniGo* service was developed (e.g., separate mode and contract operation) to account for anticipated lower performance in this lower-demand area where some service was needed. Once the *OmniLink* service is eliminated, it is recommended that Omnitrans closely monitor the *OmniGo* service for improved productivity, and consider further route segment analysis and possible service revision, if needed.

### 4.1.6 Victor Valley Transit Authority

VVTA actual (2013) performance is provided in Table 4-8 and is discussed below.

For fixed route service, operating cost per revenue hour was \$67.18, which is the lowest of all the agencies. For commuter bus (buses to the National Training Center, Fort Irwin, from Barstow and Victorville) and demand response services, total operating costs per revenue hour were higher than VVTA's fixed route service (\$88.03 and \$80.28, respectively). All three services are currently operated by the same contractor (Transdev, formerly Veolia Transportation, Inc.). VVTA staff advised that VVTA's services have only two contractor hourly rates: demand response and motor bus. A third rate for BAT service, which is being consolidated with VVTA, took effect September 2, 2014. Thus, factors other than the contractor's hourly rates must explain the total cost per hour variations between fixed-route and demand response services. Given these variations, further examination of the contributing cost factors may be warranted.

For fixed route service, there were 16.66 passenger trips per revenue hour and 0.96 passenger trips per revenue mile, the second highest among the six agencies in terms of service productivity. For commuter bus and demand response services, passenger trips per hour were lower (10.77 and 2.81 passenger trips per revenue hour and 0.26 and 0.17 passenger trips per revenue mile, respectively). For the commuter bus service, this lower result is reflective of the nature of a long-distance service with relatively little passenger turnover.

Operating costs per passenger trip were \$4.03 for the fixed route service, \$8.17 for commuter bus service, and \$28.54 for demand response service. The farebox recovery ratio was 21.4 percent for the combined system, which is the highest of all the transit agencies, with Omnitrans following closely (21.3 percent). Both Omnitrans and VVTA are classified as urbanized area operators.

FY 2013 Statistics <sup>1</sup>	Fixed Route - Purchased	Demand Response - Purchased	Commuter Bus - Purchased	Vanpool - Purchased <sup>2</sup>	Combined System
Total Passenger Boardings	1,765,471	126,144	68,671	191,015	2,151,301
Total Operating Costs	\$7,117,659	\$3,599,529	\$561,338	\$585,854	\$11,864,380
Fare Revenues	\$1,701,781	\$416,524	\$423,899	N/A	\$2,542,204
Revenue Miles	1,831,414	751,442	261,266	1,591,766	4,435,888
Revenue Hours	105,946	44,840	6,377	30,261	187,423
Peak Vehicles	29	27	7	103	166
Performance Indicators					
Cost and Financial Efficiency					
Operating Cost per Revenue Mile	\$3.89	\$4.79	\$2.15	\$0.37	\$2.67
Operating Cost per Revenue Hour	\$67.18	\$80.28	\$88.03	\$19.36	\$63.30
Annual Operating Cost per Peak Vehicle	\$245,437	\$133,316	\$80,191	\$5,688	\$71,472
Service Effectiveness					
Passenger Trips per Revenue Mile	0.96	0.17	0.26	0.12	0.48
Passenger Trips per Revenue Hour	16.66	2.81	10.77	6.31	11.48
Annual Passengers per Peak Vehicle	60,878	4,672	9,810	1,855	12,960
Cost Effectiveness					
Operating Cost per Passenger Trip	\$4.03	\$28.54	\$8.17	\$3.07	\$5.51
Farebox Recovery Ratio	23.9%	11.6%	75.5%	N/A	21.4%

Table 4-8.	<b>VVTA Performance:</b>	Actual (2013)
------------	--------------------------	---------------

1. Based on TransTrack data

2. No revenue listed in TransTrack reports; riders pay approximately 74 percent of monthly vanpool costs

# 4.2 Internal Agency Performance Review

This section provides an overview of how each operator performs against their own adopted service standards as included in their most recent SRTP or COA. Financial and service standards for key indicators have been established as benchmarks in the respective plans in order to monitor and evaluate performance. Standards are established on a modal basis. All of the tables in this section include columns indicating whether internally-established performance standards, where available, are met, with "Yes" indicating the standard is met, "No" indicating it was not met, and "Nearly Met" indicating the indicator came within 5 percent of meeting the standard.

### 4.2.1 Barstow Area Transit

The *BAT Comprehensive Operations Analysis* (SANBAG, 2009) is the agency's most recent planning document. While the COA identifies system strengths and opportunities for improvement, the actual (2013) BAT system has not incorporated or moved forward with the recommended operating changes. As such, the performance standards as defined in the COA do not have relevance to the system that is currently in operation. Due to the absence of updated standards reflecting the current system, a comparative review was not possible at the time this report was produced. It should also be noted, as discussed in Section 2.1.1.1, that, at the time of this study, BAT was in the process of merging with VVTA. VVTA will need to carefully review BAT services in the context of the new combined system network.

### 4.2.2 Morongo Basin Transit Authority

The information in this section is based on data from the *MBTA 2012 COA* (MBTA, 2012), the agency's most recent planning document. The COA evaluates transit demand and performance, as well as policies associated with operation of the MBTA system. The COA presents recommendations for enhancing MBTA services, identifying steps to implement improvements in the near-, mid-, and long-term scenarios. The information in this section uses the FY 2012/13 "mid-term" alternative, with Route 1 Sunday service and system-wide fare adjustments having been incorporated into the actual (2013) MBTA system.Table 4-9 displays MBTA performance, comparing actual (2013) performance to the agency standards listed in the COA. A discussion of the performance indicators, for which data is available, is provided below.

		Fixed Route		De	mand Respon	se
FY 2013 Statistics	FY13 Actual <sup>1</sup>	Standard <sup>2</sup>	Standard Met?	FY13 Actual <sup>1</sup>	Standard <sup>2</sup>	Standard Met?
Total Passenger Boardings	357,450	361,125	-	23,298	27,282	-
Total Operating Costs	\$1,796,920	\$1,639,264	-	\$532,770	\$460,159	-
Fare Revenues	\$352,159	\$379,181	-	\$31,041	\$32,739	-
Revenue Miles	563,127	-	-	103,536	-	-
Revenue Hours	25,872	26,132	-	7,317	6,985	-
Peak Vehicles	9	9	-	5	5	-
Performance Indicators						
Cost and Financial Efficiency						
Operating Cost per Revenue Hour	\$69.45	\$62.73	No	\$72.81	\$65.88	No
Annual Operating Cost per Peak Vehicle	\$199,658	\$182,140	No	\$106,554	\$92,032	No
Service Effectiveness						
Passenger Trips per Revenue Hour	13.82	13.82	Yes	3.18	3.90	No
Annual Passengers per Peak Vehicle	39,717	40,125	Nearly Met	4,660	5,456	No
Cost Effectiveness						
Operating Cost per Passenger Trip	\$5.03	\$4.54	No	\$22.87	\$16.87	No
Farebox Recovery Ratio	19.6%	23.1%	No	5.8%	7.1%	No

#### Table 4-9. MBTA Performance: Actual (2013) Compared to Standard

1. TransTrack data

2. *MBTA 2012 COA* (MBTA, 2012)

Fixed Route Service

Fixed route service did not meet the MBTA standards for cost and financial efficiency. The operating cost per revenue hour for fixed route service was \$69.45, which is above the standard of \$62.73. The operating cost per peak vehicle for fixed route service was \$199,658, which also fails to meet standard of \$182,140.

TransTrack data for FY 2011, FY 2012, and FY 2013 indicate that total revenue hours operated were fairly constant over this three-year period. However, combined operating costs for all fixed-route services rose 12.9 percent between FY 2011 and FY 2012, and another 3.0 percent between FY 2012 and FY 2013. MBTA staff has explained that several factors contributed to increases in FY 2012, including an accounting change ordered for accrued payroll liabilities and changes to comply with labor law interpretations for non-represented employee groups (e.g., additional and unanticipated non-revenue hours). These changes have, in turn, affected financial-related performance indicators.

The service effectiveness indicator of passenger trips per revenue hour was met. The number of annual passengers per peak vehicle, at 39,717, nearly met the standard of 40,125.

Fixed route service did not meet the standards for cost effectiveness. The operating cost per passenger was \$5.03, which was slightly above the standard of \$4.54. Also, the farebox recovery ratio was 19.6 percent, which is below the standard of 23.1 percent.

#### Demand Response Service

Demand response service did not meet the standards for cost and financial efficiency. The operating cost per revenue hour for fixed route service was \$72.81, which is above the standard of \$65.88.

Demand response service also did not meet the standards for service effectiveness. The number of passenger trips per revenue hour was 3.18, which is below the standard of 3.90. The number of passenger trips per peak vehicle was 4,660, which is below the standard of 5,456.

Demand response service also did not meet the standards for cost effectiveness. The operating cost per passenger trip was \$22.87, which exceeds the standard of \$16.87. The farebox recovery ratio was 5.8 percent, which is below the standard of 7.1 percent.

### 4.2.3 Mountain Area Regional Transit Authority

The information in this section is based on data from the *MARTA 2012-2016 SRTP* (MARTA, 2012), the agency's most recent planning document. This document is a joint COA/SRTP that evaluates and recommends improvements to MARTA services, incorporating this information into the 5-year planning process. This document presents a simplified format for performance standards, whereby it is recommended that two types of performance standards ("efficiency standards" and "service quality/reliability standards") should be compared with actual performance at the end of each fiscal year and reported to the MARTA Board of Directors every September. Efficiency standards (passengers per vehicle revenue hour, cost per vehicle revenue hour, and farebox recovery ratio) are tracked and reviewed as part of the triennial performance audit required for the utilization of TDA funds.

The MARTA 2012-2016 SRTP defines an acceptable operating cost per revenue hour each year as increasing less than the consumer price index (CPI) applied to the previous year's figure. Thus, the standard for operating cost per revenue hour was calculated by applying the growth in CPI between FY 2011 and FY 2013 to FY 2010-2011 operating cost per revenue hour data for fixed route and demand response services.

Table 4-10 displays MARTA performance, comparing actual (2013) performance to the agency standards listed in the SRTP. A discussion of the performance indicators, for which data is available, is provided below.

#### Fixed Route Service

With the exception of the Rim Off-the-Mountain (OTM) service, which did not meet its standard, all of the fixed route services were within five percent of the standards for cost and financial efficiency, specifically with regards to operating cost per revenue hour. The operating cost per revenue hour for Big Bear Valley OTM service was \$86.43, which

is within 5 percent of the standard of \$85.19. The operating cost per revenue hour for RIM OTM service was \$82.97, which is higher than the standard of \$79.01. The operating cost per revenue hour for Big Bear Valley Fixed Route service was \$75.30, which within 5 percent of the standard of \$72.67. The operating cost per revenue hour for RIM Fixed Route service was \$82.66, which is within 5 percent of the standard of \$79.13.

The SRTP's standard stated that increases in cost per revenue hour should be less that the Consumer Price Index (CPI) each year, rather than setting specific figures based on historical agency costs. Between FY 2011 (the base year in the SRTP) and FY 2013, the CPI for "All Urban Consumers" for the Los Angeles-Riverside-Orange County area (the closest CPI figures available for San Bernardino County) increased only 2.97 percent, whereas MARTA's costs fixed-route costs per revenue hour increased 6.65 percent during this two year period. Thus, the SRTP's CPI-based standard was exceeded by actual cost increase experience, affecting the indicator.

Big Bear OTM service met its standard for service effectiveness. The rest of the fixed route services did not meet standards for service effectiveness. The number of passenger trips per revenue hour for Rim OTM service was 4.30, which is less than the standard of 4.50, but within five percent. Passenger trips per revenue hour for Big Bear Valley Fixed Route service was 9.01, which is less than the standard of 12.0. Passenger trips per revenue hour for Rim Fixed Route service was 4.13, which is less than the standard of 7.0. It should be noted that for all fixed-route services overall, MARTA produced a 9.8 percent increase in passengers between FY 2011 and FY 2012, and another 6.6 percent increase in passengers between FY 2012 and FY 2013, representing solid growth. Thus, it appears that MARTA's service effectiveness standards as established in its SRTP may simply have been overly optimistic.

On cost effectiveness indicators, one fixed-route service met standard, one came within 5 percent of standard, and two did not meet standard, specifically with regard to farebox recovery ratio. Big Bear OTM service met farebox recovery ratio standards. The farebox recovery ratio for Rim OTM service was 18.9 percent, which is less than the standard of 25.0 percent. Farebox recovery ratio for Big Bear Valley Fixed Route service was 14.4 percent, which is within five percent of the standard of 15.0 percent. Farebox recovery ratio for Rim Fixed Route service was 8.4 percent, which is less than the standard of 15.0 percent. Again, given the healthy ridership increases, the SRTP cost effectiveness standards may have been overly optimistic.

It should also be noted that two financial changes during the FY2012 – FY2013 time frame occurred that impacted financially-related indicators. Due to changes in the calculation of insurance premiums, MARTA's insurer, CALJPIA, mandated \$453,386 in added prior period adjustments to their liability and worker's comp contributions, which were spread out over several years beginning in FY2012. Also, the same change in auditing procedures as mandated for MBTA affected MARTA in the accounting for accrued (but not used) vacation and sick leave expense. These two changes contributed to a 7.15 percent increase in operating cost per revenue hour, despite an ongoing wage and benefit freeze through the end of FY2013. As a result, the performance

indicators with a financial component were impacted by factors beyond MARTA's control.

Demand Response Service

Both Big Bear Valley and RIM Demand Response services met standards for cost and financial efficiency.

The demand response services did not meet the standards for service effectiveness. The Big Bear DAR (dial-a-ride) passenger trips per revenue hour was 2.10, which is less than the standard of 3.50. The Rim DAR passenger trips per revenue hour was 2.07, which is less than the standard of 3.50.

Demand response services also did not meet the standards for cost effectiveness. The Big Bear DAR farebox recovery ratio was 8.1 percent, which is less than the standard of 10.0 percent. The Rim DAR farebox recovery ratio was 6.0 percent, which is less than the standard of 10.0 percent.

						Fixed	Route						Demand Response					
FY 2013 Statistics	Big Bear OTM				Rim OTM		Big	Big Bear (1/A) Fixed		F	Rim (2/4) Fixe	d	Big Bear DAR			Rim DAR		
	FY13 Actual <sup>1</sup>	Standard <sup>2</sup>	Standard Met?															
Total Passenger Boardings	13,419	-	-	13,226	-	-	91,259	-	-	19,305	-	-	7,920	-	-	7,687	-	-
Total Operating Costs	\$249,159	-	-	\$254,898	-	-	\$762,774	-	-	\$386,025	-	-	\$323,274	-	-	\$321,275	-	-
Fare Revenues	\$80,617	-	-	\$48,190	-	-	\$109,596	-	-	\$32,270	-	-	\$26,132	-	-	\$19,352	-	-
Revenue Miles	81,476	-	-	65,416	-	-	186,517	-	-	100,370	-	-	48,395	-	-	58,662	-	-
Revenue Hours	2,883	-	-	3,072	-	-	10,130	-	-	4,670	-	-	3,777	-	-	3,722	-	-
Peak Vehicles	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Performance Indicators																		
Cost and Financial Efficie	ency																	
Operating Cost per Revenue Hour	\$86.43	\$85.19	Nearly Met	\$82.97	\$79.01	No	\$75.30	\$72.67	Nearly Met	\$82.66	\$79.13	Nearly Met	\$85.59	\$90.33	Yes	\$86.32	\$90.67	Yes
Service Effectiveness																		
Passenger Trips per Revenue Hour	4.66	4.50	Yes	4.30	4.50	Nearly Met	9.01	12.0	No	4.13	7.0	No	2.10	3.50	No	2.07	3.50	No
Cost Effectiveness																		
Farebox Recovery Ratio	32.4%	30.0%	Yes	18.9%	25.0%	No	14.4%	15.0%	Nearly Met	8.4%	15.0%	No	8.1%	10.0%	No	6.0%	10.0%	No
4		•			•		•	•						•	-			

Table 4-10. MARTA Performance: Actual (2013) Compared to Standard

1. TransTrack data 2. *MARTA 2012-2016 SRTP* (MARTA, 2012) Notes: DAR = dial-a-ride; OTM = Off-the-Mountain

THIS PAGE INTENTIONALLY LEFT BLANK

### 4.2.4 City of Needles

Financial and service standards for the City of Needles were obtained from the *Draft Needles Transit Services SRTP 2014-2018* (City of Needles, 2014b). The SRTP establishes cost and financial efficiency, service effectiveness, and cost effectiveness standards for its fixed route and demand response services. It should be noted that while the number of performance indicators for which standards have been established is lower than the more urbanized operators, they do provide a general overview of how well the City of Needles is performing. Table 4-11 displays how the City of Needles actual FY 2013 statistics and performance indicators compare to those projected in the draft SRTP.

	Fixed	Route - Purc	hased	Demand Response - Purchased						
FY 2013 Statistics	FY13 Actual <sup>1</sup>	Standard <sup>2</sup>	Standard Met?	FY13 Actual <sup>1</sup>	Standard <sup>2</sup>	Standard Met?				
Total Passenger Boardings	34,153	-	-	4,579	-	-				
Total Operating Costs	\$243,973	-	-	\$24,453	-	-				
Fare Revenues	\$35,151	-	-	\$3,572	-	-				
Revenue Miles	46,054	-	-	12,067	-	-				
Revenue Hours	3,256	-	-	1,182	-	-				
Peak Vehicles	1	-	-	2	-	-				
Performance Indicators										
Cost and Financial Efficiency										
Operating Cost per Revenue Hour <sup>3</sup>	\$74.93	\$77.09	Yes	\$20.69	\$70.06	Yes				
Service Effectiveness										
Passenger Trips per Revenue Hour	10.49	10.0	Yes	3.87	4.0	Nearly Met				
Cost Effectiveness										
Farebox Recovery Ratio	14.4%	12.0%	Yes	14.6%	12.0%	Yes				

### Table 4-11. City of Needles Performance: Actual (2013) Compared to Standard

1. TransTrack data

2. Draft Needles Transit Services SRTP 2014-2018

3. Standard is no more than 110 percent of the average of BAT, MBTA, and MARTA systems, per the *Draft Needles Transit Services SRTP 2014-2018* 

**Fixed Route Service** 

As shown above, fixed route service met its standards for cost and financial efficiency, service effectiveness, and cost effectiveness.

**Demand Response Service** 

The City of Needles demand response service met the standards for cost and financial efficiency, as well as cost effectiveness. The number of passenger trips per revene hour was 3.87, which is within five percent of the standard of 4.0.

### 4.2.5 Omnitrans

Financial and service standards for Omnitrans were obtained from the *Omnitrans Management Plan, FY 2014-2015* (Omnitrans, 2014c), which includes projected figures for FY 2013. These projected FY 2013 figures were used as the standards against which the agency's performance was measured.

Projected FY 2013 figures are provided for the fixed route (both directly operated and purchased) and demand response services covering all base statistics, which include:

- Total Passenger Boardings
- Total Operating Costs
- Fare Revenues
- Revenue Miles
- Revenue Hours
- Peak Vehicles

Table 4-12 displays how Omnitrans actual FY 2013 statistics and performance indicators compare to those projected in the *Omnitrans Management Plan, FY 2014-2015.* 

	Fixed Ro	ute - Direct Op	erated	Fixed F	Route - Purch	nased	Demand Response - Purchased				
FY 2013 Statistics	FY13 Actual <sup>1</sup>	Standard <sup>2</sup>	Standard Met?	FY13 Actual <sup>1</sup>	Standard <sup>2</sup>	Standard Met?	FY13 Actual <sup>1</sup>	Standard <sup>2</sup>	Standard Met?		
Total Passenger Boardings	15,509,733	15,672,000	-	145,366	155,000	-	491,179	488,000	-		
Total Operating Costs	\$54,906,414	\$69,272,707	-	\$1,871,251	\$1,595,198	-	\$12,569,094	\$10,586,569	-		
Fare Revenues	\$13,031,443	\$13,196,000	-	\$121,661	\$130,000	-	\$1,584,790	\$1,574,000	-		
Revenue Miles	7,491,400	7,519,000	-	369,656	371,000	-	3,005,252	2,876,000	-		
Revenue Hours	588,157	589,000	-	27,703	28,000	-	182,214	183,000	-		
Peak Vehicles	136	136	-	8	7	-	96	99	-		
Performance Indicators	S			•		·		•	•		
Cost and Financial Efficiency											
Operating Cost per Revenue Mile	\$7.33	\$9.21	Yes	\$5.06	\$4.30	No	\$4.18	\$3.68	No		
Operating Cost per Revenue Hour	\$93.35	\$117.61	Yes	\$67.55	\$56.97	No	\$68.98	\$57.85	No		
Operating Cost per Peak Vehicle	\$403,724	\$509,358	Yes	\$233,906	\$227,885	Nearly Met	\$130,928	\$106,935	No		
Service Effectiveness											
Passenger Trips per Revenue Mile	2.07	2.08	Nearly Met	0.39	0.42	No	0.16	0.17	Nearly Met		
Passenger Trips per Revenue Hour	26.37	26.61	Nearly Met	5.25	5.54	No	2.70	2.67	Yes		
Passengers per Peak Vehicle	114,042	115,235	Nearly Met	18,171	22,143	No	5,116	4,929	Yes		
Cost Effectiveness											
Operating Cost per Passenger Trip	\$3.54	\$4.42	Yes	\$12.87	\$10.29	No	\$25.59	\$21.69	No		
Farebox Recovery Ratio	23.7%	19.0%	Yes	6.5%	8.1%	No	12.6%	14.9%	No		

# Table 4-12. Omnitrans Performance: Actual (2013) Compared to Standard

1. TransTrack data

2. Omnitrans Management Plan, FY2014-2015 (Omnitrans, 2014c)

#### Fixed Route Services

The directly operated fixed route service met all cost and financial efficiency standards; however the purchased fixed route service did not. The operating cost per revenue mile for the later was \$5.06, which exceeds the standard of \$4.30. Purchased fixed-route service's operating cost per revenue hour was \$67.55, which exceeds the standard of \$56.97. Operating cost per peak vehicle was \$233,906, which is within five percent of the standard of \$227,885.

The directly operated fixed route service nearly met standards for service effectiveness, while the purchased fixed-route service did not meet standards. The number of passenger trips per revenue mile for directly operated service was 2.07, which is within five percent of the standard of 2.08. Passenger trips per revenue mile for purchased fixed route service was 0.39, which is slightly less than the standard of 0.42. The number of passenger trips per revenue hour for directly operated service was 26.37, which is within five percent of the standard of 26.61. The number of passenger trips per peak vehicle for directly operated service was 114,042, which is within five percent of the standard of 115,235. Passenger trips per revenue hour for purchased fixed route service was 5.25, which is less than the standard of 5.54.

The direct-operated fixed route service met its standards for cost effectiveness, however purchased fixed route service did not. The operating cost per passenger trip for purchased fixed route service was \$12.87, which exceeds the standard of \$10.29. Also, farebox recovery ratio for the purchased fixed route service was 6.5 percent, which is below the standard of 8.1 percent.

#### Demand Response Service

The demand response service did not meet standards for cost and financial efficiency. The operating cost per revenue mile was \$4.18, which is higher than the standard of \$3.68. The operating cost per revenue hour was \$68.98, which is higher than the standard of \$57.85. The demand response services narrowly missed meeting the standard for passenger trips per revenue mile. The actual value was 0.16, which is within five percent of the standard of 0.17. The other two standards for service effectiveness (i.e. passenger trips per revenue hour and passengers per peak vehicle) were met.

The demand response services also did not meet the standard for cost effectiveness. The operating cost per passenger trip was \$25.59, higher than the standard of \$21.69. The farebox recovery ratio was 12.6 percent, which is less than the standard of 14.9 percent.

### 4.2.6 Victor Valley Transit Authority

Financial and service standards for VVTA were obtained from the *COA and SRTP of VVTA* (VVTA, 2013). The VVTA COA establishes standards for each of the fixed route and demand response services, including weekday and Saturday service. Table 4-13 and Table 4-14 display how VVTA's actual FY2013 statistics and performance indicators compare to those identified in the *COA/SRTP of the VVTA*, for weekday and Saturday service, respectively.

		Fixed Route														Demand Response		nse
		Local	-	Circ	ulator/Devia	ted		County		Life	eline (B-V Lir	nk)	Commu	ter (NTC Con	nmuter)	D	irect Access	5
FY 2013 Statistics	FY13 Actual <sup>1</sup>	COA Standard <sup>2</sup>	Standard Met?															
Total Passenger																		
Boardings	1,302,379	-	-	174,953	-	-	75,864	-	-	16,213	-	-	68,671	-	-	119,396	-	-
Total Operating				• · - · - ·			•			• · · · · · · · ·			•			• • • • • • • •		
Costs	\$3,840,610	-	-	\$1,248,172	-	-	\$823,524	-	-	\$199,938	-	-	\$561,338	-	-	\$3,339,541	-	-
Fare Revenues	\$1,134,490	-	-	\$152,648	-	-	\$181,905	-	-	\$46,109	-	-	\$423,899	-	-	\$393,927	-	-
Revenue Miles	893,628	-	-	290,142	-	-	319,112	-	-	76,412	-	-	261,266	-	-	696,046	-	-
Revenue Hours	58,068	-	-	18,815	-	-	11,670	-	-	2,321	-	-	6,377	-	-	41,585	-	-
Performance Indicators																		
Cost and Financial E	Efficiency																	
Operating Cost per Revenue Mile	\$4.30	\$4.00	No	\$4.30	\$4.00	No	\$2.58	\$3.00	Yes	\$2.62	\$3.50	Yes	\$2.15	\$3.50	Yes	\$4.80	\$4.25	No
Operating Cost per	\$66.14	\$60.00	No	\$66.34	00.092	No	\$70.57	\$75.00	Ves	\$86.15	\$75.00	No	\$88.03	\$75.00	No	\$80.31	\$70.00	No
Service Effectivenes	φ00.14	ψ00.00		φ00.0 <del>1</del>	ψ00.00		ψ10.01	ψ/ 0.00	163	ψ00.10	ψ/ 0.00		ψ00.00	ψ10.00		ψ00.01	ψ/ 0.00	
Passenger Trips per																		
Revenue Mile	1.46	1.40	Yes	0.60	0.50	Yes	0.24	0.20	Yes	0.21	0.15	Yes	0.26	0.20	Yes	0.17	N/A	N/A
Passenger Trips per																		
Revenue Hour	22.43	20.00	Yes	9.30	8.00	Yes	6.50	5.00	Yes	6.99	3.50	Yes	10.77	5.00	Yes	2.87	2.50	Yes
Cost Effectiveness																		
Operating Cost per																		
Passenger Trip	\$2.95	\$3.15	Yes	\$7.13	\$9.00	Yes	\$10.86	\$14.00	Yes	\$12.33	\$27.50	Yes	\$8.17	\$14.00	Yes	\$27.97	\$30.00	Yes
Farebox Recovery Ratio	29.5%	30.0%	Nearly Met	12.2%	12.0%	Yes	22.1%	10.0%	Yes	23.1%	10.0%	Yes	75.5%	90.0%	No	11.8%	10.0%	Yes

 Table 4-13.
 VVTA Performance (Weekday):
 Actual (2013)
 Compared to Standard

1. Based on TransTrack data 2. Based on the *COA and SRTP of VVTA* (VVTA, 2013)

	Fixed Route								Demand Response			
	Local			Circulator/Deviated			County			Direct Access		
FY 2013 Statistics	FY13 Actual <sup>1</sup>	COA Standard <sup>2</sup>	Standard Met?									
Total Passenger Boardings	160,524	-	-	26,088	-	-	9,450	-	-	6,748	-	-
Total Operating Costs	\$625,665	-	-	\$233,505	-	-	\$146,245	-	-	\$259,988	-	-
Fare Revenues	\$139,321	-	-	\$22,676	-	-	\$24,633	-	-	\$22,597	-	-
Revenue Miles	143,535	-	-	55,068	-	-	53,518	-	-	55,396	-	-
Revenue Hours	9,453	-	-	3,491	-	-	2,128	-	-	3,255	-	-
Peak Vehicles		-	-		-	-		-	-		-	-
Performance Indicators	Performance Indicators											
Cost and Financial Efficiency:												
Operating Cost per Revenue Mile	\$4.36	\$4.00	No	\$4.24	\$4.00	No	\$2.73	\$3.00	Yes	\$4.69	\$4.25	No
Operating Cost per Revenue Hour	\$66.19	\$60.00	No	\$66.88	\$60.00	No	\$68.71	\$75.00	Yes	\$79.88	\$70.00	No
Service Effectiveness:												
Passenger Trips per Revenue Mile	1.12	1.10	Yes	0.47	0.40	Yes	0.18	0.15	Yes	0.12	N/A	N/A
Passenger Trips per Revenue Hour	16.98	16.00	Yes	7.47	6.00	Yes	4.44	4.00	Yes	2.07	2.00	Yes
Cost Effectiveness:												
Operating Cost per Passenger Trip	\$3.90	\$4.25	Yes	\$8.95	\$10.50	Yes	\$15.48	\$20.00	Yes	\$38.53	\$35.00	No
Farebox Recovery Ratio	22.3%	25.0%	No	9.7%	10.0%	Nearly Met	16.8%	15.0%	Yes	8.7%	9.0%	Nearly Met

 Table 4-14.
 VVTA Performance (Saturday):
 Actual (2013)
 Compared to Standard

1. Based on TransTrack data 2. Based on the VVTA COA

Local Fixed Route Service

As shown above, local fixed route weekday and Saturday service did not meet the standards related to cost and financial efficiency. The weekday operating cost per revenue mile was \$4.30, which is higher than the standard of \$4.00. The weekday operating cost per revenue hour was \$66.14, which is higher than the standard of \$60.00. The Saturday operating cost per revenue mile was \$4.36, which exceeds the standard of \$4.00. The Saturday operating cost per revenue hour was \$66.19, which is above the standard of \$60.00.

Both the local fixed route weekday and Saturday services metall of their respective standards related to service effectiveness.

With regards to cost effectiveness, both the local fixed route weekday and Saturday services met the operating cost per passenger trip standards, but failed to meet farebox recovery standards. The farebox recovery ratio for weekday service was 29.5 percent, which is within five percent of the standard of 30.0 percent. The farebox recovery ratio for Saturday service was 22.3 percent, which is below the standard of 25.0 percent.

#### Circulator/Deviated Fixed Route Service

As shown above, local circulator/deviated weekday and Saturday service did not meet the standards related to cost and financial efficiency. The weekday operating cost per revenue mile was \$4.30, which exceeds the standard of \$4.00. The weekday operating cost per revenue hour was \$66.34, which exceeds the standard of \$60.00. The Saturday operating cost per revenue mile was \$4.24, which exceeds the standard of \$4.00. The standard of \$4.00. The standard of \$60.00.

Both the weekday and Saturday services met their respective service effectiveness standards.

The weekday service met both the standards for cost effectiveness; however the farebox recovery ratio standard for Saturday service was not met. The farebox recovery ratio for Saturday service was 9.7 percent, which is within five percent of the standard of 10.0 percent.

#### County Fixed Route Service

As shown above, county fixed route service met all of the standards for cost and financial efficiency, service effectiveness, and cost effectiveness for both weekday and Saturday service.

#### Lifeline (B-V Link) Fixed Route Service

As shown above, lifeline (B-V Link) fixed route weekday service did not meet its standard for operating cost per revenue hour, with the actual cost per revenue hour of \$86.15 exceeding the standard of \$75.00. The standards for this service type were met for all other performance indicators. Lifeline (B-V Link) fixed route service is not currently offered on Saturday.

Commuter (NTC Commuter) Fixed Route Service

Commuter (NTC Commuter) fixed route weekday service met the standard for operating cost per revenue mile, but did not meet the standard for operating cost per revenue hour. The actual cost per revenue hour was \$88.03, which exceeds the standard of \$75.00. Commuter (NTC Commuter) fixed route service is not currently offered on Saturday.

The weekday service met both of the service effectiveness standards. In regards to cost effectiveness, the service met the standard for operating cost per passenger trip, but did not meet the farebox recovery ratio standard. The farebox recovery ratio for weekday service was 75.5 percent compared to a standard of 90.0 percent. Nonetheless, to achieve a 75.5 percent farebox recovery ratio on any public transit service is very impressive.

#### Demand Response Service

As shown in the tables above, weekday and Saturday demand response service did not meet their cost and financial efficiency standards. The weekday operating cost per revenue mile was \$4.80, which is above the standard of \$4.25. The weekday operating cost per revenue hour was \$80.31, which is above the standard of \$70.00. The Saturday operating cost per revenue mile was \$4.69, which is above the standard of \$4.25. The Saturday operating cost per revenue hour was \$79.88, which is above the standard of \$70.00.

Both the weekday and Saturday services did, however, meet the standards for service effectiveness, specifically passenger trips per revenue hour.

The cost effectiveness standards were met for the weekday service, but were not met for the Saturday service. The actual operating cost per passenger trip for Saturday service was \$38.53, which is above the standard of \$35.00. The farebox recovery ratio for the Saturday service was 8.7 percent, which within five percent of the standard of 9.0 percent.

# 4.3 Peer Agency Performance Review

The Peer Agency Performance Review compares a transit agency's performance with that of similar agencies in terms of size, services operated, and/or service area characteristics. The key to conducting such an analysis is to identify appropriate peers and a uniform source of data.

Approach – Urbanized Operators (Omnitrans and VVTA)

In order to conduct this portion of the study, peer agencies were identified using National Transit Database (NTD) information for 2012, the most recent year available. Omnitrans and VVTA are considered urbanized area transit operators and are "Full Reporters" under the NTD program. As a result, detailed information is available in the NTD for these two agencies to conduct a peer review using performance indicators similar to those reviewed earlier in this report.

In order to select peers for comparison, a web-based tool sponsored by the Florida Department of Transportation was utilized for this purpose. Referred to as INTDAS, or Integrated National Transit Database Analysis System (<u>http://www.ftis.org/index.html</u>), this tool uses transit and demographic factors available on each full-reporter agency to create "likeness scores" for all agencies, and provides a listing in likeness-score order of the most- like to least-like agencies. Using this tool, the consultant team identified the following peer agencies for Omnitrans and VVTA, which were focused only on California agencies given the unique funding mechanisms:

#### **Omnitrans Peers:**

Riverside Transit Agency (RTA) Fresno Area Express (FAX) San Mateo County Transit District (SamTrans) San Joaquin Regional Transit District (RTD) Golden Empire Transit District (GET - Bakersfield) North County Transit District (NCTD - North San Diego County)

#### **VVTA Peers:**

Yuba-Sutter Transit Authority The Eastern Contra Costa Transit Authority (Tri Delta Transit) City of Visalia - Visalia City Coach Modesto Area Express Merced County Transit

Approach – Rural Operators (Barstow, MBTA, MARTA, City of Needles)

The NTD data available for the rural operators is more limited. Rural operators in California report through Caltrans as "sub-recipients" of various FTA funding sources. A limited amount of modal-level service data, financial data, and vehicle inventory data is available on the NTD "Rural" webpage.

There is no web-based peer selection tool to select the peers for the rural operators. In this case, the consultant team downloaded the Rural Operator NTD Excel files, filtered for California operators, and screened for agencies within  $\pm 25$  percent for fleet size, revenue hours, revenue miles, and passenger trips. The team focused particularly on fleet size and revenue hours as good overall size indicators. Four to five peers were selected for each of the rural operators as follows:

### **BAT Peers:**

City of Tulare MBTA MARTA San Benito County LTA Tulare County Area Transit

### **MBTA Peers:**

BAT Lake Transit Authority MARTA MBTA Tulare County Area Transit

### **MARTA Peers:**

BAT Humboldt Transit Authority MBTA Tuolumne County Transit

#### **City of Needles Peers:**

City of Escalon City of McFarland City of Rio Vista Trinity County

As indicated above, MBTA, MARTA, and BAT are all relatively similar in fleet size and revenue hours and thus were selected as peers for each other in this analysis. This selection had an additional advantage: The Rural Operator NTD files do not have financial information at the mode level but rather only at the system level. By selecting MBTA, MARTA, and BAT as mutual peers, mode-level financial data from their FY2012 TransTrack files could be combined with the NTD service information to prepare the peer comparison charts of performance indicators. For this reason, in the following peer comparison charts involving a financial component, only MBTA, MARTA, and BAT are shown since those are the only peers with financial data at the modal level available.

The City of Needles is in a class by itself as a very small transit agency, so peers with somewhat more variation in the selection variables had to be used to identify a viable pool of peers.

Peer Agency Reviews

The following discussion and charts summarizes the peer agency performance analysis for each of the six San Bernardino County transit agencies.

#### 4.3.1 Barstow Area Transit Peer Review

As noted, the peer review for BAT involves comparing operations to other rural operators, including the City of Tulare, MBTA, MARTA, San Benito County Local Transit Authority (San Benito County LTA), and Tulare County Area Transit. Table 4-15 provides a summary of service and financial data by service type for BAT and the selected peers. As can be seen from the table, the peers are relatively comparable in terms of revenue hours, revenue miles, and fleet size, though there is variation.

The statistics shown in Table 4-15 were used to calculate performance indicators of BAT's financial efficiency, service effectiveness, and cost effectiveness. A comparison of these performance indicators between BAT and the peer operators is shown below.

			Fixed R	oute		Demand Response						
FY 2012 Statistics <sup>1,2</sup>	BAT	City of Tulare	MBTA	MARTA	San Benito County LTA	Tulare County Area Transit	BAT	City of Tulare	MBTA	MARTA	San Benito County LTA	Tulare County Area Transit
Total												
Boardings	191,155	420,950	361,442	128,929	71,709	295,747	22,674	18,204	26,231	15,739	69,705	12,546
Total Operating Costs	\$1,418,427	-	\$1,743,885	\$1,560,750	-	-	\$745,060	-	\$531,090	\$635,345	-	-
Fare Revenues	\$160,269	-	\$387,334	\$260,799	-	-	\$32,392	-	\$28,196	\$45,940	-	-
Revenue Miles	422,016	466,622	575,069	435,917	193,660	794,443	275,395	66,148	105,569	100,322	287,039	48,193
Revenue Hours	21,544	24,784	25,697	21,000	10,257	28,517	14,453	5,447	7,405	7,491	19,624	3,655
Peak Vehicles <sup>3</sup>	8	-	9	7	-	-	7	-	5	4	-	-

### Table 4-15. BAT Performance: Peer Comparison

Notes:

1. NTD, 2012

2. Data for BAT, MBTA, and MARTA based on TransTrack Data

3. Based on existing (2014) transit operator data

Figure 4-1 displays the peer review information for BAT's fixed route and demand response services on cost and financial efficiency performance indicators:

Fixed Route:

- Operating Cost per Revenue Mile of \$3.36 was median cost of the group
- Operating Cost per Revenue Hour of \$65.84 was the lowest cost of the group
- Annual Cost per Peak Vehicle at \$177,303 was the lowest cost of the group Demand Response:
  - Operating Cost per Revenue Mile of \$2.71 was the lowest cost of the group
  - Operating Cost per Revenue Hour of \$51.55 was the lowest cost of the group
  - Annual cost per Peak Vehicle at \$106,437 was the median cost of the group



Figure 4-1. BAT Cost and Financial Efficiency Performance Comparison

Figure 4-2 displays the peer review information for BAT's fixed route and demand response services on service effectiveness indicators:

Fixed Route:

- Passenger Trips per Revenue Mile of 0.45 was higher than the group median
- Passenger Trips per Revenue Hour of 8.87 was lower than the group median
- Annual Passengers per Peak Vehicle of 23,894 was the median of the group Demand Response:
  - Passenger Trips per Revenue Mile of 0.08 was the lowest of the group
  - Passenger Trips per Revenue Hour of 1.57 was the lowest of the group
  - Annual Passengers per Peak Vehicle of 3,239 was the lowest of the group



Figure 4-2. BAT Service Effectiveness Performance Comparison

Source: NTD, 2012

Figure 4-3 displays the peer review information for BAT's fixed route and demand response services on cost effectiveness indicators:

Fixed Route:

- Operating Cost per Passenger Trip of \$7.42 was the median cost of the group
- Farebox recovery ratio of 11.3 percent was the lowest of the group Demand Response:
  - Operating Cost per Passenger Trip of \$32.86 was the median cost of the group
  - Farebox Recovery Ratio of 4.3 percent was the lowest of the group



Figure 4-3. BAT Cost Effectiveness Performance Comparison

Source: NTD, 2012

### 4.3.2 Morongo Basin Transit Authority Peer Review

As noted, the peer review for MBTA involves comparing operations to other rural operators, including BAT, Lake Transit Authority, MARTA, and Tulare County Area Transit. Table 4-16 provides a summary of service and financial data for MBTA and the selected peer group. Again, the goal was to utilize peers with roughly similar revenue hours and fleet size values.

The statistics shown in Table 4-16 were used to calculate performance indicators of financial efficiency, service effectiveness, and cost effectiveness. A comparison of these performance indicators between MBTA and the peer operators is shown below.

			Fixed Route		Demand Response						
FY 2012 Statistics <sup>1,2</sup>	MBTA	BAT	Lake Transit Authority	MARTA	Tulare County Area Transit	MBTA	BAT	Lake Transit Authority	MARTA	Tulare County Area Transit	
Total Passenger Boardings	361,442	191,155	278,575	128,929	295,747	26,231	21,691	22,745	15,739	12,546	
Total Operating Costs	\$1,743,885	\$1,418,427	-	\$1,560,750	-	\$531,090	\$745,060	-	\$635,345	-	
Fare Revenues	\$387,334	\$160,269	-	\$260,799	-	\$28,196	\$32,392	-	\$45,940	-	
Revenue Miles	572,477	421,950	386,643	435,917	794,443	110,316	116,747	66,284	100,322	48,193	
<b>Revenue Hours</b>	25,697	21,543	18,779	21,000	28,517	7,405	9,622	8,649	7,491	3,655	
Peak Vehicles <sup>3</sup>	9	8	-	7	-	5	7	-	4	-	

### Table 4-16. MBTA Performance: Peer Comparison

Notes:

1. NTD, 2012

2. Data for BAT, MBTA, and MARTA based on TransTrack Data

3. Based on existing (2014) transit operator data

Figure 4-4 displays the peer review information for MBTA's fixed route and demand response services on cost and financial efficiency indicators:

Fixed Route:

- Operating Cost per Revenue Mile of \$3.05 was lowest cost of the group
- Operating Cost per Revenue Hour of \$67.68 was the median cost of the group
- Annual Cost per Peak Vehicle at \$193,765 was the median cost of the group Demand Response:
  - Operating Cost per Revenue Mile of \$4.81 was the lowest cost of the group
  - Operating Cost per Revenue Hour of \$71.72 was the lowest cost of the group
  - Annual cost per Peak Vehicle at \$106,218 was the lowest cost of the group



Figure 4-4. MBTA Cost and Financial Efficiency Performance Comparison

Source: NTD, 2012

Figure 4-5 displays the peer review information for MBTA's fixed route and demand response services on service effectiveness indicators:

Fixed Route:

- Passenger Trips per Revenue Mile of 0.63 was second-best of the group
- Passenger Trips per Revenue Hour of 14.07 was better than the median
- Annual Passengers per Peak Vehicle of 40,160 was the highest of the group Demand Response:
  - Passenger Trips per Revenue Mile of 0.24 was the median ridership
  - Passenger Trips per Revenue Hour of 3.54 was the highest ridership
  - Annual Passengers per Peak Vehicle of 5,246 was the highest ridership



Figure 4-5. MBTA Service Effectiveness Performance Comparison

Figure 4-6 displays the peer review information for MBTA's fixed route and demand response services on cost effectiveness indicators:

Fixed Route:

- Operating Cost per Passenger Trip of \$4.82 was the lowest cost of the group
- Farebox recovery ratio of 22.2 percent was the highest of the group

Demand Response:

- Operating Cost per Passenger Trip of \$20.25 was the lowest cost of the group
- Farebox recovery ratio of 5.3 percent was the median of the group



Figure 4-6. MBTA Cost Effectiveness Performance Comparison

Source: NTD, 2012

# 4.3.3 Mountain Area Regional Transit Authority Peer Review

As noted, the peer review for MARTA involved comparing operations to other rural operators, including BAT, Humboldt Transit Authority, MBTA, and Tuolumne County Transit. Humboldt Transit Authority does not operate a demand response service, therefore it was only included in the peer review for fixed route service.

Table 4-17 provides a summary of service and financial data for MARTA and the selected peers.

The statistics shown in Table 4-17 were used to calculate performance indicators which show MARTA's financial efficiency, service effectiveness, and cost effectiveness. A comparison of these performance indicators between MARTA and the peer operators is shown below.
		Fixed Route					Demand Response			
FY 2012 Statistics <sup>1,2</sup>	MARTA	BAT	Humboldt Transit Authoritv	MBTA	Tuolumne County Transit	MARTA	BAT	MBTA	Tuolumne County Transit	
Total Passenger Boardings	129,243	191,155	568,648	361,442	80,267	15,739	21,691	26,231	26,181	
Total Operating Costs	\$1,560,750	\$1,418,427	-	\$1,743,885	-	\$635,345	\$745,060	\$531,090	-	
Fare Revenues	\$260,799	\$160,269	-	\$387,334	-	\$45,940	\$32,392	\$28,196	-	
Revenue Miles	435,917	421,950	657,600	575,069	201,901	100,322	116,747	105,569	131,287	
Revenue Hours	21,002	21,543	28,632	25,697	13,400	7,490	9,622	7,405	8,653	
Peak Vehicles <sup>3</sup>	7	8	-	9	-	4	7	5	-	

# Table 4-17. MARTA Performance: Peer Comparison

Notes:

1. NTD, 2012

2. Data for BAT, MBTA, and MARTA based on TransTrack Data

3. Based on existing (2014) transit operator data

Figure 4-7 displays the peer review information for MARTA's fixed route and demand response services on cost and financial efficiency indicators:

Fixed Route:

- Operating Cost per Revenue Mile of \$3.58 was highest cost of the group
- Operating Cost per Revenue Hour of \$74.31 was the highest cost of the group
- Annual Cost per Peak Vehicle at \$222,964 was the highest cost of the group Demand Response:
  - Operating Cost per Revenue Mile of \$6.33 was the median cost of the group
  - Operating Cost per Revenue Hour of \$84.83 was the highest cost of the group
  - Annual cost per Peak Vehicle at \$158,836 was the highest cost of the group



Figure 4-7. MARTA Cost and Financial Efficiency Performance Comparison

Source: NTD, 2012

Figure 4-8 displays the peer review information for MARTA's fixed route and demand response services on service effectiveness indicators:

Fixed Route:

- Passenger Trips per Revenue Mile of 0.30 was the lowest of the group
- Passenger Trips per Revenue Hour of 6.15 was the second-lowest of the group

• Annual Passengers per Peak Vehicle of 18,463 was the lowest of the group Demand Response:

- Passenger Trips per Revenue Mile of 0.16 was the lowest of the group
- Passenger Trips per Revenue Hour of 2.10 was the lowest of the group
- Annual Passengers per Peak Vehicle of 3,935 was the median of the group



Figure 4-8. MARTA Service Effectiveness Performance Comparison

Figure 4-9 displays the peer review information for MARTA's fixed route and demand response services on cost effectiveness indicators:

Fixed Route:

- Operating Cost per Passenger Trip of \$12.08 was the highest cost of the group
- Farebox recovery ratio of 16.7 percent was the median of the group

Demand Response:

- Operating Cost per Passenger Trip of \$40.37 was the highest cost of the group
- Farebox Recovery Ratio of 7.2 percent was the highest of the group



Figure 4-9. MARTA Cost Effectiveness Performance Comparison

Source: NTD, 2012

#### 4.3.4 City of Needles Peer Review

The peer review for the City of Needles involved comparing operations to other very small rural operators, including the City of Escalon, City of McFarland, City of Rio Vista, and Trinity County. Financial data for each of the peer operators was not available from the NTD, therefore the peer review focused on service effectiveness. Also, operations data for demand response service was unavailable at the time of this study. As a result, the peer review focused on fixed route service only.

Table 4-18 provides a summary of service data for the City of Needles and its peers.

Fixed Route City of City of City of City of Rio FY 2012 Statistics Frinity Count arlano Total Passenger Boardings 29,094 1,358 17,305 14,804 11,852 Total Operating Costs \$239,659 Fare Revenues \$31,800 **Revenue Miles** 45,823 24,499 19,858 127,929 134,669 **Revenue Hours** 3,300 1,023 1,868 5,551 4,457 Peak Vehicles<sup>3</sup> ---

Table 4-18. City of Needles Performance: Peer Comparison

Notes:

1. NTD, 2012

2. Data for the City of Needles based on TransTrack Data

3. Based on existing (2014) transit operator data

The statistics shown in Table 4-18 were used to calculate performance indicators which show the City of Needles' service effectiveness. A comparison of these performance indicators between the City of Needles and the peer operators is shown below in Figure 4-10.

As shown below, the City of Needles' 0.63 passenger trips per mile and 8.82 passenger trips per hour both ranked second highest for fixed route service amongst the peers.



Figure 4-10. City of Needles Service Effectiveness Performance Comparison

# 4.3.1 Omnitrans Peer Review

As noted, the peer review for Omnitrans involved comparing operations to other urbanized operators, including Riverside Transit Agency (RTA), Fresno Area Express (FAX), San Mateo County Transit District (SamTrans), San Joaquin Regional Transit District (RTD), Golden Empire Transit District (GET – Bakersfield) and North County Transit District (NCTD – North San Diego County). Table 4-19 provides a summary of service and financial data for Omnitrans and the selected peers. It should be noted that NCTD was used as a peer only for the fixed-route comparisons; NCTD has recently implemented a different service delivery method for its demand response mode utilizing a transportation broker and shared-ride taxis/private transportation companies, so the demand response mode was not directly comparable.

The statistics shown in Table 4-19 were used to calculate performance indicators which show Omnitrans' and each peer agency's financial efficiency, service effectiveness, and cost effectiveness. A comparison of these performance indicators between Omnitrans and its peer operators is shown below.

FY12 STATISTICS		Fixed Route – Directly Operated						Demand Response					
	Omnitrans	NCTD	RTA	FAX	SamTrans	RTD	GET	Omnitrans	RTA	FAX	SamTrans	RTD	GET
Service Area Population	1,470,000	896,787	1,700,356	505,009	737,100	685,306	473,348	3 Same as Fixed Route					
Total Passenger Boardings	15,673,759	7,905,588	8,070,021	14,304,222	13,118,261	3,987,980	7,158,537	478,342	372,322	209,473	261,958	31,821	52,941
Total Operating Costs	\$55,717,997	\$40,509,341	\$34,832,034	\$39,368,446	\$101,387,955	\$24,834,690	\$22,258,545	\$12,740,647	\$9,180,493	\$6,015,311	\$12,058,913	\$1,494,448	\$1,554,473
Fare Revenues	\$13,145,416	\$7,994,043	\$8,106,914	\$9,683,538	\$18,142,884	\$3,725,205	\$5,311,836	\$1,459,256	\$1,274,565	\$267,557	\$686,358	\$87,406	\$131,649
Revenue Miles	7,909,565	5,237,788	5,974,436	3,881,078	6,570,084	2,211,781	3,735,670	2,940,052	3,072,632	1,123,877	2,120,098	193,173	402,473
Revenue Hours	612,394	391,500	416,771	329,995	601,283	175,137	300,326	183,631	164,905	93,727	153,911	8,931	26,418
Peak Vehicles	145	125	114	81	266	74	70	88	75	47	86	18	16

# Table 4-19. Omnitrans Performance: Peer Comparison

Source: NTD, 2012

THIS PAGE INTENTIONALLY LEFT BLANK

Figure 4-11 displays the peer review information for Omnitrans' fixed route and demand response services on cost and financial indicators:

Fixed Route:

- Operating Cost per Revenue Mile of \$7.04 was lower cost than the median
- Operating Cost per Revenue Hour of \$90.98 was lower cost than the median
- Annual Cost per Peak Vehicle at \$384,262 was the second highest cost Demand Response:
  - Operating Cost per Revenue Mile of \$4.33 was lower cost than the median
  - Operating Cost per Revenue Hour of \$69.38 was higher cost than the median
  - Annual cost per Peak Vehicle at \$144,780 was the highest cost of the group





SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

Figure 4-12 displays the peer review information for Omnitrans' fixed route and demand response services on service effectiveness indicators:

Fixed Route:

- Passenger Trips per Revenue Mile of 1.98 was higher than the median
- Passenger Trips per Revenue Hour of 25.29 was second-best of the group

• Annual Passengers per Peak Vehicle of 108,095 was second-best of the group Demand Response:

- Passenger Trips per Revenue Mile of 0.16 was better than the median
- Passenger Trips per Revenue Hour of 2.60 was second-best of the group
- Annual Passengers per Peak Vehicle of 5,436 was the highest of the group



Figure 4-12. Omnitrans Service Effectiveness Performance Comparison

Source: NTD, 2012

Figure 4-13 displays the peer review information for Omnitrans' fixed route and demand response services on cost effectiveness indicators:

Fixed Route:

• Operating Cost per Passenger Trip of \$3.55 was lower cost than the median

• Farebox recovery ratio of 23.6 percent was higher than the median of the group Demand Response:

- Operating Cost per Passenger Trip of \$26.64 was the second-best of the group
- Farebox Recovery Ratio of 11.5 percent was the second-best of the group



Figure 4-13. Omnitrans Cost Effectiveness Performance Comparison

Source: NTD, 2012

## 4.3.2 Victor Valley Transit Authority Peer Review

The peer review for VVTA involves comparing operations to other urbanized operators, including Yuba-Sutter Transit Authority (YSTA), Eastern Contra Costa Transit (Tri Delta Transit), Visalia City Coach (Visalia Transit), Modesto Area Express (MAX), and Merced County Transit (The Bus). Table 4-20 provides a summary of service and financial data for VVTA and its peers.

The statistics shown in Table 4-20 were used to calculate performance indicators which show VVTA's and peer agencies' financial efficiency, service effectiveness, and cost effectiveness. A comparison of these performance indicators between VVTA and its peer operators is shown below.

# THIS PAGE INTENTIONALLY LEFT BLANK

		Fixed Route					Demand Response					
EV 2012 Statistics <sup>1</sup>		VSTA	Tri Delta	Visalia Transit		The Pue		VSTA	Tri Delta	Visalia Transit		The Bus
Service Area Population	334,988	119.420	270.000	126.000	253.607	120.000	VVIA	131A	Same as Fi	xed Route	IMAA	The bus
Total Passenger Boardings	1,767,178	975,805	2,431,768	1,779,676	3,434,360	837,815	113,434	68,776	130,619	40,896	117,196	192,114
Total Operating Costs	\$7,067,402	\$3,093,034	\$16,045,646	\$8,733,373	\$12,104,725	\$5,606,435	\$3,214,582	\$1,386,713	\$3,995,257	\$970,375	\$2,356,384	\$3,192,192
Fare Revenues	\$1,609,072	\$549,985	\$2,533,456	\$1,183,177	\$2,392,215	\$1,072,043	\$375,728	\$137,496	\$449,819	\$131,464	\$253,743	\$468,652
Revenue Miles	1,854,239	555,426	2,151,236	1,603,602	1,883,780	1,255,179	675,169	300,211	765,586	151,946	474,658	701,088
Revenue Hours	107,109	47,802	152,746	112,729	143,407	72,147	40,757	22,711	62,085	11,529	35,389	43,011
Peak Vehicles	35	14	53	33	44	27	26	10	21	8	12	26

# Table 4-20. VVTA Performance: Peer Comparison

Source: NTD, 2012

# Chapter 4.0 – Performance Review of the Transit Agencies

THIS PAGE INTENTIONALLY LEFT BLANK

Figure 4-14 displays the peer review information for VVTA's fixed route and demand response services on cost and financial efficiency indicators:

Fixed Route:

- Operating Cost per Revenue Mile of \$3.81 was lowest cost of the group
- Operating Cost per Revenue Hour of \$65.98 was the second-lowest cost

• Annual Cost per Peak Vehicle at \$201,926 was the lowest cost of the group Demand Response:

- Operating Cost per Revenue Mile of \$4.76 was better than the median cost
- Operating Cost per Revenue Hour of \$78.87 was the second-highest cost
- Annual cost per Peak Vehicle at \$123,638 was lower cost than the median



Figure 4-14. VVTA Cost and Financial Efficiency Performance Comparison

Figure 4-15 displays the peer review information for VVTA's fixed route and demand response services on service effectiveness indicators:

Fixed Route:

- Passenger Trips per Revenue Mile of 0.95 was the second-lowest of the group
- Passenger Trips per Revenue Hour of 16.50 was better than the median
- Annual Passengers per Peak Vehicle of 50,491 was below the group median Demand Response:
  - Passenger Trips per Revenue Mile of 0.17 was the lowest of the group
  - Passenger Trips per Revenue Hour of 2.78 was the second-lowest of the group
  - Annual Passengers per Peak Vehicle of 4,363 was the lowest of the group



Figure 4-15. VVTA Service Effectiveness Performance Comparison

Source: NTD, 2012

Figure 4-16 displays the peer review information for VVTA's fixed route and demand response services on cost effectiveness indicators:

Fixed Route:

• Operating Cost per Passenger Trip of \$4.00 was better than the median

• Farebox recovery ratio of 22.8 percent was the highest of the group Demand Response:

- Operating Cost per Passenger Trip of \$28.34 was second-highest cost
- Farebox Recovery Ratio of 11.7 percent was better than the median



MAX

YSTA

0.0%

2.0% 4.0%

15.8%

20.0%

25.0%

13.5%

15.0%

#### Figure 4-16. VVTA Cost Effectiveness Performance Comparison

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

Tri Delta Transit

Visalia Transit

Source: NTD, 2012

0.0%

5.0%

10.0%

10.8%

9.9%

6.0% 8.0% 10.0% 12.0% 14.0% 16.0%

# 4.4 Summary, Conclusions, and Recommendations

This section summarizes the performance review presented in this chapter, and provides recommendations for further review and possible improvement by transit agency.

#### 4.4.1 Barstow Area Transit

As noted earlier, the performance standards which are defined in the BAT COA do not have relevance to the system that is currently in operation. As such, an analysis of performance against internal standards was not possible at the time this report was produced. However, the peer agency review findings are valid and can provide the basis for adequate comparisons.

#### Cost and Financial Efficiency

BAT generally performed well in cost and financial efficiency in comparison to its peers within San Bernardino County. BAT's operating cost per hour was the median cost for fixed route and the lowest cost for demand response services. The cost per revenue hour was the lowest for both fixed route and demand response services.

#### Service Effectiveness

BAT's service effectiveness generally was in the middle tier for fixed-route service in comparison to its peer operators, and in the lower tier for demand-response service. The number of passenger trips per mile was better than the median for fixed route service, however it was the lowest overall for demand response services. The number of passenger trips per hour was below the median for fixed route service and the lowest for demand response services.

A route segment productivity review may be advisable to ensure that the fixed-route structure, last reviewed in 2009, is still serving the most productive trip areas. The demand-response results suggest that demand-response scheduling and operating practices should also be reviewed.

#### Cost Effectiveness

As noted in Section 4.1, BAT's overall farebox recovery ratio was below standards and is being addressed through the consolidation with VVTA.

# 4.4.2 Morongo Basin Transit Authority

#### Cost and Financial Efficiency

Cost and financial efficiency standards for MBTA compared with the "Mid-Term" projections in their 2012 Comprehensive Operational Analysis were not met for either fixed route or demand response services, specifically with regards to cost per revenue mile and revenue hour. As explained earlier, an accounting change ordered by the auditors for FY 2012 increased the reported operating costs for that year, accounting for much of the increase. This, in turn, affected financial-related performance indicators for the agency's internal standards. Since MBTA's Mid-Term projections go through FY 2016 – 2017, it is likely that performance will continue to lag the established internal

standards through that year until MBTA re-baselines their projections based on the new accounting methodology.

However, MBTA generally performed well in cost and financial efficiency in comparison to its peers within San Bernardino County. MBTA's operating cost per revenue mile was the lowest amongst its peers for both fixed route and demand response services. The cost per revenue hour was at the median for fixed route service and the lowest for demand response service.

#### Service Effectiveness

Service effectiveness standards within MBTA compared with COA objectives (passengers per revenue hour) were met for fixed route service, but not for demand response services.

In the peer agency review, MBTA's service effectiveness indicators generally performed well in comparison to its peer operators. The number of passenger trips per mile was above the median for fixed route service and at the median for demand response service. The number of passenger trips per hour was second highest amongst its peers for fixed route service and the highest for demand response service.

#### **Cost Effectiveness**

Cost effectiveness standards within MBTA compared with COA objectives were not met for either fixed route or demand response services. As noted earlier, the accounting change in FY 2012 is likely the cause of the COA's projected cost effectiveness standards not being met.

However, in the peer review, MBTA performed well in comparison to other rural operators within San Bernardino County. The operating cost per passenger trip was the lowest for both fixed route and demand response services. MBTA farebox recovery ratio was the highest for fixed route service and the median for demand response service among its peers.

#### 4.4.3 Mountain Area Regional Transit Authority

#### Cost and Financial Efficiency

MARTA's cost and financial efficiency indicators (cost per revenue hour) came within 5 percent of meeting standards on three of its four fixed-route services, and met standards for demand response. As noted earlier, the CPI-based standard allowed an increase of only 2.97 percent for the two year period between FY 2011 (SRTP base year) and FY 2013 (study evaluation year), whereas MARTA's fixed-route costs per revenue hour increased 6.65 percent during this two year period. Thus, the SRTP's CPI-based standard was exceeded by actual cost increase experience, affecting the indicator. Since a wage freeze was in place during this period, it is apparent that the insurance premium and accounting changes made in FY 2012 had a significant effect on these indicators.

MARTA's performance indicator results were generally lower than its peer operators within San Bernardino County. MARTA's operating cost per revenue mile was the highest for fixed route service and the median for demand response service. The cost per revenue hour was the highest for both fixed route and demand response service. As discussed in Section 4.1, MARTA faces unique challenges in its service area due to the nature of its low-density service area, the lengthy low-density corridor connecting its two main service areas of Big Bear Valley and Crestline, periodic severe winter weather conditions and the need to use gasoline and diesel fuels rather than the more economical CNG.

#### Service Effectiveness

MARTA's internally established service effectiveness standards (passengers per revenue hour) in the most recent SRTP were met for the Big Bear Valley OTM service and nearly met for the RIM OTM service, but were not met for the other fixed route services. Service effectiveness standards were not met for demand response services. As discussed in Section 4.1, it appears that some of MARTA's service effectiveness standards as set in the SRTP may simply have been overly optimistic, given that the agency has had solid ridership increases over the two years following adoption of the SRTP. And again, service effectiveness in the MARTA service area is affected by a number of external factors such as inclement weather noted above, as well as the lengthy low-density corridor connecting its two main service areas, Big Bear Valley and Crestline.

MARTA's service effectiveness indicators were generally in the lower tier in comparison to its peers, ranking the lowest in passenger trips per mile and passenger trips per hour for both fixed route and demand response services. This is likely a result of relatively low population and employment densities, as well as unique topographic features within MARTA's service area. A recommended follow-up from this study would be for MARTA to consider a route segment and dial-a-ride service area productivity review, to ensure the service is being provided in the most productive areas, given the overall low-density nature of the service area.

#### Cost Effectiveness

MARTA's internally established cost effectiveness standards (farebox recovery ratio) were met for the Big Bear Valley OTM service and nearly met for the Big Bear fixed-route service, but were not met for other fixed route services. Cost effectiveness standards were not met for demand response services. It should be noted that for fixed-route services overall, MARTA's farebox recovery ratio improved from 14.6 percent in FY 2011 to 16.7 percent in FY 2012, and declined only slightly to 16.5 percent in FY2013. Thus, as with the service effectiveness goals, the SRTP's projected standards may have been overly optimistic. Also, as noted earlier, the changes in calculation of insurance premiums and the change in accounting practices for accrued vacation and sick leave mandated by the auditors beginning in FY 2012 contributed to a 7.15 percent increase in operating cost per revenue hour, despite an on-going wage and benefit freeze through the end of FY2013. As a result, the performance indicators with a financial component were impacted by factors beyond MARTA's control.

In the peer review, MARTA's operating cost per passenger trip was the highest amongst its peers for both fixed route and demand response services. However, MARTA's farebox recovery ratio was the median percentage for fixed route service and was the highest recovery ratio for demand response services.

#### 4.4.4 City of Needles

#### Cost and Financial Efficiency

The City of Needles' proposed cost and financial efficiency standards from the *Draft Needles Transit Services SRTP 2014-2018* were met for both fixed route and demand response services.

#### Service Effectiveness

The City of Needles' draft service effectiveness standard for fixed route service was met and its standard for demand response service was nearly met. The City of Needles' passenger trips per mile and passenger trips per hour both ranked second highest for fixed route service amongst its peers.

#### Cost Effectiveness

The City of Needles' draft cost effectiveness standards (farebox recovery ratio) were met for both fixed route and demand response services.

#### 4.4.5 Omnitrans

#### Cost and Financial Efficiency

Omnitrans' internally established cost and financial efficiency standards were met for its directly-operated fixed route service. Standards were not met for its purchased fixed route service or its demand response service.

In the peer agency review, Omnitrans' operating cost per revenue mile was below the median for fixed route and demand response services in comparison to its peers. The cost per revenue hour was below the median for fixed route service and above the median for demand response service. Omnitrans' annual operating cost per peak vehicle was second highest for fixed route service, which can be attributed to Omnitrans' flat demand profile by time of day (rather than a more traditional bi-modal a.m./p.m. peak mode), which requires the Omnitrans fleet to run throughout the day (low peak-to-base ratio). Additonally, Omnitrans' annual operating cost per peak vehicle was the highest amongst its peers for demand response service.

The operating cost per peak vehicle bears further investigation to determine root causes. It is noted that Omnitrans had the highest miles operated per peak vehicle per year among the peer agencies, possibly indicating a low peak to base service ratio and long hours of service for each bus. This could also be a reflection of the nature of Omnitrans' lower density service area compared to its peers. Omnitrans had the third highest average operating speed among its peers, at 12.9 miles per hour. The peers ranged from 10.9 to 14.3 miles per hour. The higher average operating speed results in more

vehicle-related mileage per revenue hour, driving up operating cost per hour and per peak vehicle.

#### Service Effectiveness

Omnitrans' internally established service effectiveness standards were nearly met for the directly operated fixed-route service but were not met for purchased fixed route services. Two of the three standards for service effectiveness were met for demand response service, and one was nearly met.

As noted in Section 4.1, Omnitrans should closely monitor the service effectiveness of the "*OmniGo*" service after the overlapping OmniLink demand-response service is eliminated in September 2014. Though it is more productive than the *OmniLink* service, the *OmniGo* service, at 5.25 passengers per revenue hour, was among the lowest-performing fixed-route service in terms of productivity of any fixed-route service in San Bernardino County, including rural services.

In terms of the peer agency review, Omnitrans compares favorably in terms of passenger trips per mile for both fixed route (directly-operated and purchased) and demand response services. The number of passenger trips per hour was second highest amongst its peers for both fixed route and demand response services. The number of annual passengers per peak vehicle was second highest for fixed route service and the highest amongst its peers for demand response service.

#### Cost Effectiveness

Omnitrans' internally established cost effectiveness standards were met for its directly operated fixed route service. Standards were not met for its purchased fixed route service or its demand response service.

Omnitrans' operating cost per passenger trip was lower than the median cost for both fixed route and demand response services. Omnitrans farebox recovery ratio was above the median for fixed route service and second highest for demand response service.

## 4.4.6 Victor Valley Transit Authority

#### Cost and Financial Efficiency

VVTA's internally established cost and financial efficiency standards from its 2013 COA were met for its County fixed route service. One of two standards were met for both the Lifeline (B-V Link) and Commuter (NTC Commuter) service. Standards were not met for local and circulator/deviated fixed route services, as well as for demand response service.

VVTA's operating cost per revenue mile was the lowest amongst its peers for fixed route service and lower than the median for demand response services. The cost per revenue hour was second lowest for fixed route service but second highest for demand response service. As noted in Section 4.1, VVTA may want to investigate the cost factors which lead to the cost per hour for demand-response service being significantly higher than its

cost per hour for fixed-route service, given that both are operated by the same contractor. The demand-response cost per revenue hour was the second highest among all San Bernardino County demand-response services, and second highest among its peers.

#### Service Effectiveness

VVTA's internally established service effectiveness standards were met for all of its fixed route and demand response services.

In the peer agency review, VVTA's passenger trips per mile was second lowest for fixed route service and the lowest for demand response service. The number of passenger trips per hour was above the median for both fixed route service and second lowest for demand response services. The number of annual passengers per peak vehicle was below the median for fixed route service and the lowest amongst its peers for demand response service. Taken together, these findings for fixed-route service seem to indicate that VVTA is required to cover a lot of miles to serve their passengers, relative to peer agencies, a reflection of the nature of VVTA's low-density service area. This is further borne out by the fact that, within the peer group, VVTA is tied with Merced County's "The Bus" for highest average system operating speed, at 17.3 miles per hour. The other peers ranged between 11.6 and 14.2 miles per hour. Given the nature of the service area, VVTA's fixed-route service productivity on a per-revenue-hour basis compares favorably with its peers.

#### Cost Effectiveness

VVTA's internally established cost effectiveness standards were met for its circulator/deviated, county, and lifeline (B-V Link) fixed route services. One of two standards were met for both the local and Commuter (NTC Commuter) fixed route services. Standards were met for demand response service.

In the peer agency review, VVTA's operating cost per passenger trip was better than the median for fixed route service but was the second highest cost for demand response service, another possible indication of the relative difference in operating costs per hour between VVTA's fixed-route and demand response services. VVTA farebox recovery ratio was the highest among its peers for fixed route service and better than the median for demand response service.

# THIS PAGE INTENTIONALLY LEFT BLANK

# 5.0 FINANCIAL REVIEW

This chapter conducts a financial review and analysis of strategies to increase efficiencies or improve services for transportation providers and agencies in San Bernardino County. As presented in Chapters 3.0 and 4.0 of this study, a variety of potential cost efficiency and service coordination measures have been identified. On September 9, 2014, a transit agency workshop was conducted where all the potential strategies were reviewed, and each agency identified levels of support for each strategy.

The resulting strategies with significant support are shown in Table 2-1. The strategies have been divided into three categories, as follows:

- High-level potential cost saving items
- Low- to mid-level potential cost saving items
- Items not likely to reduce costs but which could improve services or revenues

# 5.1 Methodology

Several approaches were utilized to conduct the financial review. First, a data request spreadsheet was developed, customized for each agency based on the strategies each agency supported, and sent out. The spreadsheet requested detailed cost, and in some cases, quantity data on the activities, equipment and materials the agencies have indicated an interest in streamlining or coordinating on. This data was used to estimate the financial impact of these functions both in aggregate throughout the County as well as by each agency and for each of these functions of interest. The spreadsheet seeks detail as to how much of their budgets they are spending for these services, equipment and materials, to the extent feasible.

Second, we analyzed the data for areas of overlap or those items where group or standardized purchases may afford some economies of scale or efficiencies, whether employed collectively among the agencies in the county or where some of the agencies might take advantage of statewide purchase schedules or consortia. The data collected enabled the study team to quantify the estimated financial benefits of any recommendations.

Third, our team examined areas where resources could be utilized more productively through resource sharing arrangements, or adoption of industry best practices might provide some resource savings. For example, there may be an opportunity to certify Americans with Disabilities Act (ADA) complementary paratransit clients on a regional basis using standardized procedures which could help reduce ADA paratransit demand and service costs.

Category/Strategy	SANBAG	Omintrans	VVTA	МВТА	МТ	Needles	VTrans	Initial Methodology to Evaluate/ Obtain Data		
		I	High Potenti	al Cost Savi	ngsltems					
Bus Procurement		х	Х	х	Х	Х	Х	Data Request Spreadsheet		
ADA Certification Process	x	х	Х		Х		Х	Data Request Spreadsheet		
ADA Use of Taxis for certain trips		х	Х		х		Х	Interviews		
ADA Service Utilization		Х						Interviews with Omnitrans		
Heavy Overhaul/Repair		Х	Х	Х	Х		Х	Data Request Spreadsheet		
Bus Parts Procurement		Х	Х	Х			Х	Data Request Spreadsheet		
Automotive Parts Procurement		Х	Х	Х			Х	Data Request Spreadsheet		
Tire Contracts		х	Х		Х			Data Request Spreadsheet		
CNG Fuel Procurement		Х	Х	Х				Data Request Spreadsheet		
CNG Conversion at Omnitrans		Х						Interviews with Omnitrans		
CNG Station Maintenance		Х	Х	Х				Data Request Spreadsheet		
Low to Mid-Level Potential Savings Items										
Regional Cust. Tel. Info Center		х	Х	Х	х		х	Data Request Spreadsheet		
Project Development / Construct. Mgmt.	/ x	х	х	х	х	х	х	Develop an MOU template		
Regional Marketing	х	х	Х	Х	Х	Х	Х	Data Request Spreadsheet		
Mutual Aid Agreements		х	Х		х			Develop an MOU template that would be customized		
	Items	not likely to r	educe cost l	but could imp	prove servic	es or reven	ues			
Inter-Agency transfer agreements		х	х	х	х			Develop an MOU template that would be customized		
Service Planning/ Data Analysis Assistance	×	х	х	х	х	х		Data Request Spreadsheet		
Grant Application Assistance (Non- competitive)	x	х	Х	х	х	Х	х	Data Request Spreadsheet		
Civil Rights Compliance Assist.		х	Х	Х			х	Data Request Spreadsheet		
Training/ Staff Development		х	Х	х	х	Х	х	Data Request Spreadsheet		

Fourth, some of the strategies discussed at the workshop may not have large financial savings but could improve service to the public, including a possible regional marketing effort, centralized on-line customer information and/or call center, interagency transfer agreements, and mutual aid agreements. These items were qualitatively evaluated based on comparable efforts in other jurisdictions. Follow-up questions were sent to the agencies as needed to collect additional information on these areas.

Finally, in addition to the spreadsheet data request, analysis, and follow-up questions, there were some special-case cost savings strategies specific to Omnitrans that were explored, including:

- Potential savings from converting one of the Omnitrans yards from delivered liquefied natural gas (LNG) to pipeline compressed natural gas (CNG) for their buses.
- Consideration of in-person assessments for at least some of the ADA certifications.
- Review of ADA Paratransit vehicle scheduling vs. passenger demand (by hour of the day) to see if there were some economies to be had.

Table 5-2 summarizes the estimated cost savings for the high-level potential cost saving strategies. Cost savings could not be estimated for the low- to mid-level potential cost saving strategies or the service improvement strategies. Also, some strategies have multiple scenarios, as shown in Table 5-2, so the table totals are not additive without selecting one scenario vs. another.

Category/Strategy	SANBAG	Omintrans	VVTA	MBTA	МТ	Needles	VTrans	4-Year Strategy Total
Bus Procurement		\$3,900,000	\$649,000	\$246,850	\$148,622	\$30,000	\$10,000	\$4,984,472
ADA Certification Process		\$842,724	N/A		\$1,904			\$844,628
ADA Use of Taxis for certain trips using current ADA Fares - Scenario 1		\$ (308,748)	\$131,045		\$76,977			\$ (100,726)
ADA Use of Taxis for certain trips with 50% Taxi Voucher Program - Scenario 2		\$1,090,553	\$787,265		\$165,002			\$2,042,820
Bus Heavy Overhaul/ Repair		\$203,400	\$19,000	\$6,500	\$3,910			\$232,810
Bus Parts Procurement		\$1,296,000	\$333,600					\$1,629,600
Automotive Parts Procurement	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Tire Contracts		\$81,080	\$24,816		\$10,604			\$116,500
CNG Fuel Procurement - Scenario 1		\$-	\$97,919	N/A				\$97,919
CNG Fuel Procurement - Scenario 2		\$439,132	\$324,576	N/A				\$763,708
CNG Fuel Procurement - Scenario 3		\$764,984	\$527,377	\$38,046				\$1,330,407
CNG Conversion at Omnitrans - Scenario 1		\$354,400						\$354,400
CNG Conversion at Omnitrans - Scenario 2		\$567,040						\$567,040
CNG Conversion at Omnitrans - Scenario 3		\$1,807,440						\$1,807,440
CNG Station Maintenance	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Notes: Boxes left blar were not available or	nk indicate age the strategy do	ncies that chose bes not entail co	e not to particip st savings.	pate in the strate	egy for further s	tudy. Boxes m	arked N/A indic	ate data that

Table 5-2	4-Year Cost Savings.	High-Level Potential	Cost Saving	Strategies
	+ rour ooot ournigo;	Ingli Lovol i otoritiar	ooot ouving	onucgico

# 5.2 Strategy Evaluations

This section evaluates strategies within three categories: high-level potential cost saving items; low- to mid-level potential cost saving items; and items not likely to reduce costs but which could improve services or revenues.

Each strategy is summarized and evaluated, and includes the following:

- Strategy description
- Specific data elements reviewed/analyzed
- Other considerations/factors which may apply, where indicated
- Analysis results, including increased or decreased county-wide costs, staffing impacts, operational impacts, policy impacts, a qualitative assessment (where deemed appropriate), and conclusion/recommendation

#### 5.2.1 High-Level Potential Cost Saving Items

Each of the areas identified for high-level potential cost savings were those selected by the agencies for evaluation, as well as areas for significant savings identified by the consultant team based on its industry experience.

#### **5.2.1.1** Bus Procurements

Bus procurements comprise a significant percentage of any transit agency's capital budget. In addition, bus procurement contracts typically contain provisions for parts, training, and other field support to be provided by the bus contractor. Thus, strategies for improving bus procurements can also affect other areas identified by participating agencies for savings in this study.

#### Strategy Approach

Initially, bus procurement data was collected from six participating agencies through a survey. Data were then aggregated over a 4-year period, including the costs incurred by each participating agency in the current budget year as well as those budgeted for the following 3 years. Savings were then analyzed based on industry experience for volume purchases and projected both for each agency as well as expected combined savings for agencies interested in a joint bus procurement strategy, as shown in Table 5-3.

#### Analysis

While the industry literature on expected savings is mixed (Center for Urban Transportation Research, 2013; Federal Transit Administration [FTA], 2010; Jacksonville Transportation Authority, 2013), it is assumed that such group purchases typically reduce each participating agency's procurement costs by roughly 10 percent. This is achieved not only through specification of common components and model platform but also through the time value of the procurement process itself, which can result in a year or more time savings compared with a process by which each agency conducted its own procurements.

	Total	Omnitrans	VVTA	MBTA	МТ	Needles	VTrans
Total 4-Year							
Projected	\$20,600,000	¢22 600 000	¢e 000 000	¢O	0.2	¢0	0.9
Procurement Value -	\$39,000,000	\$33,000,000	\$0,000,000	φU	φU	φU	φU
Full size buses							
Total 4-Year							
Projected	¢10.244.710	\$5 400 000	\$400.000	¢2 /68 50/	¢1 /96 215	¢200.000	\$100,000
Procurement Value -	\$10,244,719	φ3,400,000	\$490,000	φ2,400,304	φ1,400,213	φ300,000	\$100,000
Cutaways							
Expected savings -							
Assumes 10%	\$4,984,472	\$3,900,000	\$649,000	\$246,850	\$148,622	\$30,000	\$10,000
Savings							

Table 5-3.	4-Year Joint Bus Procurement Costs and Savings,
Co	mpared to Individual Agency Procurement

However, this average assumes savings over traditional procurement practices. Because all of the agencies are currently involved with group purchasing arrangements (typically the CalACT/Morongo Basin Transit Authority [MBTA] schedule), the savings achieved in any new county-wide group purchase will likely be less than those provided in the CalACT schedule. Omnitrans conducts joint procurements for full-size buses in conjuction with other transit agencies, including a recent five-year contract procurement Omnitrans led with seven other agencies for 40-foot buses awarded in May, 2015. VVTA buys off the CalACT bids and also separately participated in a joint procurement with six other agencies for over-the-road coaches for the NTC commuter service. Thus, the figures presented in Table 5-3 are probably already being achieved by the San Bernardino County transit agencies through their current joint bus procurements.

#### Conclusion

It is important to note that joint bus procurements typically allow for each participating agency to specify its own seats, flooring, paint livery and other non-structural items, and in some cases their own engines and transmissions. However, the additional individual items ordered by each agency increase the expected procurement complexity and time discounts are reduced. Thus, the technical options allowed in the contract and solicitation documents must be tightly controlled.

Typically, a group purchase is led by one of the larger participating agencies, due to the staff required for conducting such procurement. For example, Sacramento Regional Transit District will conduct a bus procurement solicitation for nearby agencies.

Another method often pursued by many public transportation agencies in the U.S. is a statewide purchase schedule. Examples include Minnesota and Florida. In addition, federal legislation has been proposed to allow public transportation agencies to procure buses from the General Services Administration's Buses Ready-to-Buy schedule.

However, one statewide schedule available to the county's interested agencies is that operated by CalACT/MBTA, which offers member agencies a variety of buses, particularly smaller vehicles of the type commonly used in paratransit service and on

rural and suburban routes. All of the San Bernardino County transit operators already participate in this schedule for cutaway buses, and since the vast majority of the vehicles ordered by interested agencies herein are for these types of vehicles, the CaIACT schedule provides an excellent on-going cost savings opportunity.

# 5.2.1.2 ADA Certification Process

ADA complementary paratransit service comprises a significant percentage of some of the San Bernardino County transit operators. Omnitrans, which spent \$12.45 million on ADA partransit service in fiscal year (FY) 2013, has noted that the rapid rise of Access service costs is a major concern for the long-term financial plans of the agency and is seeking strategies to contain those costs. One strategy being pursued by Omnitrans is to strengthen the ADA passenger certification process so that only those who truly qualify for ADA service receive certifications to use it (Omnitrans, 2014b).

#### Strategy Approach

Omnitrans, working with Valley Transportation Services (VTrans), recently conducted a site visit at Utah Transit Authority, which is using in-person functional assessments of ADA applicants to ensure they are qualified to receive the service. These can be quite costly due to the time and level of expertise required to conduct the assessment. Based on the site visit, Omnitrans has decided to try a staged approach to improve their certification process, and will utilize "In Person Interviews" for each applicant rather than allowing applicants to submit application materials for review and approval.

Such In-Person Interviews would include meeting with the applicant at an Omnitrans office and review of all paperwork, and would help ensure that applicants will receive careful review before being certified. Omnitrans included this change in ADA certification process as part of the public hearings conducted in February 2015, and implementation occurred effective September 1, 2015. Depending on how these In-Person Interviews develop, Omnitrans could move toward full functional assessments in the future. Certifications are currently updated every 3 years<sup>6</sup>.

#### Alternative Strategy

Another approach to improve or standardize certification approaches would be to use a third party contractor to review and approve applications. Victor Valley Transit Authority (VVTA) currently uses ADARide for these services. ADARide is an on-line ADA Certification vendor. Applicants complete an on-line application form and submit a healthcare form. These materials are screened by ADARide eligibility workers who render a decision on the certification.

It should be noted that the ADARide process is not an in-person assessment. Per the "Frequently Asked Questions" page on ADARide's website,

<sup>&</sup>lt;sup>6</sup> This information was obtained from a follow-up interview conducted with Omnitrans' staff on December 10, 2014.

# DOESN'T SOMEONE NEED TO HAVE AN IN-PERSON INTERVIEW TO ACCURATELY DETERMINE ABILITIES?

The FTA Regulations only indicate an in-person assessment at the appeals level. Most other disability entitlement programs are decided using a paper application with professional verification. With a complete application and an appropriate healthcare participation, an accurate and functionally based eligibility decision can be made. If someone has difficulty finding a professional to document their abilities, then the person may have the option of being evaluated in person.

ADARide's website also states that their average cost per certification evaluation is \$70.00. The site states the average cost for in-person assessments done by other organizations is \$150.00 (ADARide, 2014).

In order to draw a comparison between the current Omnitrans certification rates and the services provided by ADARide, FY2014 certification data for Omnitrans and VVTA, who uses ADARide, were obtained, with the results summarized in Table 5-4. It should be noted that many factors can affect ADA certification rates, including demographic factors in each agency's service area and availability of alternative transportation programs. However, a general comparison of the programs is useful to identify any major differences in certification rates and potential opportunities for savings.

ADA Certification Rates	Total Applications	Total Unrestricted Certifications	Total Conditional/ Trip-by-Trip	Total Temporary	Total Ineligible
Omnitrans	4,288	2,308	724	1,151	105
Omnitrans (%)	100%	54%	17%	27%	2%
VVTA	993	650	194	123	26
VVTA (%)	100%	65%	20%	12%	3%

# Table 5-4. Comparison of Certification Rates with Omnitrans' Paper-Based ADA Certification Program and VVTA's ADARide Program

As shown in Table 5-4, the Omnitrans program had a lower percentage of applicants who received unrestricted certifications but a similar percentage who received conditional/trip-by-trip certifications. Conditional and trip-by-trip certifications can save the agency operating costs if the operator properly administers the restrictions. The combined unrestricted and conditional/ trip-by-trip certifications totaled 71 percent for Omnitrans and 85 percent for VVTA/ADARide. Omnitrans issued a higher percentage of temporary certifications (27 percent) than VVTA/ADARide (12 percent). The percentage of applicants found ineligible was only two percent at Omnitrans and only three percent at VVTA, indicating that the vast majority of applicants receive some type of certification under either program. Thus, use of ADARide does not appear to result in significantly lower certification rates, at least in this comparison.

The study team also evaluated whether the cost of the certification process itself might result in a savings under one method or the other.

Table 5-5 provides a comparative estimate of the cost per applicant to process certifications at Omnitrans, using their current methods, and at VVTA, where ADARide performs the certifications.

Table 5-5.	Comparison of	Certification	Costs per	Applicant u	nder Omnitran	s' Paper-
Base	ed ADA Certifica	tion Program	and VVTA	's ADARide	Program, FY2	014

Estimated ADA Certification Process Costs*	Total Costs		Total Applications	Cost per Application			
Omnitrans	\$	116,480	4,288	\$	27.16		
νντα	\$	85,250	993	\$	85.85		
*Omnitrans cost assumes 2 FTE @ \$20.00/hour with 40% benefit load							
VVTA cost based on FY2014	Actua	I Costs based	on VVTA's Data Red	quest f	form		

Costs for Omnitrans staff performing this function are based on the hours estimate provided in the agency's data request form, which totaled 2.0 full-time equivalent (FTE), and an assumed pay rate of \$20.00 per hour and a fringe benefit rate of 40 percent. VVTA's certification cost was reported as \$85,250 in FY2014, based on their Data Request form.

As shown in Table 5-5, based on the above assumptions, Omnitrans' current certification costs were approximately \$27.00 per applicant, compared to VVTA's contracted cost of \$85.85 per applicant. It should be noted that Omnitrans has over four times the volume of applicants, making the direct staffing of this function more practical than it may be for VVTA. Omnitrans recertifies every three years; VVTA recertifies every five years. Also, it is possible that Omnitrans' cost per applicant may increase under the new "in-person interview;" however, it is hoped that better screening under that system will eliminate applicants who may not be eligible but are receiving certifications now, thus saving the agency significant operating cost in the long run.

#### Analysis

In order to determine the potential cost savings from improved ADA certification processes, the total number of ADA applications in FY2014 was obtained from the data request sent to the interested agencies: Omnitrans, VVTA, and Mountain Area Regional Transit Authority (MARTA). Potential savings were estimated using the following assumptions:

It was assumed that an additional two percent of FY2014 applications would be found ineligible as a result of improved screening processes in the Omnitrans and MARTA programs. No change in certification rates was assumed for VVTA's ADARide certification program since that program operates somewhat independently from the agency using its own procedures for all client agencies.

It was assumed that the average ADA passenger would have utilized ADA paratransit service eight times a month (roughly one round trip per week), with the agency incurring its average ADA passenger cost per trip.

The results of this analysis are displayed in Table 5-6. As can be seen, annual savings from even a minor reduction in application approvals can yield significant potential savings at Omnitrans. Given the small volume of ADA Certifications at MARTA, a change in certification procedures may not be warranted there. Table 5-6 also provides projected 4-year savings to be consistent with data provided for the other strategies.

# Table 5-6. ADA Paratransit Operating Costs, Certification Applicants, and Potential Savings from Improved Certification Processes

	Omnitrans	VVTA	МТ	Annual Total	4-Year Total				
Total Annual ADA	otal Annual ADA								
Paratransit	\$12,569,094	\$3,599,529	\$644,549	\$16,813,172	\$67,252,688				
Expense, FY2013*									
# Applicants in	1 288	NI/A	6	_					
FY2014	4,288 IN/A 6 -								
Paratransit Cost	Paratransit Cost								
per Passenger,	Passenger, \$25.59 \$28.54 \$41.30 -								
FY2013*									
Potential	otential \$210,681 N/A \$476 \$211,157 \$844,620								
Savings** \$									
*Source: TransTrack data									
**Potential annual savings assumes an additional 2% reduction in certifications, and that each certified									
rider uses the system 8 times per month, at system's FY2013 operating cost per passenger. No savings									

assumed for VVTA's ADARide program

# 5.2.1.3 ADA Use of Taxis for Certain Trips

This strategy investigates opportunities for cost savings through substituting taxi service for certain ADA paratransit trips.

## Strategy Approach

Review interested transit agencies' responses to questionnaire, performance and operating costs from Task 1.3 Transit Agency Performance Review and the 2012 National Transit Database statistics. Determine if there are taxi providers in each service area that service could shift to, as well as multi-agency coordination opportunities. Compare fully burdened cost of a comparable taxi service, to current inhouse costs, and determine if there can be improved efficiencies, quality and/or reduction in costs if transitioned from in house to a taxi provider.

Omnitrans provides ADA demand response service branded as "Access", which is contracted through their contractor, First Transit. Customer reservations are taken by and booked by Omnitrans' contractor, in advance from one to seven days, and are packaged into runs or daily itineraries, and then assigned and provided to drivers daily. Access service is subject to strong morning and afternoon peaks, driven largely by the number of workshop programs conducted by social service agencies (SSA) in the

service area. Omnitrans has been challenged to adjust the past Contractor's staffing to reduce the service level in the lower-demand period in mid-day. However, Omnitrans recently re-solicited the paratransit contract and the new contractor, MV Transportation, will utilize taxi services to handle unproductive trips such as late night and weekend service.

VVTA paratransit service is contracted to Transdev (formerly Veolia), who takes the trip request calls, schedules the trips into Trapeze which then creates assignments for Transdev vehicles/drivers. The contract is reimbursed on a fixed rate per revenue hour basis.

MARTA operates their Dial-A-Ride (DAR) service directly, takes the trip request call, creates daily trip itineraries through dispatch, and then assigns to MARTA drivers.

VTrans stated they are available to conduct a role as a provider and/or coordinator. Although not a direct operator of paratransit or ADA service, in early 2015 VTrans launched a taxi voucher in the San Bernardino Valley for Seniors, low income and persons with disabilities. The program is patterned after voucher programs in the San Francisco and Palm Springs area. The VTrans program is funded through the FTA Job Access Reverse Commute funding program (25 percent), the FTA New Freedom (25 percent) and Measure I Valley CTSA funding (50 percent). Each participant must prequalify with VTrans, and eligible trips include interview/work related trips, medical trips, and trips for other life sustaining and enriching activities.

Upon approval, the participant is provided a reloadable debit card/ID where VTrans provides a 50 percent match to the <u>participant's contribution amount loaded onto the</u> <u>card</u> (not to exceed \$40 in a VTrans contribution per month). The ID/debit card is a closed loop reloadable debit card, only compliant with the three cab companies under contract to VTrans and through an in-cab billing system called Cabconnect. Once approved for the program and with debit card in hand, the rider contacts one of the taxi providers and schedules the trip. When the debit card is "swiped" in the taxi, the entire taxi trip's cost is paid, half by the voucher funds on the card and half by the passenger's loaded contribution on the card. Cabconnect can provide to VTrans real time tracking and reporting of origin and destination, trip amount, driver, etc.

#### Analysis

Table 5-7 presents an analysis of current paratransit and ADA trip performance by the three interested transit providers.

Agency	Passenger Boardings	ADA / Paratransti Fleet	Co R	ost Per ev Hr	P Tr	Passenger ip Per Rev Hr	Op P	perating Cost er Pass Trip	Farebox Recovery Ratio	Ave. Pass Mile Per Trip*
Omnitrans	491,179	96	\$	68.98	\$	2.70	\$	25.59	12.6%	10.26
VVTA	126,444	27	\$	80.28	\$	2.81	\$	28.54	11.6%	11.85
MT	15,607	4	\$	85.95	\$	2.08	\$	41.30	7.1%	N/A

	Table 5-7.	Current Interested	Transit Agency	Paratransit	<b>Program Performance</b>
--	------------	--------------------	----------------	-------------	----------------------------

\*Source: Based on 2012 NTD Reports computed by taking Total Annual Passenger Miles / Total Annual Unlinked Trips All other information gathered from Task 1.3 Transit Agency Performance Review

Table 5-8 below compares the current operating costs with the costs of a taxi-provided service, if the transit agencies were to issue an RFP for taxi providers, <u>and assumes</u> <u>only the ADA Paratransit fare is levied on the rider</u>. This service assumes current taxi-provider trip rates and does not assume any trips are shared. An estimated 5 percent of current trips were assumed possible to shift to taxis from the current ADA paratransit service. Transit operators would continue to take call requests and determine which trip would be dispatched to a taxi provider; however, there would be an increase in staff support to manage, monitor and resolve issues between the rider and taxi providers. On a per passenger trip basis, Omnitrans and VVTA's per passenger operating costs are comparable to the cost of single occupant taxi trip for similar distance rides and as a result this approach was more expensive for Omnitrans and produced only a small savings for VVTA. However, MARTA could realize a savings by transitioning current DAR trips away from their existing service.

 Table 5-8. Analysis of Directly Contracted/Reimbursed Taxi Cost –

 Rider Pays Current ADA Fare

Agency	0	mnitrans	VVTA	МТ	Comments
5% of all Current Agency					
Trips		24,559	12,644	1,561	Example of trips that may be provided by taxi's
Agency Costs for 5% of					Current transit agency cost of the 5% of all trips, on per trip
Agency Trips	\$	628,464	\$ 360,871	\$ 64,457	basis
Taxi Cost Per Trip - 5 miles	\$	15.00	\$ 14.00	\$ 17.75	Cost per trip based on mileage and provided by taxi providers
Taxi Cost Per Trip -10 miles	\$	28.00	\$ 25.00	\$ 32.50	Cost per trip based on mileage and provided by taxi providers
Total Taxi Costs - 5% of all					
Trips	\$	687,651	\$ 316,110	\$ 39,213	Assume 10 mile trip for Omni/VVTA, 7.5 mile trip MT
Est. Staff Oversight of Taxi					.15 FTE for Omnitrans Staff; .10 FTE for VVTA; .05 FTE for
Program	\$	18,000	\$ 12,000	\$ 6,000	MT, based on \$120 an hour fully burdened staff rate
Total Taxi Costs	\$	705,651	\$ 328,110	\$ 45,213	
Annual Savings or (Deficit)	\$	(77,187)	\$ 32,761	\$ 19,244	
% of Savings Gain / -Loss		-12%	9%	30%	
4-Year Savings Gain / -Loss	\$	(308,748)	\$ 131,045	\$ 76,977	

If, alternatively, the transit operators choose to implement a taxi voucher program structured in a similar manner to the San Francisco, Palm Springs and VTrans programs, the cost-benefit immediately increases since the passenger pays for 50 percent of the taxi fare, with the other 50 percent being paid for by the taxi voucher (potentially covered by federal funding programs or Measure I monies). This service assumes that the current users are willing to pay a higher fare than regular ADA paratransit service in order to receive door-to-door taxi service. This analysis does not take into account that the transit operator may realize a cost savings from a 5 percent
reduction for call taking and dispatching; but does assume a modest addition for staff to manage the program and providers. Given the same trip use and assumptions as the scenario above, Table 5-9 analyzes such a program and the savings for each operator to divert five percent of their current paratransit trips. As can be seen, under a Taxi Voucher Program, there are potentially significant cost savings for the transit agencies for the trips diverted to cabs in the program, totaling an estimated \$510,705 per year for the three interested agencies combined.

Agency	0	mnitrans	VVTA	МТ	Comments
5% of all Current Agency					Example of trips that may be provided by a taxi voucher
Trips		24,559	12,644	1,561	program
Agency Costs for 5% of					Current transit agency cost of the 5% of all trips, of per trip
Agency Trips		628,464	360,871	64,457	basis
Taxi Cost Per Trip - 5 miles	\$	15.00	\$ 14.00	\$ 17.75	Cost of a curent taxi trip by area, based on average miles
Taxi Cost Per Trip -10 miles	\$	28.00	\$ 25.00	\$ 32.50	Cost of a curent taxi trip by area, based on average miles
Total Taxi Costs - 5% of all					
Trips	\$	687,651	\$ 316,110	\$ 39,213	Assume 10 mile trip for Omni/VVTA, 7.5 mile trip MT
Agency Cost Share of Taxi					
Trips after Voucher	\$	343,825	\$ 158,055	\$ 19,606	Agency shares 50% of Taxi Trip Costs
Staff Oversight	\$	12,000	\$ 6,000	\$ 3,600	10% of Omnitrans Staff; 5% for VVTA; 3% for MT
Total Taxi Voucher Costs	\$	355,825	\$ 164,055	\$ 23,206	Agency Share of Taxi Trips + Staff Oversight
Annual Savings or (Deficit)	\$	272,638	\$ 196,816	\$ 41,251	Current Cost Per Pass - Total Taxi Voucher Costs
% of Savings Gain / -Loss		43%	55%	64%	
4-Year Savings Gain / -Loss	\$	1,090,553	\$ 787,265	\$ 165,002	

Table 5-9. Analysis of Taxi Voucher Program - 50 percent Farebox Return

#### Conclusion

MARTA has not pursued a complementary taxi service, as there is only one taxi provider in the Big Bear Valley area and there are no taxi providers in the Crestline/Lake Arrowhead area.

Even though the study team found more than a dozen taxi providers in the greater Victor Valley area, VVTA has not pursued a taxi program due to the lack of control when turning service over to taxi companies, the perceived poor quality of local taxi services and lack of adequate taxi coverage given VVTA's large service area (425 square miles). In further research it appears that the majority of the taxi providers in the greater Victor Valley appear to be small "mom and pop" taxi companies with a "fleet" of one vehicle, and it is questionable as to whether or not they would be able to comply with transit agencies' strict insurance, monitoring, reporting and compliance requirements.

Omnitrans had not pursued a taxi alternative in the past due to the limited number of taxi resources in the region, as well as the structure of the existing contract with their paratransit provider, First Transit, according to information provided in their Agency Questionnaire (SANBAG, 2014a). However, on June 3, 2015, Omnitrans awarded the new contract for ADA paratransit services to MV Transportation, and the scope of the contract includes improved efficiencies such as the use of taxis for certain trips.

Assuming that the transit providers may utilize existing funding to fund their 50 percent share of a taxi voucher program, and given that the voucher approach could result in cost savings where taxi resources are adequate, it is recommended that Omnitrans continue to pursue such a program in concert with VTrans. Additional steps to take may involve surveying current riders to ascertain their interest and willingness to pay a higher fare for such service to gain a better understanding of the potential market facilitating a reduction in current ADA paratransit service levels, and considering release of an RFP for provider(s). An ideal scenario may be if the voucher program potential market could result in reducing demand during peak periods, or is utilized to replace late night/early morning trips. If so, then the cost-benefit of a voucher program would only increase and result in improved productivity for the remaining paratransit/ADA program. It should be noted that ADA-certified passengers would be offered the taxi voucher program as an option, since, under the law, they are entitled to ADA paratransit service comparable to fixed route service hours at not more than twice the fixed-route fare.

As noted above, Omnitrans recently awarded a new contract for Access service. The contract includes language encouraging use of taxi's for late-evening and/or low-demand periods to reduce operating costs. Please see further discussion on this topic in the next strategy discussion.

#### 5.2.1.4 ADA Service Utilization Analysis

This strategy was originally intended to conduct an ADA service utilization analysis for Omnitrans Access service to see if a mis-match between service demand and service supply might be an opportunity for savings if addressed. However, since the study team learned that Omnitrans is going out to bid for a new ADA service provider in the next few months with the current contract expiring in August 2015, the focus of this strategy became identifying potential RFP elements that could contribute to savings in the future.

#### Strategy Approach

Frequently, rider demand for ADA paratransit service tends to be highly peaked. Many of the social service agency programs attended by clients who use ADA paratransit service tend to have start times around 8:00 a.m. to 9:00 a.m., and end times around 3:00 p.m. to 4:00 p.m. As a result, ADA paratransit service providers must operate their peak resources during these periods, with lower demand often experienced in the middle of the day. If the ADA paratransit provider does not withdraw some of its resources from service during this mid-day period, passenger productivity declines and operating cost per passenger in these periods increases.

In a meeting with Omnitrans staff on December 10, 2014, staff concurred that the Access system does experience peaks as described above and that the contractor has been challenged to address the mid-day lull in demand in a productive manner. Thus, there may be an opportunity for potential savings in the next ADA Paratransit Service contract.

Among the strategies for addressing this productivity issue, discussed with Omnitrans staff, are the following:

- Include minimum passenger productivity requirements or goals in the next Request for Proposals.
- Include specific language requiring split shifts for paratransit operators or use of other strategies to reduce resource costs in the middle of the day during the lull in demand.
- Consider the possibility of reimbursement to the contractor on a per-passenger carried basis instead of the current fixed-overhead/variable cost per vehicle revenue hour basis used in the current contract.
- Consider use of taxi service to "shave peak demand" periods and thus reduce the overall number of maximum vehicles used by the contractor in service (see previous strategy discussion), perhaps up to some maximum percentage of total trips. Omnitrans' new contract with MV Transportation, awarded June 6, 2015, encourages use of taxis for certain trips. The contract also includes incentives and penalties for combined levels of passenger-per-hour and on-time performance.
- Work with VTrans to shift additional peak period demand to social service agency transportation services contracted with VTrans. Omnitrans staff agreed that the cost per passenger on those services can be lower than Omnitrans Access service because such social service agencies are serving clients with "many origins going to one destination" rather than the "many to many" experienced by regular ADA paratransit. However, to the extent that Access is able to serve social service agency destinations with grouped trips, this actually improves Access productivity; shifting too many of such trips to social service agencies could actually reduce Access productivity and increase cost per passenger. So, the right balance between these service options needs to be achieved.

#### Conclusion

Omnitrans staff considered these concepts in formulating their Request for Proposals and contract for the new ADA paratransit contractor. Without a detailed review of demand vs. supply for service, it is not possible to estimate the potential savings from these options.

#### 5.2.1.5 Heavy Overhaul/Repair

This strategy evaluates potential savings from combining heavy overhaul and repair activities among multiple transit agencies.

#### Strategy Approach

Initially, bus overhaul and repair data were collected from the five participating agencies through a survey. Data were then aggregated over a 4-year period, including the costs incurred by each participating agency in the current budget year as well as those budgeted for the following 3 years. Savings were then analyzed based on nationwide industry experience for centralized overhaul operations and projected both for each agency, as well as expected combined savings for agencies interested in a joint heavy overhaul procurement strategy.

#### Analysis

While the industry literature on expected savings is mixed for heavy overhauls and related maintenance and is less than that of bus procurements (FTA, 2010; Transit Cooperative Research Program, 2004), the review indicates that such group arrangements typically reduce each participating agency's heavy overhaul costs by roughly 5 percent, about half the percentage for bus procurements. This is mainly achieved through the economies of scale that a single repair contractor or centralized inhouse operation can afford. Table 5-10 provides the estimated savings from joint procurement of bus heavy overhauls and related maintenance based on the interested agencies' current activity levels, over a 4-year period. Again, this amount assumes that the interested agencies mentioned herein are not currently engaged in any group purchasing activities related to this category of maintenance activities. According to the Transit Agency Functional Questionnaire completed by each agency, the interested agencies are either performing this activity in-house or have separate contracts with outside vendors to perform this activity (SANBAG, 2014a).

## Table 5-10. Participating Agency Bus Heavy Overhaul and Repair Costs and Projected Savings Over a 4-Year Period

	Total	Omnitrans	VVTA	MBTA	МТ	VTrans	
Overhaul Costs	\$4,656,200	\$4,068,000	\$380,000	\$130,000	\$78,200	N/A	
Number of overhauls	342	322	20	N/A	N/A	N/A	
Projected four-year savings	\$232,810	\$203,400	\$19,000	\$6,500	\$3,910	N/A	
Source: Overhaul Costs and Number of Overhauls from Agencies' Data Request forms							

#### Conclusion

It is recommended that the four transit agencies who expressed interest in this area engage in discussions on either a joint procurement for a heavy overhaul contract and/or discuss the possibility of Omnitrans providing this service for the other agencies if its costs are lower than contracted costs and excess capacity exists to perform this service<sup>7</sup>. It is important to note that while joint bus procurements typically allow for each participating agency to specify some of its own items, heavy overhaul savings are not significant if there are many engine and transmission models. Thus, the technical options allowed in the contract and solicitation documents for a contractor option or in interagency protocols for a centralized direct provision method must be tightly controlled. Currently, there are few heavy-duty engine and transmission models in transit applications. Also, a review of VVTA's and Omnitrans' fleets indicates relatively few

<sup>&</sup>lt;sup>7</sup> In July, Omnitrans staff indicated that they had begun studying joint procurement for heavy overhaul.

differences in engines and transmissions, so this does not appear to be a significant issue at this time.

Typically, a group purchase or in-house service is led by one of the larger participating agencies, due to the staff required.

#### 5.2.1.6 Bus Parts Procurement

This strategy evaluates potential savings from joint procurement of bus parts by the participating agencies.

#### Strategy Approach

As with the other strategies, bus parts procurement data were collected from two of the four interested agencies through a survey (Omnitrans and VVTA). However, the other two agencies were not able to provide data, though their size should not significantly affect the outcome of these estimates. The data were then aggregated over a 4-year period, including the costs incurred by each participating agency in the current budget year as well as those budgeted for the following 3 years. Savings were then analyzed based on industry experience for parts volume purchases and projected both for each agency as well as expected combined savings for agencies interested in a joint parts procurement strategy.

#### Analysis

While the industry literature on expected savings is mixed as it is with new bus procurement (FTA, 2010; CUTR, 2013), it is about as extensive as for bus purchases due to some early experiences with on-line ordering and other national and state-wide procurement options in the industry. For example, virtually all of the major bus manufacturers also have extensive parts divisions that carry components, parts and accessories of the other major manufacturers. From this literature, and because of the more extensive history with group parts purchasing, it is assumed that such group purchases typically reduce each participating agency's procurement costs by roughly 10-15 percent, so a midpoint of 12 percent was used herein. This is achieved not only through specification of common components and model platform but also through the time value of the procurement process itself, which with parts can often be a near just-in-time arrangement. Table 5-11 presents the results of this analysis, with combined 4-year savings projected at \$1,629,600 for the two agencies evaluated.

## Table 5-11. Participating Agency Bus Parts Costs and Projected Savings Over a 4-Year Period

	Total	Omnitrans	VVTA	MBTA	VTrans
Current/					
Projected	\$13,580,000	\$10,800,000	\$2,780,000	N/A	N/A
Parts Costs					
Projected					
four-year	\$1,629,600	\$1,296,000	\$333,600		
savings					
Source: Parts Costs expenditures from Agencies' Data Request Forms					

#### SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

#### Conclusion

It is recommended that Omnitrans and VVTA engage in discussions a joint procurement for a bus parts contract. It is important to note that, for VVTA to participate, the costs for parts would need to be lower than what VVTA currently obtains from their contractor's national contracts. It is also important to note that joint bus procurement arrangements typically allow for each participating agency to specify its own seats, flooring, paint livery and other non-structural items, and in some cases even their own engines and transmissions. However, as with bus procurements, as the additional individual items ordered by each agency increase, the expected volume and time discounts are reduced. Thus, the technical options allowed in the contract and solicitation documents should be tightly controlled, though because of the larger companies that offer such arrangements, these controls need not be as strict as with bus procurements.

Again, a group purchase is typically led by one of the larger participating agencies, though the staff time and expertise required for conducting such procurement is less critical than with a bus procurement.

#### 5.2.1.7 Automotive Parts Procurement

Initially, procurement data of this type were collected from only two participating agencies through a survey; data for the other two were not available. Data were then aggregated over a 4-year period, including the costs incurred by each participating agency in the current budget year as well as those budgeted for the following 3 years. Savings were then analyzed based on industry experience for volume purchases and projected both for each agency as well as expected combined savings for agencies interested in a joint bus procurement strategy.

Because the data were so limited, it is not deemed to be a strategy with significant potential. Moreover, the kinds of parts that can be ordered through an automotive parts distributor can also be ordered from the more bus-specific providers described above. Fleet uniformity may also be a factor in such joint procurements.

#### 5.2.1.8 Tire Contracts

The transit agencies acquire replacement tires for their buses through one of two methods: tire purchases or tire leases. This strategy evaluates the potential for cost economies through combined tire purchasing or leasing.

#### Strategy Approach

As with the other strategies, tire procurement data were collected from each participating agency through a survey; in this case, Omnitrans, VVTA, and MARTA provided data. The data were then aggregated over the 4-year period, including the costs incurred by each participating agency in the current budget year as well as those budgeted for the following 3 years. Savings were then analyzed based on industry experience for volume purchases and projected both for each agency as well as expected combined savings for agencies interested in a joint tire procurement strategy.

#### Analysis

Tire leases tend to be the norm for the industry, particularly among larger agencies, and as with any other procurement need, larger volumes will result in larger discounts. In this case, roughly five percent savings is normally assumed based on industry experience with pooled parts procurements (York, qtd. in Metro Magazine 2009). However, because two of the interested agencies order much smaller volumes of tires than the largest agency (Omnitrans), the most feasible strategy that could result in the most significant savings is for the other two agencies to lease tires from the Omnitrans supplier, the largest leasor of tires in the county and therefore the one with the most procurement leverage. To be more conservative, the savings are assumed to be only 10 percent of the dollar value of the two smaller properties' tire purchases as a percentage of Omnitrans' purchases, added to the Omnitrans contract, which works out to a 4.4 percent average savings overall. Table 5-12 provides an estimate of the potential savings.

# Table 5-12. Participating Agency Tire Costs, Procurement Methods, and ProjectedSavings Over a 4-year Period

	Total	Omnitrans	VVTA	МТ
Procurement Method		Lease	Purchase	Lease
Projected 4- year Tire Costs	\$2,666,801	\$1,856,000	\$568,068	\$242,733
Projected four- year savings	\$116,500	\$81,080	\$24,816	\$10,604

#### Conclusion

In order for a joint leasing strategy to be achieved, the lease contracts must be rationalized to the same procurement schedule. In addition, for this strategy to have any savings potential, VVTA would need to switch from a tire purchasing approach to a tire leasing approach, and would need to remove the supply of tires from its contract with Transdev. Given VVTA's contracted operation model, this change may not make sense for the relatively small estimated savings gained.

#### 5.2.1.9 CNG Fuel Procurement

This strategy examines the potential for savings through combined procurement of CNG bus fuel.

#### Strategy Approach

CNG fuel consumption and cost data were collected from each participating agency through a survey; in this case, Omnitrans, VVTA, and MBTA provided data. The data were then aggregated over the 4-year period, including the costs incurred by each participating agency in the current budget year as well as those budgeted for the following 3 years. Savings were estimated by looking at three different fuel price scenarios based on recent San Bernardino County transit agency fuel market experience.

The literature regarding a variety of group procurement strategies to achieve fuel cost savings were examined (Friedman and DeCorla-Souza, 2012), including forward-fuel purchasing contracts that have been used by Omnitrans, as well as other hedging strategies, assignment of contract options similar to bus procurements and commercial third-party pooled purchase services regularly used by other types of government-owned vehicle fleets.

A recent research report (TCRP, 2012) describes both the broad variety of fuel purchasing strategies as well as those most often used public transportation. These include:

- Forward-fuel fixed-price purchasing contracts, in which the fuel consumer such as a
  public transportation agency agrees to a physical fuel supply contract with a fixed
  volume and fixed price;
- Exchange-traded futures contracts, whereby the agency enters into a futures contracts on a publicly traded exchange for the future delivery of fuel at today's market prices. The contract pays out to the agency if the price of fuel rises;
- Over-the-Counter swaps, which resemble futures contracts except that contractor, which is called a counterparty, is a financial institution or a specialized department of one of the major energy companies;
- Options contracts, which behave like price protection insurance in that they give the agency the right, but not the obligation, to purchase or sell fuel at a future date at a predetermined price in exchange for one or more premium payments; and
- Web-based price protection service, which resemble options contracts but are typically much more expensive than other options because of the more intensive administrative support that is provided.

A group purchase contract directly negotiated with one of the current fuel providers (Southern California Gas Company for Omnitrans and MBTA, and Southwest Gas for VVTA) was also analyzed but due to available pipelines and service territories of the two providers, this option was deemed to be less feasible than other group purchase strategies.

In 2014, Omnitrans had suspended its forward-fuel purchasing program, because the prices quoted by its fuel futures contractor (Morgan Stanley) were not competitive with pricings that are available using conventional fuel procurement methods (Omnitrans, 2014b). However, in 2015, Omnitrans reinstituted fuel hedging after achieving the desired spot price. The decision on whether to continue fuel hedging is reviewed annually. MBTA's per gasoline gallon equivalent (GGE) price was actually lower than Omnitrans' previous hedging strategy. Omnitrans represents a much larger volume of fuel than the two other agencies' fuel use combined. Omnitrans staff continues to monitor CNG spot prices.

#### Conclusion

Because of the experience that Omnitrans has had with such strategies, a forward fuel fixed-price purchasing contract led by Omnitrans is recommended for further study, in an

attempt to take advantage of the larger combined volume of the three interested agencies. Such contracts are scalable, which would more easily accommodate additional agency participants interested in exploring this strategy. This choice could also provide the basis for adding some of the other strategies as desired by the group interested in a more complex combined fuel purchasing strategy.

Table 5-13 presents the potential 4-year savings which would accrue to participating agencies under three possible group purchasing scenarios: 1) one that is set at the current Omnitrans price of \$1.02 per GGE, affording some savings for VVTA; 2) a combined VVTA and Omnitrans forward-fuel contract that held the price at the Omnitrans target price of 92 cents per GGE, should Omnitrans be able to negotiate such a contract price in the future; and 3) one in which the first scenario is achieved plus MBTA is also able negotiate an additional 5 percent through leveraging an option to join the forward-fuel contract, adding its volume to the contract. A three percent annual cost inflator is assumed for future savings.

Table 5-13.	Participating Agency CNG fuel Costs and Projected Savings Over	r a
	4-Year Period	

	Total	Omnitrans	VVTA	MBTA		
Projected Total Fuel Costs - 4 Years	\$19,618,675	\$15,737,000	\$3,120,748	\$760,927		
Scenario 1: Projected four- year savings: VVTA joins Omnitrans' current pricing	\$97,919	\$0	\$97,919	N⁄A		
Scenario 2: Projected four- year savings: target price scenario	\$763,708	\$439,132	\$324,576	N/A		
Scenario 3: Projected four- year savings: most optimistic scenario	\$1,330,407	\$764,984	\$527,377	\$38,046		
*Source: Current fuel costs from Agencies Data Request Forms. Due to the discussion in the next section of this analysis, Omnitrans' savings are calculated for the West Valley facility only.						

#### 5.2.1.10 CNG Conversion at Omnitrans

The project team conducted a high-level evaluation of the feasibility of converting the Omnitrans West Valley facility back to pure CNG operation from its currently configured liquefied-to-compressed natural gas (LCNG) design.

#### Strategy Approach

The project team first examined the issues surrounding the agency's LCNG conversion of its two fueling facilities, from their original design as CNG fueling facilities. The team focused on the issues and feasibility of converting only the West Valley facility. The team also examined the costs and benefits of such a conversion project, including the benefits of such a conversion to other agencies in the County participating in this study. Omnitrans began operation of both of its LCNG fueling stations at the San Bernardino and Montclair operations facilities in June 2002. The decision was in response to neighborhood concerns regarding earlier vintage CNG equipment periodically venting excess gas with odorant into adjacent residential areas near the San Bernardino facility.

The LCNG technology operates as follows: each facility stores LNG at minus 250 degrees Fahrenheit, using vacuum pressure and insulation to keep the fuel cold. When needed, LNG is pumped from the tanks and passes through a vaporizer that changes the fuel from a liquid to a gaseous state and is then transferred to onboard fuel tanks on the roof of each bus. The agency's East Valley fueling station houses two 30,000 gallon, double-walled storage tanks; its West Valley station houses a single 20,000 gallon double-walled storage tank. Approximately two-thirds of the fleet's daily consumption is used in the East Valley location (and where the neighborhood concerns are located), with the remaining third of the fuel being provided at the West Valley which is in an industrial location.

Omnitrans' fleet requires approximately 11,000 gallons of fuel each weekday. To ensure that the tanks have the necessary quantities to ensure reliability of daily bus operations, LNG is delivered to the facility six days per week via tanker truck. In addition, the first ADA paratransit service vans fueled by CNG will arrive at the agency soon which will increase the need for CNG further. Initially Omnitrans plans to fuel these vehicles at a nearby facility owned by the City of San Bernardino.

The affected neighborhoods continue to remain concerned about the impacts of LNG storage on each site. In March 2004, a study, mandated by state legislation (Senate Bill 1927), was completed to evaluate any potential environmental and health impacts of Omnitrans' three fueling facilities, including its CNG fueling facility. This study found that any environmental risks posed by these facilities do not exceed thresholds established by either the U.S. Environmental Protection Agency or the California Environmental Protection Agency.

Since then, Omnitrans continues to be concerned about the neighborhood sensitivity to LNG operations, but also desired to study the cost differences of "straight CNG" fueling facilities compared to the current LCNG technology due to the substantial drop in natural gas prices in recent years. In addition, neighborhood concerns have changed in the past few years, and now focus concerns about the LNG storage tanks on site and a possible explosion. Accordingly, the agency engaged a consultant to study whether conversion of the LCNG fueling facilities at both yards is feasible and to assess the conversion's cost. After the analysis in the Transit Efficiency Study for conversion of only the west facility was completed, Omnitrans' consultant completed their study and Omnitrans has made a decision to proceed with conversion of both yards to CNG over the next few years.

ALT (Applied LNG Technology, www.appliedlng.com) is the supplier of all the LNG fuel and the maintainer of the systems at both maintenance facilities. Thus, one option available to Omnitrans is to amend the current contract to design and implement a conversion of the current LCNG facilities to CNG fueling. Although the most recent national data available (Westport, 2013; U.S. Department of Energy, 2014) estimates that the cost of LNG is roughly 16 cents more expensive on a diesel gallon equivalent basis than that of CNG, Omnitrans staff estimated that its agency's differential on a GGE basis is even greater, at 51 cents per gallon equivalent. Moreover, the cost of a new CNG facility is roughly twice that of an LNG fueling facility, at between \$3 million and \$4 million each, according to the same industry sources.

#### Conclusion

Table 5-14 illustrates the price differential of both fuels using three CNG cost scenarios in an approach similar to those presented in the previous strategy on pooled CNG purchasing. Scenario 1 is the most conservative scenario and assumes Omnitrans is able to purchase CNG for \$0.92 per GGE, which is \$0.10 less per GGE than the equivalent currently being paid for LCNG. Scenario 2 assumes Omnitrans is able to purchase CNG at MBTA's rate of \$0.86 per GGE, a \$0.16 savings per GGE. Scenario 3 assumes Omnitrans is able to obtain the \$0.51 savings per GGE as stated during their site meeting with the study team in April 2014. The resulting estimated potential annual fuel cost savings ranges from a low of \$88,600 to a high of \$451,860. Estimated 4-year total savings for each scenario is also provided to be consistent with data for the other strategies. All of these estimates were calculated assuming conversion of the West Valley facility only. Based on the recent Omnitrans decision to proceed with conversion of both facilities, potential cost savings would be roughly three times these amounts for each scenario, given the relative difference in miles operated from each facility.

As shown in Table 5-14, the estimated payback period on the required capital investment from operating savings alone could take anywhere from about 8 years to nearly 40 years for the West Valley conversion, depending on which CNG cost scenario is closed to the ultimate outcome. Payback would be quicker at the East Valley Facility, where roughly twice as much fuel is used. It should be noted that the capital costs associated with a CNG fueling conversion would likely be funded by separate grants (e.g., from the FTA Major Capital Investment Bus and Bus Facilities Program), and thus not appear in the Omnitrans annual operating budget.

# Table 5-14. Estimated Cost Savings of using CNG vs. LCNG for the Omnitrans WestValley Facility

LCNG vs. CNG Cost Analysis, West Valley	Current Cost	Estimated	Estimated	Estimated 4-
Yard	per GGE,	Cost per GGE	Annual	Year Savings
	Using LCNG	Using CNG	Savings	
Estimated Cost Savings – Scenario 1 -				
Low Estimate - \$.0.10/GGE Savings				
Annual Fuel Costs	¢000 700	<b>#045 400</b>	<b>#00.000</b>	<b>\$254 400</b>
(West Valley Facility Only)	\$903,720	\$815,1∠∪	\$88,600	\$354,400
Annual Fuel Consumption (GGEs - West Valley Facility Only)	886,000	886,000	-	
Unit Cost (Gasoline Gallon Equivalent – GGE)	\$1.02	\$0.92	\$0.10	
Estimated Cost Savings – Scenario 2 - Mid-Level Estimate Based on MBTA's GGE Cost - \$0.16/GGE Savings				
Annual Fuel Costs	¢002 720	\$761.060	¢1 41 760	¢EC7.040
(West Valley Facility Only)	\$903,720	\$761,900	\$141,760	3007,040
Unit Cost (Gasoline Gallon Equivalent – GGE)	\$1.02	\$0.86	\$0.16	
Estimated Cost Savings – Scenario 3 - High Level Estimate Based on Omnitrans' Stated Potential \$0.51/GGE Savings				
Annual Fuel Costs	\$903 720	\$451 860	\$451 860	¢1 807 440
(West Valley Facility Only)	ψ300,120	ψτοτ,000	φ+01,000	ψ1,007,-+0
Unit Cost (Gasoline Gallon Equivalent – GGE)	\$1.02	\$0.51	\$0.51	
Estimated Facility Conversion Capital Cost*			\$3,500,000	
Cost Recovery - Scenario 1 (Years)			39.5	
Cost Recovery - Scenario 2 (Years)			24.7	
Cost Recovery - Scenario 3 (Years)			7.7	
*Assumes the average of a \$3-4 million capital bu	udget for facility (ty	pical)		

#### **5.2.1.11** CNG Station Maintenance

The project team evaluated the feasibility of joint procurement of CNG facility maintenance for all interested agencies in the county.

#### Strategy Approach

The project team first analyzed the existing contract arrangements for each of the interested agencies, Omnitrans, and MBTA. VVTA subsequently also indicated an

interest in this area<sup>8</sup>. Omnitrans' contract for station maintenance is included in its turnkey design, construction and operations contract with ALT, as noted earlier. MBTA's station maintenance is provided by Clean Energy as part of a similar contract with that agency. VVTA's CNG station maintenance is a part of its contracted services with Transdev, its services contractor.

The important issue to consider on a joint procurement with a contract maintenance provider would be the commercial and legal considerations and contract timing for each agency. That said, it is believed that Omnitrans' supplier could be amenable to undertaking the work in a new joint procurement, or in a procurement whereby one of the agencies assigns a current option in an existing contract to the other agency.

Should VVTA be interested in a group maintenance contract in the future, Clean Energy's presence in the County, as the designer and constructor of the other agencies' equipment, would make that firm well-positioned to propose on a joint procurement as maintainer of all three agencies' fueling equipment, which could provide further synergies and cost savings to all three agencies. Under this scenario, VVTA would have to remove its current CNG services provision from its Transdev contract.

#### Conclusion

Because of the timing of the current contracts and the issues associated with such procurements, further study needs to be undertaken as to whether Omnitrans' new LNG contractor may be able to provide station maintenance for VVTA and MBTA also. Accordingly, potential cost savings for this strategy cannot be estimated at this time. Alternatively, VVTA's contractor could potentially provide the service to all three agencies if its maintenance resources are sufficient.

#### 5.2.2 Low- to Mid-Level Potential Cost Saving Items

**5.2.2.1** Regional Telephone Customer Information Center (CIC)

This strategy evaluates the potential to develop a regional telephone information center for transit services.

#### Strategy Approach

Evaluate agency responses, call load and other information provided, to determine if a countywide strategy is appropriate, applicable and cost-effective.

Omnitrans is the only agency with a dedicated, in-house call-taking function. For FY 14, there are 8.25 FTEs in the information center activity, with annual staff hours totaling

<sup>&</sup>lt;sup>8</sup> VVTA indicated this interest with its submittal of follow-up information to the study team on 12/24/14, as follows: "VVTA believes there is an opportunity to share the maintenance cost of CNG facilities. BAT, Omni, MBTA, and VVTA all have CNG fueling stations and a consolidated maintenance staff centrally located could improve preventive maintenance and more quickly address emergencies. Furthermore, a CNG Tanker could be procured for emergency fueling in the field."

17,160 hours. Omnitrans anticipates that this function will increase to 10 FTEs by FY 16. There are no contract costs associated with this function. The Customer Service Supervisor oversees the center as well as the customer service function. There are five full-time and two part-time customer information clerks who provide customer assistance. The Customer Information Center (CIC) is open Monday through Friday from 7:00 a.m. to 6:00 p.m. and Saturdays and Sundays from 8:00 a.m. to 5:00 p.m.

VVTA provides 2,037 hours of staff time (between a Senior Customer Service staff and a Clerk) to respond to customer inquiries at a window/reception at the Agency, as well as respond to agency customer calls and inquiries. In addition to the reception responsibilities, this position also handles pass sales, customer questions and complaints, and ADA questions. The VVTA customer service window is open Monday through Friday from 8:00 a.m. to 5:00 p.m. and staff utilizes TransTrack for customer service complaint tracking. In addition, VVTA's contractor Transdev handles all customer calls for route and schedule information during hours of operation. Their staff handles those calls between dispatch and reservations. Finally, VVTA will be installing an IVR (Interactive Voice Response) system which will allow for automated customer service with regard to route and schedule information.

MBTA in-house cost for this function is through the dispatching department, and for FY 14, the estimated costs are \$90,657 which is inclusive of all functions covered by dispatching. There are no contract costs associated with this function. The four dispatchers share the customer service and transit information responsibilities, along with vehicle dispatching duties.

MARTA estimates in-house costs for FY 14 are \$91,000 which is inclusive of multiple functions covered by supervisors and dispatchers. There are no contract costs associated with this function. There are two Operations Supervisors and two Dispatchers involved in responding to all customer calls and resolving issues; however, these positions also have additional responsibilities in addition to customer call-taking and addressing complaints. MARTA utilizes TransTrack to track customer comments and complaints.

VTrans did not identify any in-house or contracted costs attributed to customer information.

#### Analysis

Omnitrans is the only transit agency that has a formal, dedicated staffed in-house CIC. All other transit agencies provide information through existing staff who have other responsibilities in addition to call taking/information dissemination to the riding public. In addition, all agencies have participated in the Inland Empire 511 phone tree; while in the system and upon request, a user can be transferred to each of the transit agencies for transit information.

#### Conclusion

All of the agencies initially showed interest in this strategy; however when hours and cost information were calculated and provided, their conclusion was that they were not

interested in purchasing or providing this service. Any "purchasing" of a call taking function would result in additional costs and training, and the existing staff would remain to attend to their other duties and responsibilities. As a result, it appears that there is no countywide cost-saving opportunity for this strategy.

However, in the future, should call demand outweigh available transit agency resources, discussions could take place with Omnitrans for call overflow, or call taking outside of normal business hours. A memorandum of understanding (MOU) would have to be developed, as well as a "cost" per call or another basis for billing to the "buyer" transit agency. In addition, Omnitrans would have to upgrade their call taking software (provided by LA Metro) or utilize Google Transit to respond to non-Omnitrans customer requests and inquiries. Another option would be to "piggy back" on another privatized call center (LA Metro or Orange County Transportation Authority [OCTA]) to expand their systems to accept additional transit operator calls. This would most likely result in a one-time set-up fee and testing, and then a reimbursement of calls taken on a per call basis.

#### 5.2.2.2 Project Development/Construction Management

During the transit agency functional assessment phase of the study, it was recognized that the San Bernardino Associated Governments (SANBAG) has project development and construction management expertise through its direct staff and on-call consultants, which may be of value to the transit agencies when they have a need for expertise during project development or large projects. This strategy proposes an approach for sharing this expertise. It should also be noted that, as part of the Comprehensive Operational Analysis process recently performed for Omnitrans, it was agreed that SANBAG would lead delivery of all major capital projects in the future<sup>9</sup>.

#### Strategy Approach

Ascertain the type of assistance that may be required, which agency(s) are willing and able to provide such assistance and develop a template Cooperative Agreement that could be customized based on the transit agency's needs and the provider's available staffing/consultants.

SANBAG has in-house engineers, procurement staff, and in-house contract staff who have expertise to provide a variety of project development, management and construction management services to the transit operators. In addition, SANBAG has on-call contracts with two consultant teams that, upon issuance of a task order, can provide transit planning, program management, engineering, construction management and many other transit-related services. Although SANBAG contracts out facility management, their staff and consultants possess that expertise. SANBAG is currently in the process of hiring an in-house Right-of-Way (ROW) Manager.

Omnitrans currently has a cooperative effort with SANBAG for the design and construction of the San Bernardino Transit Center. In the past, Omnitrans has reached

<sup>&</sup>lt;sup>9</sup> Information per SANBAG staff provided on May 18, 2015.

out to other transit agencies to offer joint efforts and services; however, no other transit agencies have taken advantage of this offer thus far. Omnitrans has a variety of inhouse expertise that may be of assistance to other transit agencies, including:

- Facility staff that can provide project management oversight for minor facilitiesrelated capital improvement projects.
- All construction and maintenance of Omnitrans' bus shelters and stops is completed by in-house staff, with occasional contract support for shelter construction.
- The Senior Contracts Administrator is involved in construction projects and there are a variety of Project Managers throughout the agency, assigned to specific projects. Omnitrans staff noted that the ability of the agency to provide project development/construction management services to other agencies could require additional staff resources, depending on the project and current work loads. The Omnitrans Chief Executive Officer/General Manager is ultimately responsible for all large scale projects and construction projects in coordination with SANBAG.

VVTA does not have dedicated, in-house, large-scale project management staffing, as the Executive Director oversees all construction projects and capital planning efforts. All facility construction, management and maintenance are contracted out to a third party. Fueling Station oversight and maintenance is contracted-out. The Director of Maintenance and Facilities oversees the contractor to ensure that the facility and fueling station are maintained properly and assists with management of these activities.VVTA provides bus shelters and amenities but Member Agencies install and maintain them. VVTA does not own any right-of-way.

MBTA does not have dedicated, in-house, large-scale project management staffing, as the General Manger oversees all construction projects and capital planning efforts. The agency owns the Joshua Tree Operations facility (the single maintenance center), the Yucca Valley Transportation Center and the Twentynine Palms Transportation Center. Their fueling station at the Joshua Tree yard is maintained by Clean Energy, and natural gas is supplied through the Southern California Gas company. All maintenance of bus stop amenities are performed by in-house staff and the agency does not own any ROW.

MARTA does not have dedicated, in-house, large scale project management staffing, as the General Manger oversees all construction projects and capital planning efforts. The agency owns the administrative/maintenance facilities in Crestline and in Big Bear Lake, but they do not own/operate fueling facilities as MARTA contracts with the county for offsite fuel. Bus stop signs are installed/maintained by contractor and in-house staff; shelters are installed through a contractor. The agency does not own any right-of-way. MARTA identified one specific area where project development assistance will be needed, in the evaluation on their current maintenance facilities to support changes in the revenue fleet and growth in ridership.

The City of Needles did not reference any construction, facility and/or project management staff or issues, as all work is performed through existing city staff or contracted out through the city.

VTrans has an on-call planner who works on special projects, such as the maintenance study. VTrans does not own any facilities or ROW, and there are no capital projects and no need/request for large-scale projects. VTrans is leasing an industrial building in Ontario and recently conducted tenant improvements to convert it to a paratransit vehicle preventative maintenance facility.

#### Analysis

Most transit agencies have facility, project development and construction needs from time to time, but do not necessarily have the in-house staff or contract staff on call to provide the services. For the smaller agencies, project development/construction management has been provided primarily through the transit agency's Executive Director or General Manager. Therefore, implementation of a Cooperative Agreement arrangement between either SANBAG or Omnitrans and the other agencies for these services is not likely to result in a reduction in direct costs, as existing staff's time will be taken up quickly by many other duties. But, through this structure, assistance on a specific funded capital project can be provided quickly, without a lengthy/costly procurement process and will not add to the existing staff's workload. A Cooperative Service arrangement is highly dependent upon the "providing" agency having the right/appropriate/experienced staff available when needed, as well as a mechanism to track the staff's time on the project and invoice the "purchaser" for the services.

#### Conclusion

SANBAG can provide large-scale project development and construction management services, and Omnitrans is amenable to providing minor project development/construction management services to interested transit agencies, on a cost reimbursement basis. A Cooperative Agreement has been drafted (see Appendix D) that can serve as a template when a "purchasing" transit agency has the need and all parties agree to a scope of work and budget.

#### 5.2.2.3 Regional Marketing

This strategy explores development of a regional marketing program among the San Bernardino County transit operators.

#### Strategy Approach

Review marketing programs to date and countywide efforts to promote ridership and transit awareness. A coordinated regional marketing program may not result in a direct reduction in transit agency costs; however, such a program may contribute to ridership and long-term service productivity improvements, provide a consistent message throughout the County about transit services and benefits, and improve the quality and diversity of information available to the customer.

SANBAG has two in-house staff that provide primarily public relations as well as projectspecific outreach. Most project-related outreach is performed by contract staff on a project-by-project basis. Regarding the implementation of traditional transit marketing services, those services are primarily developed and implemented by the project-specific marketing consultants and not through in-house SANBAG staff. Omnitrans dedicates 7,280 in-house hours towards marketing activities which equates to 3.5 FTEs per fiscal year. Contract costs for FY 14 are \$276,000 and increase slightly each fiscal year thereafter. Contract costs do not include pass through for media advertising expense.

Omnitrans typically conducts three or four major advertising campaigns per year, which utilize a mix of paid media, customer communications, and outreach. These are typically tied to service/fare changes, other service enhancements/special programs, as well as regional/industry/national promotions. Omnitrans schedules all marketing campaigns through a detailed calendaring process and their current marketing plan is available online at this link: <a href="http://omnitrans.org/about/reports/files/FY15M-PlanFinal.pdf">http://omnitrans.org/about/reports/files/FY15M-PlanFinal.pdf</a>. The various strategies include print media, newspapers, flyers, brochures, bus shelter ads, website advertisement, direct mail, radio, sporting events and "one-sheet" ads found outside of convenience stores.

In addition to the Omnitrans' website, Omnitrans has a robust ongoing social media campaign, including Facebook, Instagram, Twitter, YouTube, Flicker, a blog, as well as a mobile application.

VVTA employs a full-time Marketing Manager who is also responsible for the Agency's Civil Rights Compliance program. This staff is responsible for various in-house applications, Google Transit, website, social media and advertising buys. The Executive Director and Mobility Manager are also involved with agency's marketing program. VVTA also partners with SANBAG during unmet needs public hearings and public outreach. In addition to these staff, VVTA contracts out \$25,000 per fiscal year for printing/other marketing services. Current marketing activities include a website, Facebook page, Instagram, YouTube and Twitter posts, newspaper advertisements, flyers onboard buses and at Park-n-Ride lots, occasional radio spots, a billboard at the Maverick's stadium and vanpool billboard advertisements.

MBTA does not have dedicated marketing staff, and estimates that 10 percent of the General Manager's time can be attributed to marketing efforts (\$18,000 for FY14). The General Manager is responsible for marketing and all local outreach and community efforts. There are also efforts performed in partnership with SANBAG during unmet needs hearings, planned outreach, etc. Contract costs for graphics are approximately \$2,000 each fiscal year, and printing costs are approximately \$9,000 annually. Current marketing activities include a website, Facebook page, newspaper advertisements, brochures and banners provided to the Marine Base, website advertisement, radio spots and a billboard on the Marine base sporting field. MBTA routinely advertises through their general marketing effort that their commuter routes to Palm Springs also connect with Sunline Transit and Amtrak.

MARTA does not have dedicated marketing staff, and across all staff the annual marketing efforts equate to \$17,000 in fully burdened staff costs. Contract costs are approximately \$8,000 for FY 14. The General Manager is ultimately responsible for all marketing efforts, and various agency staff assist in marketing development and implementation. MARTA does not utilize social media; however, the agency promotes their service through mountain-area newspapers, quarterly publications to resorts and

hotels, flyers, brochures, website advertisement, bus shelters, radio and ads at the local movie theaters.

The City of Needles estimates that the agency expends approximately 20 hours inhouse per fiscal year for transit marketing. There are no external contract costs. Assume that any marketing/outreach is wrapped into citywide efforts and absorbed by the city. The City of Needles provides flyers and brochures that promote transit and are available on buses, public agencies, hospitals and other public locations. They do not employ social media strategies.

VTrans did not identify any in-house costs attributed to marketing efforts, and stated the Agency only markets their travel training program. FY14 marketing contract costs are under \$8,000. The Chief Executive Officer is the primary staff person involved in all marketing/outreach efforts.

#### Analysis

With the exception of the dedicated staff at Omnitrans and VVTA, the other transit agencies do not have dedicated marketing staff and in most cases, the Executive Director or General Manager provides that expertise and role. Therefore, any additional marketing or outreach assistance provided through another agency or contract services will not result in a cost-savings at the smaller agencies. All agencies have formed partnerships with colleges, social service agencies and other businesses as a way of reaching the riding public. They also are tapping into the local media (newspapers and radio) and most utilize their websites as the primary outlet for disseminating new information.

The smaller agencies have not extensively engaged the social media market, and some suggested that a "tool kit" for this type of information dissemination, as well as other cutting edge marketing techniques, would be of use.

Those agencies that connect to other transit agencies are promoting and advertising those connections through existing outreach channels; however, most agreed that this is an area that can be strengthened through a regional campaign or a consistent marketing message.

#### Conclusion

The smaller transit agencies would benefit from marketing assistance and expertise, specific to their individual markets. Another area that is not being provided is a coordinated marketing effort with a consistent message delivered county-wide, to promote transit in general as well as transit alternatives to regional travelers. As a result, the study team has the following recommendations:

 The development of an annual "tool kit" that provides a menu of marketing strategies (template campaigns, social media, slogans, flyers, materials) to be customized to each transit agency. This "tool kit" would be a benefit to the smaller agencies in that they could tailor the strategies to their communities while consistent messages countywide would assist in reaching the multi-transit jurisdiction commuters as well. When there are national campaign opportunities (Rideshare Week or Transit Appreciation Day), the implementation of a consistent message/campaigns in all of the markets would be extremely valuable. An annual effort to develop a "tool kit" would be approximately \$5,000 (plus any additional assistance to tailor or implement at each of the agencies).

- 2. Since the smaller, rural agencies do not employ dedicated marketing personnel, there is also a need to engage in a professional services agreement with Omnitrans or SANBAG for staff and/or consultants to assist the smaller transit agencies as needed. Both SANBAG or its on-call consultants, and Omnitrans, are amenable to providing these services on a cost reimbursement basis. A Cooperative Agreement has been drafted that can serve as a template for when a "purchasing" transit agency has the need, staff and/or consultants are available and all parties agree to a scope of work and budget (see Appendix D). Another service the "providing" agency could perform is to develop and implement marketing strategies on behalf of the "purchasing" agency, including, but not limited to social media strategies.
- 3. Since a regional transit marketing plan has never been developed for the county, there would be a benefit for SANBAG to utilize an on-call consulting team to analyze existing strategies, markets and results, and develop a multi-year marketing plan that would also explore regional advertising mechanisms and media buys that could benefit both urban and rural areas on a cost-effective basis. A well-thought-out multi-year plan with a mechanism to track results and effectiveness could prove beneficial in raising transit awareness and increasing ridership, particularly on regional services. One agency suggested a review of recent American Public Transportation Association (APTA) marketing strategies to incorporate into a regional planning effort.

#### 5.2.2.4 Mutual Aid Agreements

This strategy investigates the benefit of establishing mutual aid agreements between certain transit operators, focusing on those agencies with overlapping services.

#### Strategy Approach

Ascertain the type of assistance that may be required, which agency(s) are willing and able to provide such assistance and develop a template MOU that could be customized based on the purchaser and the provider.

The labor, cost, and effort for a small transit agency to attend to occasional service needs away from their primary service area are significant, and create a major inconvenience and possibly safety issue to the operator and passengers. In addition, their could be an occasional need for mutual aid during a natural disaster such as the recent Cajon Pass fires.

As input to this study, Omnitrans, VVTA, and MARTA have all expressed an interest in such an agreement.

Omnitrans' only mutual aid agreement in place is a "bus bridge" with Metrolink to cover service interruptions in nearby Metrolink service. Omnitrans is agreeable to entering into

similar such agreements with VVTA and/or MARTA, should resources be available and if costs can be reimbursed, and in August, 2015, Omnitrans, VVTA, and MARTA held initial meetings to discuss mutual aid agreements. Since Omnitrans only owns 40 foot and larger buses in the directly-operated fleet, they would have to investigate if an arrangement could be made via their contractor's cutaway fleet to provide emergency assistance to another transit agency where smaller vehicles are required based on the type and nature of the incident and passengers involved.

#### Analysis

The focus of this strategy involves a Mutual Aid MOU between Omnitrans and VVTA, and between Omnitrans and MARTA. Past incidents have occurred where VVTA and MARTA had to seek assistance from a third party, in areas within the Omnitrans service area. Both VVTA and MARTA have identified that within the past 5 years, there has been a need for tow truck assistance, vehicle storage, installation of temporary signage, as well as road call and supervisorial assistance involving a passenger injury within the Omnitrans service area. Recent major fires in the County raise the potential for other types of mutual aid.

#### Conclusion

Omnitrans is amenable to providing Mutual Aid services to VVTA and MARTA, on a cost reimbursement basis. An MOU has been drafted that can serve as a template for these agencies should all parties agree to the scope of services that may be provided and other terms and conditions (see Appendix D). A Mutual Aid MOU execution is highly dependent upon Omnitrans having the appropriate staff and equipment available when needed, as well as a mechanism to track the staff's time and expenses by incident and to invoice the "purchaser" for the services. Should Omnitrans support such situations on a cost-reimbursement basis, service losses and passenger inconveniences could be minimized. Such inter-agency agreements are common in the commuter rail sector of public transit, where extreme distances create the same challenges.

#### 5.2.3 Items without Major Cost Savings but Likely to Improve Services

#### **5.2.3.1** Inter-Agency Transfer Agreements

This strategy examines the potential for creation of additional or updated Inter-Agency Transfer Agreements among the agencies as a means to improve service coordination.

#### Strategy Approach

Ascertain the formal arrangements (if any) that are in place for passengers to transfer to an external transit agency. Develop a template Interagency Cooperative Service Agreement that could be customized based on the transfer arrangement and other conditions. Formalizing and clarifying these arrangements will assist the agencies and customers alike and may result in a slight increase in revenue.

Omnitrans has transfer agreements/arrangements with the following providers:

- Foothill Transit;
- LA Metro (only accept passes from the Pomona Transcenter);
- OCTA (only accept passes going to or coming from Chino Transit Center);
- Riverside Transit Agency (RTA) (all routes and transfers are honored; however, not valid on Access or premium service);
- MARTA (from point of contact);
- Metrolink transfer on connecting routes only (1-way Metrolink ticket is good for one free Omnitrans ride when departing Metrolink station, and a roundtrip Metrolink ticket is valid as a transfer for bus service to and from Metrolink);
- In addition, these providers accept Omnitrans' Fare Media: Foothill, OCTA, MARTA, RTA with same provisions above;

VVTA has transfer agreements/arrangements with the following providers:

- Omnitrans transfers;
- Barstow Area Transit (BAT) transfers which also allow VVTA transfers between BAT's "City Fixed Route" service and VVTA's "B-V Link" service; and
- Agreements with Inland Regional Center for subscription service, National Training Center (NTC), Fort Irwin for on-base shuttle, a Victor Valley College Project "Ram Pass," and an agreement to operate BAT services.

MBTA has transfer agreements/arrangements with the following entities:

- Cooperative service agreement with Sunline Transit, with no reciprocal fare component.
- Agreement with Copper Mountain College for \$20,000 in a reduced fare subsidy for college students.

MARTA has transfer agreements/arrangements with the following entities:

- Transfer agreements with Omnitrans. For Omnitrans tickets, MARTA honors \$1.00 off the cash fare for transfers to MARTA's "Off-the-Mountain" service.
- Transfer agreement with Metrolink. For Metrolink tickets, MARTA honors \$1.00 off the cash fare for transfers to MARTA's "Off-the-Mountain" service.
- Voucher agreements with the school district, a women's shelter private nonprofit, Crest Forest Senior Center, Bear Valley & Mountain Community Hospitals.
- Advance monthly pass purchase agreements with San Bernardino County Probation/HSS Auditing/Department of Aging, Career Institute, RIM USD, Lutheran Social Services, and Century 21.

#### Analysis

There is sufficient inter-agency transfer activity that a standardized transfer agreement template would be of assistance. In many cases, the transfer agreements are more than 10 years old and the transit agencies may desire to revisit these older agreements. In addition, when the SANBAG Redlands Passenger Rail Project is in operation, this template would be of use for transfers between this service and Omnitrans, Metrolink, and MARTA.

#### Conclusion

An Interagency Transfer Agreement template has been drafted that can serve as a template for these agencies should involved parties agree to the transfer arrangement, reimbursement and other terms and conditions (see Appendix D).

#### 5.2.3.2 Service Planning and Data Analysis Expertise

This strategy explores the potential need for providing service planning and/or data analysis services between agencies.

#### Strategy Approach

Ascertain specific types, needs and timing of service planning and data analysis assistance. With additional service planning and data analysis expertise, service quality may improve and contribute to an increase in customer satisfaction. In addition, existing "non planning" staff who perform these functions are free to focus their time on other duties.

SANBAG has a license for TransTrack (\$13,000 a year) which is the only transit software utilized in-house, mostly for monitoring transit agency performance. The Planning Department employs five staff. The Transit and Passenger Rail Department staff respond to transit agency questions on service planning, most often as a result of short range transit plan (SRTP) or comprehensive operational analysis (COA) review, or other special studies. SANBAG retains consultants on a project-by-project basis when service planning or data analysis needs are required.

Omnitrans has 2.25 FTEs for FY14 dedicated to Service Planning, and is scheduled to reduce this staffing level to 2 FTEs in FY15. Approximately 8,320 hours agency-wide were estimated to be dedicated to Data Analysis, although this is very difficult to quantify since this is a function of many positions. There are no contract costs associated with either function. Omnitrans has a variety of in-house staff that provide service planning scheduling and reporting services:

- One Director of Marketing and Planning position, overseeing 1) Development Planning and 2) Service Planning, as well as Marketing programs.
- One Planning & Scheduling Manager: Leads short range planning, route design and scheduling, and leads all ridership data analysis. Manages service coordination and fare reciprocity agreements with other transit agencies. Oversees the tasks listed below that are completed by the Planner and the Administrative Secretary.

- One Planner: Responsible for Title VI and Limited English Proficiency (LEP) planning, analysis, and compliance; updates of Emergency Service Deployment Plan; geographic information system (GIS) analysis and mapping; route performance monitoring; and other data reporting and analysis tasks.
- One Planning Project Manager: Leads future bus rapid transit corridor planning and long-range planning in coordination with SANBAG and regional agencies.
- Stops and Stations Supervisor: Supervises changes and improvements to transit stops.
- Two Scheduling Analysts: Conduct transit scheduling tasks.
- Two Interns: Assist with field research, route monitoring, surveying, data analysis, GIS mapping, as needed and directed.

Omnitrans conducts three services changes each year, with minor changes occurring in January and May, and a major change in September as part of the annual service plan and budgeting process. Omnitrans conducts service/route analysis on an ongoing basis; however, staff focus their efforts on the specific service changes two and a half months prior to the actual service change.

VVTA estimates that in-house staff dedicate 800 hours each fiscal year towards service planning and data analysis. There are no contract costs associated with these functions. There are no dedicated or designated planning staff, as several staff across the agency contribute to planning and analysis efforts, including: Executive Director, Deputy Director, Senior Customer Service and Contract Compliance Officer. There is not sufficient dedicated planning staff to routinely monitor for routes/route segments with schedule or capacity problems or service underutilization. In many cases plans may be reactive rather than proactive. Specifics on planning/analysis functions, include:

- For large scale operational analysis, studies, long range planning, those are performed by consultants, with the support of Technical Advisory Committee members and key Administrative staff.
- Implementation and ongoing support of the SRTP is provided by the operations contractor, Transdev, as well as several key administration staff including the Contract Compliance Officer, Senior Customer Service, ITS, Deputy Director, Executive Director.
- Ongoing route planning is performed on an as-needed basis by the Contract Compliance Officer, Senior Customer Service, and Executive Director and is coordinated with the contractor who also provides input.
- VVTA conducts annual unmet needs hearings in the fall with SANBAG (onboard notices, media releases and other public notices).
- A COA is conducted every five years and the FTA Triennial is every three years, performed by outside consultants.

- Bus and operator scheduling is performed by the operations contractor. Tactical transit planning is handled by the Executive and Deputy Director. Capital planning is handled by the Fleet and Facilities Director and the Deputy Director.
- Passenger amenity planning is coordinated with the member jurisdictions (owners and maintainers of amenities) and coordinated by the Contract Compliance Officer.
- On time performance is evaluated by Global Positioning System/Automatic Vehicle Locator (GPS/AVL) system, as well as field supervision.

VVTA does not have routine or scheduled service change periods each year, and most service changes are enacted as result of COA recommendations or as needed. In the past the most substantial service change periods have been in either February or in July. Due to an increase in ridership and area traffic congestion, VVTA has considered a complete overhaul of the system including re-locating key transfer points.

MBTA estimates that 15 percent of the General Manager's and Operations Manager's time is devoted to these services, and for FY14 the cost will be \$25,000. There are no contract costs associated with these functions. This function is accomplished through these staff:

- The General Manager and Operations Manager provide service planning, route changes, public notices, evaluation of existing service conditions.
- Performance standards are developed internally, data gathered through TransTrack and reported Quarterly to the board.
- Conduct unmet needs hearings in fall with SANBAG (onboard notices, media releases and other public notices).
- A COA is conducted every five years and the FTA Triennial is every three years, performed by outside consultants.
- Feedback is evaluated based on cost efficiency and productivity, and discussed/evaluated with SANBAG and in house consultants (AMMA).
- Gather ridership data through surveys and onboard trip sheets from drivers (entered into TransTrack).
- Field Supervisors monitor onboard performance and enter into an excel spreadsheet.

MBTA does not have routine/scheduled service change periods each year, and in the past changes have most often occurred in July. Staff requires a six-month planning period to prepare for service changes, unless there are additional Title VI requirements or elements in the proposed change (then a longer period is required). Types of assistance identified include a biennial or triennial service check, as well as ongoing bus stop evaluation.

MARTA's in-house cost for service planning and data analysis for FY 14 is approximately \$23,000. There are no contract costs associated with these functions. How specific activities are accomplished, includes:

- The General Manager performs route planning, long range planning and implements the SRTP.
- On a daily basis, ridership data is obtained and reported by the drivers (no Automatic Passenger Counters [ APCs]). The data is reviewed daily and entered into TransTrack, for analysis of route capacity problems or service under-utilization. Bus stop boarding levels are not automatically available, however; for planning purposes, as determined necessary, counts are done.
- On a monthly basis this data is evaluated, analyzed, and reported to the board along with possible explanations for operating above or below expectations.
- On time performance is obtained daily by dispatchers as drivers call in via the radio and report bus stop arrival/departure of key time points. Data is entered into spreadsheets which summarize the on time performance of each route and overall performance. In addition, dispatchers are able to monitor the buses on a live webbased system (AVL).
- Utilize excel for scheduling DAR appointment, and use TransTrack for data input and reporting.
- Although buses are tracked via an AVL system, the agency does not use scheduling software.

MARTA analyzes their routes and schedules annually, most often in the spring or as needed to accommodate unexpected changes (such as a removal of a bus stop, or traffic flow changes). Due to the heavy traffic flow in the summer and winter, service changes planned for the spring allows MARTA sufficient time to test and evaluate the service in advance of the busy summer season. Approximately a two month period is needed prior to a service change to properly notify drivers, riders and the community.

The City of Needles estimates that the in-house hours are 160 for each fiscal year, and are included in a contract agreement with transit contractor. The City of Needles' Services Manager is responsible for planning all service and estimates that 1/10th of her time is spent on transit issues in total. The City of Needles utilizes TransTrack for data tracking and reporting.

#### Analysis

Only Omnitrans has dedicated staff within the Planning/Scheduling function, to review schedules, perform short term planning and adjustments, and conduct ridership and data analysis. SANBAG does not have in-house staff available in this area. At the other transit agencies, data analysis is performed by multiple positions across the agency. Several of the smaller agencies indicated a desire for service planning support so that service problems could be addressed in a more timely manner than once every 5 years when a new COA or SRTP is written.

Omnitrans and VVTA both have registering fareboxes that count fares and ridership by trip, and APCs on at least a portion of their fleets to obtain ridership by bus stop/location. At the smaller agencies, drivers count ridership manually, or, for dial-a-ride service, it

may come from trip manifests. For the City of Needles, the contractor's local manager is responsible for on-time performance monitoring on that system.

Omnitrans and VVTA both have GPS/AVL on-board their buses (though from two different vendors) which produce automated on-time performance reports by route for evaluation by staff. Field supervisors supplement this data with field observations. The smaller agencies must rely on field supervision and/or radio calls from their drivers to determine on-time performance.

#### Conclusion

Methods for obtaining ridership, on-time performance, and other data gathering efforts that lead to monitoring and improving the systems vary greatly at each agency. How or when the data is analyzed and compared against agency standards, varies as well. All agencies have identified goals, objectives, and service standards in their most recent SRTP or COA. However, the smaller agencies may be measuring service performance against these standards on a quarterly or, perhaps, annual basis, rather than monthly. This again reflects the lack of dedicated service planning staff.

Omnitrans indicated they would be willing to consider becoming a "provider" of these services if appropriate cost reimbursements could be worked out and if the need is either small enough to fit within current staffing workloads or large enough to justify additional staffing. The other transit agencies may be interested in procuring from Omnitrans, but are concerned whether the assistance would be available when needed. Another concern was Omnitrans' unfamiliarity with planning and scheduling service in rural communities.

SANBAG is willing to provide services through their on-call consultants. A Cooperative Agreement has been drafted that can serve as a template when a "purchasing" transit agency has service planning/data analysis needs and all parties agree to a scope of work and budget (see Appendix D). Another suggestion was for SANBAG to form a service planning efficiency-working group with consultant assistance, to seek out issues and common solutions from the group.

#### **5.2.3.3** Grant Application Assistance

A strategy identified during the Transit Agency Functional Assessment was the possibility of staff and/or consultant assistance in preparing grant submittals, in non-competitive grant pursuits.

#### Strategy Approach

Ascertain types, needs and timing of non-competitive grant submittals and determine if there is the possibility of one or more of the agencies providing these services either through in-house staff or consultants. Given the lack of resources at the smaller agencies, providing grant application assistance in the non-competitive area is an interest expressed by many of the transit agencies.

SANBAG's grant and funding applications function is overseen by the Fund Administration department.

Omnitrans utilizes in-house staff to provide this function, at 530 hours across all fiscal years (0.25 FTE each fiscal year). There are no contract costs associated with this function. The in-house staff that provide support to the grant function are primarily finance staff, including the following positions: Treasury Manager, Director of Finance, Accounting Manager, and Senior Financial Analyst.

VVTA utilizes in-house staff to provide this function at 577 hours each fiscal year (0.27 FTE each fiscal year). There are no contract costs associated with this function. The Executive Director and Deputy Director/Grants oversee all grant activities. The Deputy Director/Grants is primarily responsible for the grant application compilation, compliance and reporting; the Finance/Accounting Controller is responsible for the accounting/tracking of grants.

MBTA utilizes in-house staff at 30 percent of the General Manager and Office Manager fully burdened salary, and for FY 14 that cost is \$56,000. There are no contract costs associated with this function. The General Manager provides financial oversight and grant submissions, as well as FTA/Caltrans interface. The Office Manager also assists with grant submittals.

MARTA utilizes in-house staff for this function, and for FY 14, that cost is \$55,000. There are no contract costs associated with this function. The General Manager compiles all grant applications and monitors the grant funding and reporting. The Administrative Assistant also assists with grant reporting.

The City of Needles in-house hours are estimated to be 60 hours each fiscal year and there are no contract costs associated with this function. The City of Needles staff state that they would consider "purchasing" grant staff and assistance from others as applicable and appropriate.

VTrans did not identify any in-house or contract costs associated with this function. The Agency receives FTA Section 5316 & 5317 funding through a sub-recipient agreement with one of the transit agencies, and the Administrative Manager and Chief Executive Officer are responsible for grants management and reporting.

#### Analysis

Both MBTA and Omnitrans offered to provide these services to other interested transit agencies, on a cost reimbursement basis and based on staff availability. No agency has dedicated, full time Grants Staff and instead, all agencies provide this function through a combination of in-house staff that have other responsibilities/duties. Therefore, implementation of a Cooperative Agreement arrangement for these services is not likely to result in a reduction in direct costs, as existing staff's time will be taken up quickly by many other duties. Any "providing" agency must have the right/appropriate/experienced staff available when needed, as well as a mechanism to track the staff's time on the project and invoice the "purchaser" for the services. It appeared that the most onerous component of any grant is the upfront activity of grant development, writing, budget development and submittal, which seems to occur most often in the late fall and spring.

Some transit agencies were concerned about "purchasing" this service from another transit agency, due to possible competing interests and deadlines. Most seemed more comfortable to "purchase" services through a SANBAG consultant. Even though it was agreed that this strategy would consider only non-competitive grants, some agencies stated that it is the competitive grants (that are out of cycle with short application deadlines) where the most assistance is needed. All agreed that the most difficult part of this function is the grant and application development, cost estimates and packaging the grant for submittal. All agencies were interested in additional grant application, submittal and reporting training opportunities provided on a joint or regional level.

#### Conclusion

Both MBTA and Omnitrans are amenable to providing project grant assistance to interested transit agencies, on a cost reimbursement basis. In addition, SANBAG is amenable to providing these services through their on-call consultant teams. A Cooperative Agreement has been drafted that can serve as a template when a "purchasing" transit agency has the need and all parties agree to a scope of work and budget (see Appendix D). In addition there may be joint training opportunities through the FTA, APTA, California Transit Association (CTA), National Transit Institute (NTI), CalACT, FTA's Rural Transit Assistance Program (RTAP), or other organizations that the agencies and/or SANBAG can coordinate and provide.

#### 5.2.3.4 Civil Rights Compliance Assistance

This strategy explores the potential need for combined assistance in the area of Civil Rights Compliance among the transit operators, specifically Title VI requirements.

#### Strategy Approach

Review current staff level and efforts at existing agencies, develop a schedule of specific needs and assistance and determine which agency may be able to provide such services, or if SANBAG would be willing to hire a consultant to assist in the variety of efforts, as needed.

Omnitrans estimates 310 hours of in-house staff for each fiscal year (0.15 FTE). There are no contract costs associated with this function. Omnitrans' next update of their Title VI plan is due in October 2015. Omnitrans is in compliance with FTA guidelines and completes a Title VI analysis for major service changes and fare changes as part of the planning process to ensure compliance. Omnitrans also has a Title VI compliance policy and process that spells out the steps for evaluating impacts and complaints, which are reviewed by the Planning Department. Staff involved are responsible for impact review and all Title VI Reporting and Analysis requirements (Triennial, Fare Equity and Service Equity Reporting). Staff positions include:

- Planner I is responsible for writing/updating Title VI plan and LEP Plan; analyzing proposed service changes for compliance with Title VI.
- Planning and Scheduling Manager is responsible for Overseeing Title VI analysis done by Planner I and coordinating with other departments to ensure Title VI and LEP requirements are complied with.

VVTA is below the threshold for preparing a complete Title VI study for every fare and service change, as they have less than 50 peak fixed route vehicles. However, VVTA is required to consider the Environmental Justice aspect of any service change or improvement. Until very recently all Title VI duties including writing the compliance policy fell on the Executive Director. This function is now being performed by the Marketing/Civil Rights Manager. In addition, a VVTA Civil Rights Coordinator is being trained to absorb some of the Manager's duties. VVTA's most recent Title VI plan was submitted in April 2015, and VVTA.

MBTA estimates in-house costs are approximately \$10,000 for FY 14 and include five percent of the fully burdened salary of the General Manager and the Operations Manager. There are no contract costs associated with this function. The Operations Manager is the Agency's Title VI Compliance Officer.

VTrans did not identify any in-house or contract costs associated with this function. The Agency has a Title VI policy in place but does not have a requirement to submit the plan to any particular agency because of their sub-recipient funding status. However, VTrans is required to submit their plan upon request to those agencies with whom they are a sub-recipient, e.g., Omnitrans, VVTA, and Caltrans. VTrans does not have a designated compliance officer.

#### Analysis

Title VI procedures varied widely at the transit agencies and may be a result of the lack of dedicated staff as well as the wide range in agency size. SANBAG in the past has used its consultants to help the smaller agencies create a Title VI program. Based on Omnitrans' estimated hours dedicated to this function, Omnitrans may not have sufficient staff to become a "provider" of this type of service, unless it was sufficient to hire a full time/dedicated staff. More appropriate may be for SANBAG to continue to utilize an oncall consultant to provide this expertise as needed. Since SANBAG recently provided a consultant to update the Title VI plans of the smaller agencies, it appears that a role that SANBAG may play in the future is to keep the agencies abreast of changes as well as to provide training.

#### Conclusion

Since state and FTA Civil Rights requirements are similar if not identical for all transit agencies, a coordinated effort lead by a SANBAG consultant is reasonable and most of the agencies were interested in such an effort. Training, plan analysis, templates and reports could be developed and could assist in reducing the work of existing staff, as well as to ensure state and federal compliance with an expected reduction in issues and scrutiny, and with an outcome of improved compliance. Another suggestion was for SANBAG to take the lead on regional surveys or a survey template; however, those surveys would have to be augmented with additional questions to satisfy the individual service area and unique issues. Omnitrans and VVTA may be able to provide documents, templates, and reports as examples for the smaller agencies, as needed. A Cooperative Agreement has been drafted that can serve as a template for when a "purchasing" transit agency has the need and SANBAG can deploy an on-call consultant to assist (see Appendix D).

#### **5.2.3.5** Training/Staff Development

This strategy involves joint training and staff development opportunities for San Bernardino County transit agencies.

#### **Strategy Options**

Virtually all the transit agencies were supportive of improved coordination on training and staff development opportunities. There are several ways that this can be organized for the agencies:

**Industry Training Opportunities** - The NTI provides a wide array of training courses in the following program areas, which would be appropriate for transit staff who work in these areas:

- Advanced Technologies
- Management Development
- Procurement
- Grant Monitoring and Reporting
- Multimodal Transportation
- Planning
- Transit Program
- Management and Compliance
- Workplace Safety and Security

Furthermore, FTA Section 5307, 5311, and 5309 funds can used for tuition and direct educational expenses for transportation employees for educational and training programs relating to transit, at a federal share not to exceed 80 percent. If enough participants are identified, courses could potentially be sponsored in San Bernardino County. NTI also offers training material in webinars, eliminating travel cost concerns.

In addition to NTI, the FTA, CTA, California Association for Coordinated Transportation, and APTA all sponsor conferences or training programs which offer opportunities for transit agency staff.

<u>**Transit Agency or SANBAG-Sponsored Training**</u> – Omnitrans has significant staff depth in procurement, an area involved in several of the cost-savings strategies reviewed in this study, and has offered joint training opportunities in the past to the other transit agencies. This is a low-cost opportunity which the agencies should consider.

Possibly such training sessions could be incorporated into the bi-monthly SANBAG Public and Specialized Transportation Advisory and Coordination Council (PASTACC) meetings, to reduce travel time and cost burdens for the transit agencies. PASTACC is the SANBAG-sponsored advisory body established under the California Transportation Development Act §99238. In San Bernardino County, PASTACC brings together public transit operators and social service transportation providers to discuss the mobility issues and challenges that confront seniors, persons with disabilities or persons of limited means<sup>10</sup>.

SANBAG and Omnitrans may want to consider preparation of a "look ahead" training schedule where timely topics for review with the transit agencies are scheduled over the following year, allowing the transit agencies to plan well in advance for required travel.

### 5.3 Financial Review Conclusions

Based on the previous review and analysis of cost-saving and coordination strategies, the following discussion summarizes the strategies with potential for significant transit agency cost savings:

**Bus Procurement** – On-going use of the CalACT/MBTA bus purchasing program offers significant capital cost savings for future bus procurement for all agencies. Full-size bus procurements can also benefit from combined procurements with other transit agencies outside San Bernardino County, such as Omnitrans and VVTA continue to do.

**ADA Certification Process** – Improvements in ADA certification processes offer potentially significant ADA program cost savings to Omnitrans. Far smaller savings were found for MARTA, and, given the small number of new applicants received annually, probably does not make a change in procedure cost-effective.

**ADA Use of Taxis** – This strategy could result in significant savings for Omnitrans, VVTA, and MARTA if a <u>taxi-voucher program</u> similar to that being developed by VTrans is employed (i.e., where the passenger pays half the taxi fare, not just the ADA paratransit fare), and adequate taxi company resources are available in each operator's service area. Substitution of taxis in the <u>absence</u> of a voucher program (i.e., passenger pays only the ADA paratransit fare) showed limited savings for VVTA and MARTA and could potentially cost more than Omnitrans' cost for the same trips. However, Omnitrans' new contract for ADA paratransit services with MV Transportation calls for the use of taxis for unproductive trips such as late-night and weekend service, to afford the agency some savings.

**Bus Heavy Overhaul/Repair** – This strategy showed potentially significant savings through combined purchasing for Omnitrans, with more limited savings for VVTA, MBTA, and MARTA.

**Bus Parts Procurement** – Omnitrans and VVTA could potentially benefit from combined bus parts procurement; however, VVTA would need to weigh this against the savings they obtain through the volume purchasing contracts of their contract operator.

**Tire Contracts** – Omnitrans, VVTA, and MARTA were estimated to realize relatively small cost savings through combined tire contracting; to pursue this strategy, VVTA

<sup>&</sup>lt;sup>10</sup> Per SANBAG Website, accessed 1-28-15.

would need to change from tire purchasing to tire leasing, which may not be worth the relatively small savings.

**CNG Fuel Procurement** – This strategy potentially could save the participating agencies (Omnitrans, VVTA, and MBTA) a combined \$1.3 million over a 4-year period, depending on the pooled price per GGE achieved; however, to realize these savings, at least one of Omnitrans' yards would need to convert from LCNG to CNG.

**CNG Conversion at Omnitrans West Valley Yard** – As with the previous strategy, this area potentially could save Omnitrans significant operating dollars, depending on the price per GGE achieved. If both Omnitrans yards are converted to CNG, potential operating cost savings could be up to three times the estimates in this study for conversion of the West Valley Yard only. Operating savings payback of the capital cost of the new CNG facility could occur in as little as 8 years or as long as 40 years for the West Valley Yard, but about half that payback time for the East Valley Yard, again depending on GGE rates. The capital cost would likely be covered 80 percent by an FTA capital grant, with the operating cost savings accruing to the harder-to-find operating funds.

**CNG Station Maintenance** – This area could result in some savings for Omnitrans, VVTA, and MBTA. However, due to the timing and scopes of the current contracts, and little industry information on savings available for this activity, potential savings are unknown. Sole sourcing this activity to an existing Omnitrans or VVTA provider may not be allowable under FTA procurement rules; however, this can be pursued through a joint procurement. Omnitrans is scheduled to re-procure this service in FY 2016.

The other strategies reviewed in this study offer the potential for improved services and operations, though not necessarily cost savings. Draft inter-agency agreement templates have been developed and are provided in Appendix D for agencies to use as a starting point in coordinating efforts in the areas of:

- Project Development/Construction Management
- Regional Marketing
- Mutual Aid Agreements
- Inter-Agency Transfer Agreements
- Service Planning/Data Analysis Assistance
- Grant Application Assistance
- Civil Rights Compliance Assistance
- Training/Staff Development

### THIS PAGE INTENTIONALLY LEFT BLANK

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

# Appendix A References

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

### THIS PAGE INTENTIONALLY LEFT BLANK
- ADARide. 2014. ADARide.com "Frequently Asked Questions." Accessed December 16, 2014.
- Barstow Area Transit (BAT). 2014. BAT Fares. Accessed March 2014 at: http://www.barstowca.org/index.php/fares.
- Center for Urban Transportation Research (CUTR). 2013. University of South Florida. April 2013. Quantifying the Benefits of the Florida Transit Research Inspection Procurement Services (TRIPS) Program. Final Report.
- Federal Transit Administration (FTA). 2010. Report to Congress on the Results of the Cooperative Procurement Pilot Program. April 2010.
- Federal Transit Administration (FTA). 2012. FTA Circular C 4702.1B: Title VI Requirements and Guidelines for Federal Transit Administration Recipients.
- Friedman, D. and DeCorla-Souza, K. 2012. *Guidebook for Evaluating Fuel Purchasing Strategies for Public Transit Agencies*. Washington, DC, Transportation Research Board.
- Jacksonville Transportation Authority (JTA). 2013. Meeting Minutes of the Board of Directors' Monthly Meeting. December 5, 2013.
- Morongo Basin Transit Authority (MBTA). 2012. *MBTA 2012 Comprehensive Operational Analysis*. Prepared by Moore & Associates for MBTA.
- Morongo Basin Transit Authority (MBTA). 2014. *A "Fair Fare" for MBTA*. Accessed May 2014 at: http://www.mbtabus.com/FairFare.pdf.
- Mountain Area Regional Transit Authority (MARTA). 2012. *MARTA 2012-2016 Short Range Transit Plan (SRTP).* Prepared by Transit Marketing and Mobility Planners for MARTA. May 2012.
- Mountain Area Regional Transit Authority (MARTA). 2014. MARTA Fares. Accessed March 2014 at: http://www.marta.cc/index.html.
- National Transit Database (NTD). 2012. 2012 Agency Profiles. Accessed March 2014 at: http://www.ntdprogram.gov/ntdprogram/.
- Needles, City of. 2014a. Request for Proposals to Enter into Contract Services to Provide Operations of a Local Route Deviation Transit Service
- Needles, City of. 2014b. Draft Needles Transit Services Short Range Transit Plan (SRTP) 2014-2018.
- Omnitrans. 2014a. Omnitrans Fares/Passes. Accessed March 2014 at: http://www.omnitrans.org/fares-passes/.

Omnitrans. 2014b. OmniConnects: Connecting People, Business, and Community. FY2015-2020 Short-Range Transit Plan. May, 2014.

Omnitrans. 2014c. Omnitrans Management Plan, Fiscal Year 2014-2015.

- Ramirez, J. 2014. Greater Phoenix Regional Joint Bus Procurement. Presentation at the American Public Transportation Association Annual Meeting. October 2014.
- San Bernardino Associated Governments (SANBAG). 2007. Public Transit-Human Services Transportation Coordination Plan for San Bernardino County.
- San Bernardino Associated Governments (SANBAG). 2009a. Operational Analysis of Barstow Area Transit. Prepared for SANBAG by AECOM Transportation. May 2009.
- San Bernardino Associated Governments (SANBAG). 2009b. San Bernardino County Long Range Transit Plan.
- San Bernardino Associated Governments (SANBAG). 2012a. *Measure I 2010 2040 Ten Year Delivery Plan.* January 2012.
- San Bernardino Associated Governments (SANBAG). 2012b. Redlands Passenger Rail Project Draft Environmental Impact Statement/Draft Environmental Report – Public Scoping Meeting. September 2012.
- San Bernardino Associated Governments (SANBAG). 2013. Annual Budget Fiscal Year 2013/2014. June 5, 2013.
- San Bernardino Associated Governments (SANBAG). 2014a. *Transit Agency Functional Assessment Questionnaire*. (Prepared for, submitted to and completed by all San Bernardino County Transit agencies for this study.)
- San Bernardino Associated Governments (SANBAG). 2014b. *Measure I 2010-2040 Ten* year Delivery Plan 2014 Update.
- Shaw, Josh. 2014. Interview and correspondence with Cliff Henke. September 2014.
- Transit Cooperative Research Program (TCRP). 2012. *TCRP Report 156: Guidebook* for Evaluating Fuel Purchasing Strategies for Public Transit Agencies. Transportation Research Board, Washington, D.C., 2012.
- U.S. Census. 2014. State and County QuickFacts. Accessed March 2014 at: http://quickfacts.census.gov/qfd/index.html#
- U.S. Department of Energy. 2014. Clean Cities Alternative Fuel Price Report. January 2014.
- Valley Transportation Services (VTrans). 2014. VTrans Strategic Plan Update for FY 2014/15 through FY 2018-19. May, 2014.

- Victor Valley Transit Authority (VVTA). 2013. Comprehensive Operational Analysis (COA) and Short Range Transit Plan (SRTP) of VVTA. Prepared by AECOM Transportation for VVTA.
- Victor Valley Transit Authority (VVTA). 2014. VVTA Fares. Accessed March 2014 at: http://www.vvta.org/local.html#cashfares.

THIS PAGE INTENTIONALLY LEFT BLANK

# Appendix B Questionnaire

# THIS PAGE INTENTIONALLY LEFT BLANK





# SANBAG County-Wide Transit Efficiency Study Transit Agency Functional Assessment Questionnaire

Dear Transit Agency Colleague:

The Transit Agency Functional Assessment Questionnaire is designed to gather information on how each agency functionally organizes and provides its transit services. By gathering this information, the consultant team will be able to identify areas of commonality in the functions among the agencies, and identify areas of potential efficiency improvement through coordination or optimization of functions.

The Questionnaire is organized into six overall areas: A) Agency Overview; B) Current Transit Services Provided; C) Service Planning; D) Operations and Administrative Support Functions; E) Management Information Systems/Information Technology; and F) Fixed-Asset Review. We have included focused questions on the Service Planning function in order to gather information on the related SANBAG Short-Range Transit Plan project and combine information gathering efforts for maximum efficiency.

Each question has a text box which automatically expands to accommodate your responses. Those text boxes containing a table to fill out will add rows by tabbing in the bottom right cell of the table. We realize there is wide variation in agency size and services provided among the seven agencies in San Bernardino County. If a particular question covers an area that does not apply for your agency, please feel free to simply enter "N/A" in the text box and move to the next question.

By reviewing and, to the extent possible, completing this Questionnaire in advance of the consultant team's site visit, we can help focus our interviews and make the best use of your time.

Thank you in advance for your assistance.

A. Agency Overview:

1. Please provide your official agency name and describe your jurisdictional area or areas, cities, or communities served.

# 2. Please provide the year transit service was initiated by your agency.

# PARSONS BRINCKERHOFF



3. Please provide a brief description of service modes provided (e.g, fixed-route, ADA Paratransit, etc.), and the annual ridership for each mode for the most recent complete fiscal year available.

Transit Mode	Annual Ridership

4. Please describe your governance system – the makeup of your Board of Directors, how they are selected/assigned, and describe the legislative authority or Agency Agreements establishing the agency (e.g., Senate Bill SB XXX or Joint Powers Agreement between XX and YY).

5. Please describe the policy setting role or level of authority your Board has (e.g., can your Board set and adjust transit fares, approve the budget, approve service changes, submit federal and state grant applications, etc. or does another agency have approval or concurrence responsibility?)

6. Please provide (separately) a functional Organization Chart as well as one identifying specific personnel/positions if available.

7. Please provide (separately) electronic copies of your annual budget and capital improvement programs for the last two fiscal years.

8. Please summarize your major funding sources and provide the percentage of your annual operating budget, and capital improvement program budget, that these funding sources constitute.

# Operating Budget:

Funding Source:	FY13 -14 Budgeted Amount	Percent of Total Operating
(For FTA funds, include Section No.)		Budget





Capital Improvement Program Budget:

Funding Source:	FY13 -14 Budgeted Amount	Percent of Total Capital
(For FTA funds, include Section No.)		Budget

9. Please describe any functional areas or activities in which you are currently coordinating with another transit agency or SANBAG for budgeted functions (e.g., procurement(s), vehicle acquisitions, service contracts, fuel purchase agreements, etc.).

Agency Coordinating with:	Activity/Function Coordinated:	

10. Please describe any functional areas or activities for which you are not coordinating now but have recommendations for coordination, optimization, or transfer of functions.





B. Current Transit Services Provided:

1. Please provide details on the number of fixed routes, demand response services, other services, spans of service, etc., by type of service. A separate table from the SRTP can be sent if desired.

Mode	Number of Routes/Services	Weekday, Saturday, and Sunday Spans of Service Hours

2. Please describe any general system design or concepts on which your transit system is based, e.g., is it a downtown-focused "hub and spoke" system, a timed-transfer system with multiple nodes/transfer points, a community dial-a-ride operation, a grid-system design, etc.

3. Please provide a general description of the service frequencies of your system. For example, do most routes operate all day on the same headway or do you have peak/off peak service frequencies? Does your system operate essentially a base level of service all day or is there a significant peak to base ratio of bus pull-outs/pull-ins?

4. Please describe how and where your dispatch operation is conducted. Is it a 24-hour a day operation or does dispatch shut down at some time(s) during the day or night?

5. For each of the transit service types provided (such as fixed-route, ADA Paratransit, etc.) please describe whether the service is directly operated by agency personnel or contracted to a private contractor or another agency. If contracted, please provide the contracting firm's name.

6. If any of transit services are directly-operated, please indicate whether the operating employees and/or administrative employees are represented, and if so, by what labor union(s).

Service/Mode:	Employee Unit	Represented? What Union?





7. Please describe any existing agreements or arrangement your system has with other transit agencies for coordination of services, such as schedules, connection points, acceptance of transfers, etc. Also, please identify any arrangements/locations for passengers to pre-purchase fares/passes.

Transit Agencies Coordinated	Nature of the Coordination	Locations for Pre-
with on Fares or Transfers		Purchasing Fares/Passes

8. Do you have any special purchased transportation arrangements with employers or other entities (for example, educational facilities, private non-profit agencies, or medical providers), who provide some kind of subsidy or financial support for service provision? Advance monthly pass purchase programs by schools/colleges or private entities might also fit in this category.

Agreement with (agency, firm, entity):	Nature of Agreement:

Americans with Disabilities (ADA) Service Questions:

9. If your agency offers ADA Paratransit service, what service delivery method is used? For example, is service provided by assigned vehicles and drivers using daily trip itineraries, or is the service provided via on-call taxis or other private independent transportation providers?

10. If service is operated using assigned vehicles, has your agency considered using taxis during early/late hours of the service day when demand is low, to reduce costs?

11. If your agency offers ADA Paratransit service, what is the process for passengers to obtain certification? Is a statement by a medical provider required? Is the certification process conducted inhouse or sub-contracted to another firm?

12. Has your agency conducted any reviews or audits of the ADA Certification process to ensure that only passengers who qualify under your rules are being certified?





C. Service Planning:

1. How is the service planning function organized and staffed? Who serves this role, and if dedicated/full time staff, how many service planners does your agency have? Do they also conduct long-range planning? Please provide employee position titles, number of employees, and a brief description of responsibilities.

Planning/Applicable Position Title	# of Employees	Position Responsibilities

2. Please provide a general discussion of the planning responsibilities handled by the assigned staff or by the Planning Department, e.g., route planning, bus and operator scheduling, bus service "shakeup" planning, long-range planning, development review for transit impacts, etc. Is scheduling handled within Planning or within Operations?

3. Does your agency's Short Range Transit Plan (SRTP) include an annual process for evaluating the performance of your transit services against adopted service goals, objectives, and standards? Are those goals, objectives, and standards identified in your SRTP? Do you have specific performance standards for different types of service, such as express routes, local routes, dial-a-rides, etc.?

4. Please describe your method of evaluating transit service performance and rating services as operating above or below standards.

5. Does your annual service performance evaluation identify service deficiencies? Are there other processes by which service deficiencies are identified, e.g., through public hearings or outreach activities?

6. How do the service needs and deficiencies identified through the evaluation process influence or affect service improvement proposals?

7. Please describe the public participation process that was conducted for the review and adoption of your most recent Short-Range Transit Plan and/or other public outreach activities on service needs.

# PARSONS BRINCKERHOFF



8. How are fares set and adjusted for your transit services? Is there a process for periodically reviewing fare levels and farebox recovery ratios and recommending adjustments?

9. How is ridership data for your system obtained? Is ridership counted through the farebox on a daily basis, by route and run? Are automatic passenger counters (APCs) used on the buses? Does the service planning staff/function/department review this data to identify routes/route segments with capacity problems or service under-utilization? Is boarding data available at the bus stop level?

10. How is on-time performance data obtained for the fixed-route system? Do you rely on field supervisor observations or use GPS/AVL data or other systems to determine on-time performance?

11. How is Title VI compliance review handled for significant service changes and fare changes? Does your agency have a Title VI compliance policy which defines significant service and fare changes and spells out the process for evaluating impacts? Who handles these reviews?





D. Operations and Administrative Support Functions:

1. Please provide the staffing levels and briefly list areas of responsibility for each of the following operations and maintenance function tables. If individuals in your organization handle multiple functions, please use the following alternative table rather than the separate functional-area tables and insert "N/A" in the function tables where applicable.

#### Alternative Table – Operations and Maintenance Areas:

Position Title	# of Employees	Functions Handled

Function Tables:

a. Operations Administration (such as Operations Managers, Transit Supervisors, Dispatchers, etc.)

Position Title	# of Employees	Responsibilities

# b. Coach Operators (counts for full- and part-time)

Position Title	# of Employees	Full- or Part-Time

# c. Vehicle Maintenance Administration (Maintenance Managers, Maintenance

Supervisors, Maintenance Trainers, etc.)

Position Title	# of Employees	Responsibilities

# d. Vehicle Maintenance Employees (Mechanics, Bus Servicers, other fleet employees)

Position Title	# of Employees	Responsibilities





# e. Facility Maintenance Administration (Facility Maintenance Managers, Facility

Position Title	# of Employees	Responsibilities

# f. Facility Maintenance Employees (Facility Technicians, Facility Craftsmen, Custodians,

etc.)

Position Title	# of Employees	Responsibilities

g. Safety and Security (Including Safety and Security Managers, Supervisors and Security Officers)

Position Title	# of Employees	Responsibilities

2. Please provide the staffing levels and briefly list areas of responsibility for each of the following administrative functions. If individuals in your organization handle multiple functions, please use the following alternative table rather than the separate functional-area tables and insert "N/A" in the function tables where applicable.

Alternative Table – Administrative Areas:

Position Title	# of Employees	Functions Handled

a. General Management/Senior Management

Position Title	# of Employees	Responsibilities





# b. Budgeting Position Title # of Employees Responsibilities


# c. Finance and Accounting

Position Title	# of Employees	Responsibilities

# d. Risk Management

Position Title	# of Employees	Responsibilities

# e. Information Technology (IT) staffing (including seconded staff from consulting firms if

#### used):

Position Title	# of Employees	Responsibilities

# f. Debt Management

Position Title	# of Employees	Responsibilities

# g. Grants Management

Position Title	# of Employees	Responsibilities

# h. Compliance (Title VI/DBE)

Position Title	# of Employees	Responsibilities





# i. Procurement – please also indicate whether you are required to follow FTA procurement guidelines due to being a federal grant recipient.

Position Title	# of Employees	Responsibilities
Federal Grant Recipient following	federal	
procurement guidelines?		

#### j. Personnel Administration and Labor Relations

Position Title	# of Employees	Responsibilities

#### k. Planning

Position Title	# of Employees	Responsibilities

# I. Capital Project Planning and Project Programming (into the Transportation Improvement Program)

Position Title	# of Employees	Responsibilities

#### m. Benefits and Retirement Program administration

Position Title	# of Employees	Responsibilities

# n. Marketing

Position Title	# of Employees	Responsibilities





#### o. Customer Service and Transit Telephone Information

Position Title	# of Employees	Responsibilities

#### p. Legal Services and Audit Services (Please indicate if contracted)

Position Title	# of Employees	Responsibilities

q. Coordinated Transportation Service Agency (CTSA) functions, such as coordinating social service agency transportation, conducting mobility training, etc.

Position Title	# of Employees	Responsibilities

r. Other functions or services provided by not listed above and/or provided by outside contractors/consultants

Position Title	# of Employees	Responsibilities

3. Please provide a general description of the benefit programs for direct employees, such as amount of paid sick leave, holiday pay, vacation pay, etc., and the retirement program in place.

Employee Group Receiving Benefit (Administrative, Coach Operators, etc.)	Benefit Type	Level of Benefits Provided (per Year), in hours, dollars or % of wages





E. Management Information Systems/Information Technology:

1. Please provide a general overview of the management information system. Do you use an Enterprise-level software system (such as JD Edwards/Oracle, SAP, IFS, etc.)? What functions are covered by your overall MIS system?

2. Does your agency have an Information Systems Master Plan or decision making process? If there is an MIS Master Plan, please provide it separately.

3. Please provide a general overview of your computer networks, hardware systems, and major software systems.

4. Please describe the major MIS systems used in each Department, by Department, and indicate what the annual license fees are, if applicable:

b. Vehicle Maintenance, including maintenance scheduling, work order generation, inventory, asset management

Application/Vendor	Purpose	Annual License Fees	

c. Facility Maintenance, including maintenance scheduling, work order generation, inventory, asset management

Application/Vendor	Purpose	Annual License Fees		





# d. Finance and Accounting (e.g., accounting, GL, fixed assets, payroll, NTD reporting, etc.)

Application/Vendor	Purpose	Annual License Fees	

#### e. Service Planning and Scheduling (do you use Hastus, Trapeze or a similar product?)

-		
Application/Vendor	Purpose	Annual License Fees

# f. Customer Service/Customer Information/Telephone Information

Application/Vendor	Purpose	Annual License Fees	

# g. Website Development/Maintenance/Trip Planning

	· · ·		
Application/Vendor	Purpose Annual License Fees		

5. Please indicate if your agency uses any of the following specialized IT systems and provide details as applicable:

System	Have System	Vendor	Estimated Annual	If Agency does not have now, do you
	(Yes/No)		Maintenance	plan to in next 5
			Expense	years?
Fare collection system				
Bus radio voice and/or data				
communications systems				
Bus GPS/AVL/CADD Dispatch				
Mobile Data Terminals (MDT)				
"Next Bus" or similar system				
for bus arrival times (on				
vehicles or at stops)				
Traffic Signal Priority Systems				
Integration with Google				
Transit for public information				





Automatic Passenger		
Counters		
Data Exchange/Coordination		
systems with other agencies		
or information centers		
Other Systems not listed		
above:		





#### F. Fixed Asset Review:

Fleet Maintenance:

1. Please provide the fleet size and composition, manufacturer, model year, bus size(s), fuel type(s), mode served, and peak pull-out requirement for each sub-fleet of the revenue fleet vehicle fleet.

Quantity	Manufacturer	Model	Vehicle	Fuel Type	Mode Served	Peak Pull-out
		Year	Length			Requirement for
						this sub-fleet

2. Please provide the fleet size and composition, make, fuel type(s), etc. of non-revenue fleet vehicles, such as administrative pool vehicles, driver relief vehicles, maintenance support trucks, etc.

Quantity	Make	Model Year	Fuel Type	Mode Supported

3. How are fleet maintenance services provided? Are they provided by direct agency personnel or by a contractor(s)? Are any components of your fleet maintenance program contracted out, such as heavy engine overhauls, body repair/painting, A/C repairs, etc.?

4. Where are your fleet maintenance services provided? How many maintenance yards/facilities does your agency operate? Are there currently any shared maintenance activities at your yard(s), such as maintenance of more than one transit mode, or maintenance of another agency's fleets? Do you have space in your facilities to accommodate additional vehicle maintenance for another agency?

Facility Name	Facility Location	Maintenance Services Provided	Space Available for Additional Maint.?

5. Please list major sub-contractors used for significant vehicle maintenance services, such as tires, engine and transmission overhauls, HVAC repairs, body work, etc.:

Sub-Contractor	Fleet Maintenance Services Provided

# PARSONS BRINCKERHOFF



6. Please list the fuel types and fuel suppliers used for your operation. Also, please indicate whether fuel is purchased on long-term contracts at fixed prices and/or with adjustment clauses, or if you purchase fuel on the "spot market", in the following table. Also, do you jointly purchase any of these fuels with other transit agencies?

Fuel Type	Supplier	Type of Fuel Purchase Contracts	Jointly Purchased with other Agencies?

7. Does your agency have a Fleet Maintenance Plan (FMP) and/or written Preventative Maintenance Program with specified inspection and maintenance intervals for each fleet type? Please briefly describe these programs and provide the Plans/Programs separately. Is the FMP based on vehicle life cycle with scheduled component change-outs and/or rebuilds?

8. Please briefly describe the process your agency uses to prioritize capital replacements of buses and fleet maintenance equipment for incorporation into your Capital Improvement Program.

9. Is there a process or set methodology for determining what percentage of total agency resources are available for the Capital Improvement Program each year, or is this determined annually based on prioritized needs?

10. Does your agency conduct joint procurements with other agencies for purchases of buses or other equipment? If so, which agencies and for what types of procurement?

Joint Procurements Conducted with these	Types of Items Jointly Procured (buses, hoists, etc.)
Agencies:	

11. Please describe your fleet inventory management practices and the value of fleet maintenance inventory typically kept on hand. Do you jointly procure any inventory with other agencies?

12. Does your agency use an inventory management system or software? Is the inventory software integrated with the maintenance work order system and are parts issued and tracked to individual bus numbers?





13. If maintenance is contracted, is the contractor's maintenance management system either integrated with or accessible to your agency? Is the contractor's inventory management system accessible to your agency?

14. How is maintenance training handled at your agency? Please provide a description of the types and levels of maintenance training provided for your personnel (or that of your contractor).

		-
Type of Training Provided	Employee Group Trained	Level of Training (training hours, classroom, hands-of, certification levels, etc.)

Facility Maintenance:

1. Please list the number and type of facilities that are maintained by your facility maintenance department.

Type of Facility	Number of This Type	Uses (Fleet Maintenance, Transit
		Center, Administration, etc.)

2. Does your agency have a Facility Maintenance Plan or Program? Please briefly describe these programs and provide the Plans/Programs separately.

3. Please list major sub-contractors used for significant facility maintenance services, such as landscaping, custodial services, bus shelter cleaning, etc.:

Sub-Contractor	Facility Maintenance Services Provided

4. How do you handle bus stop sign and passenger amenity (benches, shelters) installation and maintenance? Is this done with in-house personnel, contractors, or a mix of both?

Type of Bus Stop Amenity	How Installation and Maintenance is Handled
Bus Stop Signage	
Bus Stop Benches	





Bus Shelters	
Trash Receptacles	
Other	

5. Does your agency own any rights-of-way or other property that requires periodic maintenance services, such as weeding, mowing, cleanup, etc.? How is this work handled?

6. Are there any other facility maintenance needs that your agency handles?

# Appendix C Site Visit Meeting Summaries

# THIS PAGE INTENTIONALLY LEFT BLANK





# Site Visit Agenda SANBAG Countywide Transit Efficiency Study Tuesday, April 22, 2014 Barstow Area Transit

#### Attendees:

BAT: Jason Shaw, Transportation Manager, City of Barstow Tom Conlon, General Manager, MV Transportation PB: Tom Lichterman Debra Meier

#### A. Agency Overview

# General Information:

- 625 SQ Mile Service Area (not including the County Routes)
- City Council acts as BAT governing board
- Feb 2010 City Council cut BAT budget by 48% -- by mid-2010 merger discussions with VVTA were initiated.

#### Fare Box Recovery

- Does Fare box recovery meet 10% min? Per Jason: No, not at present time. Are corrective measures being implemented? Per Jason: No, all systems are status quo until the merger with VVTA has been completed, at SANBAG's direction.
- Budget is heavily dependent on City /SBCO LTF

# Status of VVTA Merger:

- Governmental agreement is being drafted and reviewed by VVTA / City attorneys.
- Since 2010/2011 BAT systems have remained status quo while merger proceeds . . . no new equipment, no route changes, etc.
- BAT / MV staff have not been included in any recent conversations pertaining to the merger

# B. Transit Services Provided

- Fixed and ADA ParaTransit
- County Route to Trona/Big River –all volunteer drivers via (Senior Centers). BAT provides assistance with vehicles and maintenance.
- Routes 4 (Hinkley) & 5 (Newberry/Daggett) are Dial-a-Ride service only; this constitutes ADA and general public service.
- Peak period 10am to 1pm

# ADA Routes

- ADA Routes are kept very close to the <sup>3</sup>/<sub>4</sub> miles radius to the fixed routes
- ADA access is most requested during the first 4-5 days of the month (after checks have been received)
- Approximately 110 ppl are often served on such days

- ADA certification is processed by MV Transportation; Certifications are good for a 3-yr period.
- ADA Certified clients will receive reduced fare if they will migrate to fixed route use ... very few take advantage of that benefit.
- C. Service Planning
  - Information in the 2009 COA is very outdated . . . routes, equipment listing, etc. has been changed.
  - Annual Un-met Needs Hearing most recent hearings were held at VVTA. No new issues have been raised at recent hearings.

# <u>Ridership</u>

- All ridership statistics are based on driver data drivers log all stops and number of passengers.
- Driver data is randomly crossed checked with info from on-board cameras.
- Wheel chair boarding is an issue especially on high ADA days early in the month.

# Service Planning

- Service Planning is done by Jason. Jason reviews monthly data from TransTrack system; changes made to system as needed.
- On=time performance is also tracked by driver data
- D. Operations and Admin Support Functions
  - MV employees are represented by Teamsters 166
- E. Management Information Systems/IT
  - BAT has no technology in use in the bus operating system. Excel spreadsheets are used to track data collected by drivers.
- F. Fixed Asset Review

# Maintenance Facility:

- \$50k/year lease cost
- There is room for expansion both on the property and within the facility (approx. 45% of capacity utilized currently).

# Maintenance Operations:

- All work done in-house, including transmission service and engine overhaul.
- Maintenance Ops utilize FleetFocus (Maximus) to track maintenance tasks, work orders, inventory, productivity etc.

# Fuel

- Buses obtain fuel from City CNG facility (LNG delivered via truck and converted to CNG)
- Gasoline from commercial vendors via corporate account
- Location of CNG fuel to maintenance facility is not convenient there is no back fueling opportunity within the City of Barstow.
- LNG/CNG purchase is a City function, not controlled by BAT.

Ideas where shared support could be beneficial:

- Route Planning
- Marketing
- IT
- Financial Management
- Reservationists
- Consultants/Procurement
- Staff for specific needs (Omnitrans for example).





Site Visit Summary SANBAG Countywide Transit Efficiency Study Tuesday, April 29, 2014 Morongo Basin Transit Agency

#### Attendees:

MBTA: Joe Meer, General Manager Cheri Holsclaw, Office Manager Mark Goodale, Operations Manager PB: Tom Lichterman Debra Meier

#### General Manager Remarks:

- Joe has been with MBTA since 2002
- As a result of the recent COA/SRTP MBTA was able to also get a Para-transit Plan and a Fare Recovery Study.
- MBTA routes are focused on the Deviated-fixed route concept
- MBTA has recently built transit centers in Twenty-nine Palms and Yucca Valley
- MBTA returns approximately 40% of LTF funds to local jurisdictions
- Transit Agency Grants (TAG) in the amount of approximately \$40K are made available to local non-profits to provide transit services. The non-profits use the funds to pay for TREP programs. Funds are provided from the CalAct Bus Procurement program's administrative fees that MBTA collects to manage that program.
- Joe does a lot of community outreach, presentations to local non-profits, etc.
- A. Agency Overview
  - 5316 Env Justice Grant funds a volunteer driver reimbursement program which is coordinated through VTrans
  - ADA eligibility is done in-house
  - Grants reporting at MBTA is only to Caltrans, not FTA, due to the type of federal money received.
  - A FTA Section 5311f grant paid for the bus shelters and transit center construction, using grants MBTA wrote for discretionary grants.
  - MBTA is non-union
- B. Transit Services Provided
  - Routes 1, 12, and 15 all qualify as intercity service so no complementary ADA service is required.
  - The local circulator routes operate as deviated fixed routes so the ADA service is provided in conjunction with the regular route service. Deviations are open to the general public based on guidance/interpretation of the regulation from FTA. Deviation requests can be called in as little as one hour in advance.
  - Supplemental general dial-a-ride service is provided to an expanded service area due to the nature of the area.
  - MBTA does not have connections with other San Bernardino County operators, only with Sunline in Palm Springs.

- Taxi service is limited, might be able to supplement late night hours service coverage only.
- C. Service Planning
  - An agreement with Sunline Transit has been approved to allow MBTA to make a loop within downtown Palm Springs no fare agreement was included.
  - Travel market: Copper Mtn College, discretionary riders, large number of transit-dependent riders, military.
  - The low cost of housing was identified as a major reason for the large senior and disabled community and ridership. Military was estimated at about 10-15% of ridership.
  - MBTA has no specific service planning staff
  - Route 21 does not make 10% farebox recovery but is supported by the better performance on other routes. It serves outlying communities on a 2-hour headway.
  - MBTA staff (Joe, Mark) reviews incoming development proposals for transit accessibility, makes recommendations to the cities for turnouts, shelters, etc.
- D. Operations and Admin Support Functions
  - Retirement CA PERS (2% @ 55), all employees pay their own contribution
  - MBTA provides administration of the local Taxi-Cab regulation annual inspections and business licenses. The Cab CO's are largely based in 29-Palms and are focused on military services.
  - Grant writing is done by Cheri she has been very successful with grant applications. SANBAG will provide technical support if requested, and SANBAG does help with updates for the STIP.
  - Low-Carbon emissions credit banking / Renewable Gas Credits (RNG) would benefit from some structural support in tracking credits for potential sale. MBTA is studying this as a possible funding source. As generators of CNG, MBTA generates credits which can be "sold" to high polluters. Credits are reported to ARB. Perhaps SANBAG or a consortium of the operators could create a brokerage or "bank" to sell reported credits.
  - MBTA is a DMV 3<sup>rd</sup>-Party Administrator for driver training which is done in-house.
- E. Management Information Systems/IT
  - TransTrack for operational data/performance reporting
  - MBTA paid TransTrack an additional one-time fee to get special programming that provides customer data bases and generates a manifest for the dial-a-ride services. This may be something the other small agencies could use.
  - Fleet Controller Maintenance management software which tracks work orders, parts inventory, etc.
  - Zonar Vehicle Inspection Reporting system for driver pre-trip inspections before pullout
  - Video Surveillance at each transit center and is monitored form the dispatch office.
- F. Fixed Asset Review
  - Major repairs are "let out", general maintenance is done on-site
  - CNG upkeep \$60K / yr for maintenance / repair
  - Two CNG stations One at main facility in Joshua Tree and a second in 29-Palms
  - Parts / lubricants / tires purchased through State DGS (Department of Governmental Services) procurement, believes they get good value in this manner

- Most non-OEM parts are either Ford or GM (cutaway chassis/cab)
- CNG is economical for MBTA they estimate costs at about \$1.00 per gallon-equivalent
- Cummins/Cal Pacific used for some heavy rebuild work on a case by case basis.

Ideas where shared support could be beneficial:

- CNG purchase: CNG purchased from Southern CA Gas via direct pipeline
- CNG Operations and Maintenance support MBTA is spending \$60,000 a year for this, would like to consider a joint effort with the other CNG-using agencies. Possibly a larger contract covering all the systems in the county.
- Service Planning: access to ON-call service planning staff (via SANBAG perhaps) to assess ongoing needs; Title VI reporting; Fare analysis; ADA Para-transit studies; On-board surveys. (Note – SANBAG spent \$2M in the last round of COA/SRTPs)
- Marketing / Customer Service: no cost savings, but regional transit connectivity could be a big benefit.
- Staff / Development: willing to participate in regional training that may be available and/or useful to staff
- IT
- Financial Management
- Reservationists
- Consultants/Procurement
- Staff for specific needs (Omnitrans for example).
- Joint bus parts procurement is open to this as an area for joint coordination but with caveat whether vehicle differences would make this worth pursuing. Also, VVTA is contracted, and Omnitrans' cutaways are contracted, reducing the likely pool for coordination among the agencies on this item.





Site Visit Agenda SANBAG Countywide Transit Efficiency Study Monday, April 28, 2014 Mountain Transit (formerly MARTA)

Attendees:

Mountain Transit: Kathy Hawksford, GM/CEO Michael Mawson, Consultant –Asst GM) PB: Tom Lichterman Debra Meier

#### CEO Comments:

- Two facilities Big Bear and Crestline
- Both facilities have limitations on yard space and garage space (ceiling height and depth garage limitations results in work on larger busses being done outdoors)
- High percentage of clientele is low income / fixed income / transit dependent
- 50% of all homes on the mountain can be vacant due to seasonal usage (peak seasons summer / winter)
- The winter and summer months are peaks in the service area in terms of visitors; spring and fall are lulls in visitors and demand.
- The terrain and weather are unique aspects of the MARTA service area that can create challenges for operations, especially in winter.
- Hiring qualified help in this mountain area is often very difficult.

# Ideas for shared support:

- Parts, etc. YES
- Tires Currently on Goodyear mileage/lease basis but would be open to other options
- Other services i.e engine overhaul this works is currently shipped out but local shops have provided good values to the agency.
- Procurement YES Mtn Transit has no procurement specialist
- Staff training / staff development Kathy looks for opportunities to send staff to OmniTrans for staff development or training opportunities.
- Driver Training yes, BUT, the training does not always fulfill the unique needs of driver training for mountain roadways, so perhaps only the classroom portion could be done at another agency
- Regional connectivity / marketing: YES, certainly marketing of Mtn Transit access opportunities from the Valley up to the Mtn communities. It would help to have some overnight parking opportunities that clients could utilize for recreation/travel opportunities.
- Service Planning: YES Kathy & Michael do the routine service planning; and use the SRTP goals/recommendations (completed every 5-yrs).
- Grants/Admin: Kathy currently prepares all grant app's and has been fairly successful.
- Contract Services: Contact administration would be a new venture for Kathy and she is not anxious to take on new tasks at this time.

- ADA Certification: currently completed in house, but open to other options.
- Insurance Pool: already participates in CAL JPIA
- Budget: Mtn Transit just established Day / Weekly Passes to be initiated July 2014.
- Coordination with OmniTrans for Field Supervisors in the event of an accident when Mtn Transit vehicles are in the valley. Even the provision of a bus if needed to move customers out of danger and get them back home. Mtn Transit would reimburse OmniTrans for services and staff provided.
- A. Agency Overview
  - Grant writing: Kathy does the grant writing herself and has been pretty successful
  - Operating Budget: JARC Grant (new to MARTA) used to fund extended service and Mobility Manager (currently a 1-yr consultant contract).
  - Fuel: Fuel purchased under agreement with SBCO. Rates vary as often as daily due to market conditions but MARTA believes they are getting a better rate overall than other gas stations in the area. CNG is now being used for local school bus fleet, but the CNG engines are not effective in this altitude (6,700'), and would not be appropriate for the Off-the Mtn routes due to power/engine torque requirements. MARTA uses gasoline and diesel fleets.
  - Crestline facility desperately needs upgrades and more room space is an issue and there is no room for expansion.
- B. Transit Services Provided
  - Running Springs Route 4 low ridership considering a deviated Fixed-Route
  - OmniTrans drivers are supposed to accept Mtn Transit transfers for discounts, but they are rarely honored.
  - Rate increase effective July 2014
  - Regarding D&A testing, MARTA has had substantial difficulty finding certified collection facilities that are open other than M-F 9A 5P.

# C. Service Planning

- MARTA has just added Sunday service as a result of the unmet needs process
- Due to the nature of the service area, the paratransit system operates beyond the 3/4ths mile range around fixed routes. A surcharge of \$2.50 is charged for those trips.
- Regarding ADA, MARTA realizes it has low productivity due to nature of service and area. A recommendation in the COA to require 24 hour advance reservations would help and is something being considered.
- Due to low performance on Route 4, conversion to a flex route is being considered.
- An issue not clear in MARTA's opinion is whether deviations on deviated fixed route service can just serve ADA passengers or must serve all passengers. (Joe Meer, in MBTA visit the next day, indicated FTA has informed him that all passengers must be served on deviations).
- Some fares are going up effective July 1 on the OTM service for equity reasons.
- D. Operations and Admin Support Functions
  - Benefits Lincoln Financial (no PERS) 2% contribution to 401A plan.
  - Drivers have their own Teamsters Pension program

- E. Management Information Systems/IT
  - Management Plus-Tracks PMs, equipment and maintenance history
  - Camera/audio installed on each bus
  - GPS accessibility for each bus and can be tracked from office computer.
  - GoogleTransit integration
  - New website being launched this summer a client will be able to do trip planning on-line via new website.
- F. Fixed Asset Review
  - See updated list of vehicles provided.




## Site Visit Agenda SANBAG Countywide Transit Efficiency Study Tuesday, July 8, 2014 Needles Transit Services Meeting conducted via Teleconference

Attendees:

Needles staff: Cheryl Sallis, Transportation Manager, City of Needles Raelynn Metz, Local Manager, McDonald Transit Associates PB: Tom Lichterman Debra Meier

#### A. Agency Overview

- Needles Area Transit (NAT) refers only to the deviated-fixed route service; while Needles Transit Services (NTS) refers to NAT, along with the DAR and DAR-Medical transportation services.
- Budget Clarification a separate budget is maintained for NAT, DAR and DAR-Medical FY2013/2014 FY2014/2015

DAR	\$23,050	\$24,409
DAR Medical	\$9,831	\$9,771
NAT	\$590,285	\$586,987 (\$275K Capital costs/\$311,987 Operations)

- DAR Farebox recovery has a mandatory 15% requirement the Farebox recovery is typically greater than 15%, however, in the event it is below 15%, the Senior Center makes up the difference.
- DAR Funding Sources: CDGB (covers portion of driver salaries), LTF (8C), Fare Revenue, Measure I, Local Funds.
- DAR-Medical Funding Sources: Fare Revenue and Measure I
- NAT Funding Sources: LTF (8C), FTA 5311, Fare Revenue, Measure I, Homeland Security Prop 1B (Capital), State Transit Asst-Capital.
- Senior Center Funding Sources: Transportation Funds (5310) were used a number of years ago, now have a transportation fund used to help meet the 15% requirement. They are not funded from general Ops Budget.
- FY2014/2015 Capital Cost \$275,000 this is contribution to the development of the new transit center and garage which is under reconstruction within the old El Garces Depot. McDonald staff will relocate to this facility and lease from City once it is opened.
- Cheryl reports budget data within TransTrack.
- Use of LTF Cheryl believes that all LTF is used for Transit Service, and are not returned to City for other purposes.
- No ADA certification is required, as anyone can request deviated route service by calling the dispatcher.
- Cheryl is looking into possible Fare increase to be instituted by end of 2014 she is reviewing with Regional McDonald Transit Manager to predict impacts to ridership. Increase being considered is from \$1.10 to \$1.25.

- B. Transit Services Provided
  - NAT operates a deviated-fixed route service with an east end loop and a west end loop, the bus passes the downtown transit center at G Street and Broadway every 30-minutes, with 60-min intervals at all other stops.
  - DAR-Medical was initiated in 2008, and operates 2 days/week with medical transportation provided to the Valley View Medical Center in Fort Mojave, AZ (\$5 round trip). Trips to other destinations are also provided at a cost of \$10/round trip.
  - The Senior Center operates the DAR services, and the 2 PT drivers are City employees.
  - The deviated-route service works very well for NAT. The deviations are typically with 2-3 blocks of the route, the biggest request for deviated service is after the first of the month.
- C. Service Planning
  - Route planning and other Service Planning functions are performed once per quarter with McDonald Transit Regional Manager. Cheryl also reviews TransTrack data once a quarter.
  - The Jack Smith Park route has been dropped indefinitely. The City Council had wanted to see if local youth would use the service for access to the park which is along the river. The service was run for 60-days and then terminated as there had been NO riders during the initial period.
  - On-Time Performance: Monitored by monthly report provided by McDonald Local Transit Manager. On-time performance is typically 95-100% if it varies from that standard they will receive call from the riders.
  - Goals and Standards: Currently no adopted goals and standards beyond the expectations that are identified in the McDonald Contract. They anticipate that goals and standards will be included in the SRTP that is currently being prepared by AMMA.
  - Annual Hearings for UnMet Needs: Cheryl participates in the Annual UnMet Needs hearing that is held by VVTA. She will post hearing notices locally and on buses. In addition, residents/riders can attend any City Council meeting and provide comments about routes and service during the public comment portion of the meeting.
- D. Operations and Admin Support Functions
  - Staffing: Cheryl is City's Transit manager; this takes up approximately 10% of her duties as
    assistant to the City Manager. She prepares the budgets for the three systems (NAT, DAR, DARMedical) with some support from SANBAG; City Finance Dept provides assistance with driver
    salaries.
  - McDonald Transit: 1 Local Manager, 2 Drivers, 1 Dispatcher/Back-up Driver.
  - DAR/DAR-Medical: Ops provided by Senior Center and 2 PT drivers are City employees
  - Vehicle Maintenance: DAR vehicles maintained by mechanic at City Yard; NAT vehicles are taken to local vendor for routine service, and for major work the vehicle is taken into Bullhead City AZ to a larger shop or dealership. McDonald does not have any maintenance staff; the drivers perform daily vehicle safety checks and clean vehicles at the end of each day. (see more info in Section F).
  - Customer Service: Cheryl and Raelynn handle the majority of the customer service calls directly. The DAR drivers are a great Customer Service asset to the system as well.
- E. Management Information Systems/IT
  - Farebox equipment: "MainFare" Drop Box on the bus, maintained daily by bus driver.

- TransTrack
- Two way phone/radio system utilized by bus drivers and dispatch operator.
- Dispatcher prepares manual forms for requested deviated service.

## F. Fixed Asset Review

## **Vehicles**

- NAT: 2 cut-away buses and 1 back-up
- DAR: 2 small cut-away vehicles with a back-up Van

## Maintenance Facility:

- Built into cost of contract not sure what the actual cost of the current rental facility is.
- The McDonald Staff will soon be moving into the transit center being developed at the El Garces Depot. They will have a detached garage for storage of the busses. McDonald will lease the facility from the City.

## Maintenance Operations:

- All work is out-sourced. McDonald does not employ any mechanics, nor do they keep parts of any kind on-hand. However, McDonald does have a Regional Mechanic that will come out to Needles for support on an as needed basis
- Routine Maintenance is taken to *Desert River Lube & Latte*, a local mechanic shop; heavier engine work is taken to Bull Head City, AZ.
- DAR vehicles are maintained by City employed mechanic at City-Yard (this individual also maintains all City vehicles and Sheriff vehicles).
- On a daily basis the drivers complete an inspection of the bus before the start of the route. They assess for engine fluids, good working order etc. Drivers also clean the busses at the end of each day.
- McDonald Manager manually tracks vehicle maintenance records and arranges for services as indicated by mileage and service interval. PMI's are entered into TransTrack.
- Local staff are not utilizing any formal Vehicle Maintenance Plan
- McDonald staff does not oversee training requirements or drug/alcohol testing of staff employed by vendors.

#### Fuel

- NAT vehicles obtain fuel from ARCO station in AZ (fuel prices are approximately \$1 per gallon cheaper in AZ).
- DAR vehicles obtain fuel at County Yard (located at the Airport)

## Ideas where shared support could be beneficial:

#### Training

• Cheryl does watch the OmniTrans Training "Blasts" but does not often attend. Travel and per diem expenses are just too great for the system to absorb.

## Needles Transit Meeting Summary July 8, 2014

McDonald Transit staff are all certified driver instructors – they extend training to the DAR drivers.

#### Procurement

- Because all maintenance is out-sourced joint parts procurement has no added value.
- Their most recent vehicle procurement was done through CalACT

#### Regional Transit Telephone info or County-wide Transit Website

• Supports but currently all customer calls handled by Cheryl or McDonald staff. Most riders are pretty familiar with route.

#### SUMMARY OF OTHER NEEDS AND SERVICES:

#### The Fort Mojave Indian Reservation (FMIR) proposed Transit System

This transit system, proposed by the FMIR, would provide connections between Needles and Fort Mojave and Bull Head City, AZ. Cheryl has attended public hearing at the Tribal Office pertaining to the service, but is not aware if it will be implemented. With proper schedule timing and coordination the FMIR service could be a complement to the NAT service, giving residents access to Medical care, groceries and other amenities.

#### Access to Medical Care

Basic medical Care is available in Needles at either Colorado River Medical Center or Tri State Community Healthcare Center, both located on Bailey Avenue in Needles. Cheryl indicated during conference call that income levels in Needles are very low and many residents are on Medi-Cal which is not accepted by some doctors in Arizona, so many end up in the local emergency room for medical needs.

More advanced healthcare needs are available in Fort Mojave, AZ at the Valley View Medical Center located approximately 10-miles from Needles. The Needles DAR-Medical service provides twice weekly service to the Valley View Medical Center and has a number of on-going medical treatment riders.

#### Access to Supermarket

The only grocery market in Needles closed earlier this year; the nearest full service markets are located in Fort Mojave, AZ, a distance of approximately 10-12 miles from Needles. There is currently no public transportation between Needles and Fort Mojave AZ, other than the twice-a-week DAR Medical Transport.

#### Access to County Court System for Needles Area Residents

There is currently no public transportation provided between needles and any of the San Bernardino County Court locations; location and distance from Needles noted below. (Note: per an on-line review of Greyhound Bus service, Needles did not appear to be an available origin or destination for this service).

Barstow District (144 miles) (Cheryl thought this branch may be closed now) 235 East Mountain View Street Barstow, CA 92311 Tuesday – Thursday 8:00 AM – 3:00 PM

Joshua Tree District (137 miles) 6527 White Feather Road Joshua Tree, CA 92252 Civil - 8:00 AM - 3:00 PM Mon – Fri Criminal/Traffic 7:30 AM - 3:00 PM Mon -Thurs 8:00 AM - 3:00 PM Friday

Victorville District (174 miles) 14455 Civic Drive Civil Department: Suite 100 Criminal/Traffic Department: Suite 200 Victorville, CA 92392 Monday - Friday 8:00 AM - 3:00 PM

San Bernardino District (213 miles) Superior Court of California 247 West Third Street San Bernardino, CA 92415-0240 Monday - Friday 8:00 AM - 3:00 PM

Other San Bernardino County Social Service Office Locations CHILDREN & FAMILY SERVICES Needles Office

1300 Bailey Avenue Needles, CA

TRANSITIONAL ASSISTANCE Needles Office 1090 East Broadway Street Needles, CA





## Site Visit Summary SANBAG Countywide Transit Efficiency Study Wednesday, April 23, 2014 OmniTrans

Attendees:

OmniTrans: Scott Graham, CEO Jennifer Simms, Director of Procurement Jack Dooley, Director of Maintenance Marjorie Ewing, Director of HR Wendy Williams, Director of Marketing Don Walker, Director of Finance Jeremiah Bryant, Service Planning Jacob Harms, IT Director Diane Caldera, Interim Director of Operations Anna Rahtz, Acting Director of Planning Samuel Gibbs, Director of Internal Audits PB: Tom Lichterman Debra Meier

#### A. Agency Overview

General Information:

- New organizational structural analysis going to the Board in early May. Changes combine the Planning and Marketing departments into one function to save staff costs.
- Safety and HR are also being combined.
- Omni is a direct grant recipient for FTA grant funds.
- Grants are prepared in-house by Planning staff (Anna)
- Omni keeps all local LTF funds (no funds returned to cities)
- CMAQ funds used annually to purchase busses, distributed by AQMD.
- Omni uses the American Bus Benchmarking Group (ABBG) to evaluate how they stack up against peers.
- Grant process: TIP is submitted to SANBAG who in turn submits to SCAG.

Cost Saving Opportunities:

- Study Team asked about possible further contracting opportunities. Omni evaluated the sbX service for contracting out the driver labor but it did not appear to save any money. Also looked at contracting part of their service, perhaps one division. Also did not save money in their analysis.
- Centralized telephone information is something Omni is open to discussing. Already have online trip planner in place.
- Omni is open to possible resource sharing in the service planning area, also bus cleaning and repair, body shop.





- LNG/CNG Community issues with smell of CNG led to their use of LNG at West Valley. LNG is costing about \$0.51 more per gallon equivalent to truck in. Is open to re-looking at this if technology has improved.
- Also, if they go to CNG, they could sell to public as additional revenue source.
- Clean Energy supplier. Goes to Board for re-contracting in May.
- B. Transit Services Provided
  - The sbX line added about \$4 million a year in operating costs.
  - ACCESS service is contracted to <u>First Transit</u>; OmniTrans provides the insurance in order to get a better contract rate. This is the last Option Year of the contract
  - OmniLink service will be eliminated as of Sept 2013 per Board action May 2013. Most passengers can use the OmniGo routes in the same areas.
  - ADA Service Passenger Eligibility review is done in house; process is manual, needs to be looked at per Omni staff. Are considering in-person functional assessments but are very expensive.
  - Taxis for some ADA service Are looking at this through coordination with VTrans to reduce ADA costs.
  - "Beyond-the-boundary" service is \$5 surcharge per trip, Omni says it is a very small percentage of total trips.
  - First Transit (Operating ACCESS) has their own yards (east valley and west valley) and does their own maintenance
- C. Service Planning
  - Better coordination needed between bus systems and Metrolink SANBAG may be key to achieving this.
  - Omni sees need for more transfer agreements and coordination of schedules and transfers among operators where they do interface.
- D. Operations and Admin Support Functions
  - OmniTrans participates in the MBTA/CalACT bus procurement
  - LNG/CNG maintenance contract is \$250K/year
  - All contracts are "Federalized"
- E. Management Information Systems/IT
  - TRAPEZE: Is there any economy in a county-wide contract? NO TRAPEZE would not be interested in that discussion.
  - Network Management ON-POINT provides helpdesk and network management
  - NEXT-TRIP integration other agencies? Maybe ... but different agencies are going after different programs. Such as VVTA MyAvail.
  - IT network management is outsourced currently.
- F. Fixed Asset Review
  - 1/12 of Fleet replaced each year (15 busses / year)
  - Engine and transmission rebuilds could benefit from pooled contracting





Ideas where shared support could be beneficial:

- OmniTrans has reached out to smaller transit agencies for training and procurements. The smaller agencies have generally been relatively non- responsive.
- Tires and equipment, towing services
- Use of joint resources: operator training and licensing, customer service training.
- Marketing advice and related services there is currently very little service interface between the various transit agencies
- Phone bank services LA on-line trip planner interface.
- Service Planning Omni would be willing to resource share with smaller agencies with service planning efforts
- Painting/repairs feasible, but geography could be a factor
- Body Repairs Omni could assist with agencies with major body work
- Fuel Omni currently uses LNG converted to CNG; but this is being looked at again for possible CNG site at West Valley yard.
- Joint service Contracting not likely to work because agency needs are so different
- Risk Management
- Legal Counsel sharing
- Legislative Analyst and Lobbying (SANBAG could actually lead coordination of this task)
- Training and staff development (Leadership etc)
- Regional Fare Media
- Advertising (adds on buses and shelters) in order to get greater market share
- Procurements and procurement training





Site Visit Agenda SANBAG Countywide Transit Efficiency Study Monday, April 21, 2014 Victor Valley Transit Authority

#### Attendees:

VVTA:

Kevin Kane, Executive Director Nancie Goff, Deputy Director David Flowers, IT Manager Steven Riggs, Finance/Accounting Aaron Moore, Mobility Manager Ron Zirges, Maintenance Director PB: Tom Lichterman Debra Meier

#### A. Agency Overview

#### General Information:

- All senior management came from McDonald Transit when VVTA added direct staff in 1998
- VVTA has 13.5 FTE employees
- VVTA has developed great team work with local cities/towns.
- Approximately 50% of VVTA riders are students of some type . . . college students, military training programs, job training, etc.
- VVTA peak hours are mid-day (not morning and evening peak hours)
- Core service area is approximately 425 SQ Miles
- Future financial picture for VVTA looks stable
- VVTA has excess LTF funds that are returned to the member agencies (approx. \$7M) as a result SANBAG must conduct an "Un-met Needs Hearing" each September. The results of the hearing must be assessed for potential establishment of any new service. As a result of an early hearing the Sunday Service was initiated in Oct 2013.
- VVTA identified its Mobility Management program, the NTC Commuter Service, and the B-V Link/San Bernardino Valley Lifeline service as key areas they have led in the past few years. Also the Vanpool program, which now has 147 vans.
- VVTA's contract with Veolia is a revenue hours-based reimbursement contract.
- Veolia's contract is in the 4<sup>th</sup> year of a 7 year contract, and there are three more option years.
- The new maintenance facility was built using Certificates of Participation that go out 35 years, about \$1.5 million per year in capital lease payments.

## Status of the Barstow Transit Merger (anticipated process):

- Inter-governmental agreement between VVTA and City of Barstow for one-year
- During this year VVTA will amend the JPA to include Barstow and give SBCO a second seat on the board. Creating a 7-seat board (currently a 5-seat board) costs would then be spread to all 7-seats.
- Merger scheduled to be effective July 1, 2014.
- Veolia will be servicing the Barstow service area, taking over from current operator MV.
- Over time VVTA will rebrand their market area
- VVTA is concerned that there will be other costs beyond just the consolidation of ops into the Veolia contract and rebranding.
- BAT is supposed to give MV 90 days notice once the attorneys have figured out the IGA.

## Do you see any benefits to having a county-wide operations contractor?

• Per Kevin: Not necessarily, primarily due to geographic differences; but also consider the benefit of having multiple providers in the event of contractual or union labor issues. There is also a benefit in having local leverage and local senior contractor management on-site (and/or nearby).

Do you see coordination opportunities in CNG fueling or maintenance?

• Per Kevin, Veolia already maintains the CNG fueling station as part of its contract so they see no opportunities for coordination there. Barstow uses trucked-in LNG as does Omnitrans, while VVTA uses CNG which is compressed from gas line coming into facility. Different technologies.

Does the facility have capacity for additional vehicles/maintenance?

- Per Kevin, the facility is sized for 125 vehicles and only has 93 currently, so yes, it can handle more. However, Veolia is not currently staffed to handle any more vehicles or services.
- B. Transit Services Provided
  - The federal Mass Transportation Benefit Program (MTBP) allowance of \$245 a month was used to help get the NTC Commuter service running and charge the maximum benefit for the fare. When the feds reduced the benefit, VVTA reduced the fare to \$175.

## ADA Services:

- ADA Service typically extends far beyond the min <sup>3</sup>/<sub>4</sub> mile radius from the primary route. Why? The area is very low density and spread out; and political pressures.
- VVTA has no "zone" limit boundary.

#### C. Service Planning

#### Routes / Ridership:

- The lowest ridership is on the "County" routes (Routes 21, 22, 23) which are provided for coverage reasons. Some go up to 50 miles in one direction.
- B-V Link (route 15 and 15A) has grown from 3-days / week to 5 days / week based on demand and often runs at capacity.
- The Fort Irwin NTC route is consistent and typically self-sustaining
- The commuter route to the valley is currently suspended no strong connection to valley commuters makes the route difficult to manage.
- "life-link" provides service to the valley for medical access ... Loma Linda University Medical Center and Veterans Medical Center for example.
- TransTrack is used to review ridership/performance.

#### Service Planning:

- COA / SRTP prepared every 5-years . . . this serves as the planning guide for the subsequent 5year cycle
- VVTA experiences "On-Time" performance issues due to distances, traffic impacts, etc.
- No Service Planning staff available . . . Veolia provides a part time service planner as needed. This element is lacking from the VVTA team structure.
- Most of the COA's 2014 recommended service changes have been implemented as of October 2013. The Board adopted/approved the COA, which also recommended the staffing increase from 9 to 13.5 positions.
- VVTA conducts an annual "Unmet Needs" process hearing because they do not use all the LTF coming into the service area. This hearing process led to the implementation of Sunday service.

#### High Desert CTSA:

• VVTA Board is interested in establishing a High Desert CTSA

#### Fare Structure/Transfer arrangements:

- "Life-Link" riders get one connection on Omnitrans
- Fare structure between agencies is really only an issue if a successful commuter link is developed; until then VVTA riders have little ability to connect to other transit systems

#### D. Operations and Admin Support Functions

#### Contract Operator - Veolia Transportation:

- Currently VVTA is on the 4<sup>th</sup> year of a 7 year contract, with 3 one year options available.
- Veolia has a small teamsters union whose culture is currently very positive.
- Veolia uses a corporate accounting system a single accounting staff person is provided on site.
- Contract is based on "Revenue Hour"
- Fuel is a pass-thru cost

#### Mobility Management:

- Participation in the Driver-reimbursement program (funded by NEW FREEDOM grant)
- VVTA donates older cut-away vans to non-profit groups who provide transit to disabled, low income or elderly clientele; and VVTA makes arrangements to assist with maintenance.
- Travel Training participation
- Would like to expand Mobility Management to include CTSA duties, work with employers.
- Kevin said CTSA's can claim LTF, board wants to protect LTF.
- E. Management Information Systems/IT

#### Technology:

- MyAvail AVL technology, Bus/Route locator, QR Mobile display. Is integrated with their voice/data radio system
- INFO POINT has been up and running for 1 week customers as well as dispatch can access info related to bus/route location and timing
- VVTA in their 4<sup>th</sup> phase of implementation which began in 2004.
- A percentage of the buses have APC's so ridership is obtained that way. The buses have GFI Odyssey fareboxes.

#### F. Fixed Asset Review

#### Vehicle Procurement:

- VVTA participates with MBTA / CalAct in a joint procurement "consortium" that offers great economies of scale.
- VVTA is very happy with this arrangement.

## Vehicle Maintenance:

- General maintenance is part of contract price.
- VVTA pays costs for transmissions and engine overhaul.
- Major body work is done off-site; however they are trying to bring more such activities on-site.
- Brakes and other general maintenance are done on-site
- They have established a "paperless" shop, and they are using the "Ron Turley Associates (RTA)" program to track maintenance task efficiencies
- "Paperless" Inspections are in the works
- Capacity of maintenance facility is 125 (design capacity). Current fleet size is 93.
- VVTA is providing some support to non-profit groups that provide para-transit transportation.

## The VVTA facility:

- Funded by Certificates of Participation (35 year term).
- Lease/Lease-back arrangement annual cost of approximately \$1.5M

## CNG Usage:

- Contractually maintained by Veolia
- CNG delivered by direct pipeline to site by Southwest Gas Co.
- VVTA has 3 on-site fueling stations (for redundancy). One fueling station is available for public and other fleet use (local trash hauler is a frequent customer).
- Is there any efficiencies of scale when buying CNG . . . as with Omnitrans for example? Per Kevin: No, VVTA gets direct access CNG and Omnitrans gets LNG (provide via truck) that is converted to CNG. Reason – due to the Omnitrans location the direct supply of CNG is not possible due odor issues in neighborhood around Omnitrans facility.

## Bus Shelter Maintenance:

• Currently all bus stops/shelters are maintained by the local jurisdiction. However, Kevin sees that trend shifting to VVTA maintenance as the local jurisdictions push back on the maintenance aspect.

## VVTA Future capital projects:

- Small maintenance yard in Barstow
- CNG Station in Barstow
- Victor Valley Station (?? What would you be transferring too??)

#### Ideas for shared support:

- 1) ADA Compliant para-transit eligibility certifications VVTA wanted an "arms length" relationship in making the determinations, uses ADA Ride for this purpose. ADA Certification could possibly be a coordinated activity among all the agencies, handled under one region-wide contract.
- 2) Major procurements (not rolling stock)
- 3) Civil rights compliance (Ttitle VI, DBE, etc.)
- 4) Preparing RFPs for consultant services (COA, SRTP, other consulting services)
- 5) Fare Media
- 6) Staff Training/Development
- 7) Service Planning is lacking from VVTA capabilities; adding planning staff could serve to improve service performance. VVTA has no planners, would prefer to have a Planner on-staff, but coordination/resource sharing with another agency is a possibility.
- SANBAG supports all county transit agencies with SCAG interaction, completing FTIP input, and will often assist in reviewing grant applications for consistency and conformity. SANBAG (Nancy S.) has helped with 5311 grant apportionment for all the agencies. Grant applications/administration could be good coordination opportunity for SANBAG to handle.
- 9) The Veolia contract is pretty turn-key except for engine and transmission overhaul which VVTA pays separately for, has Veolia handle, limiting coordination opportunities for service operations/maintenance items.
- 10) Most buses are purchased through the MBTA/CalAct program.
- 11) Bus stop upkeep is a city responsibility.
- 12) Kevin said a combined regional telephone information center might be another area for coordination, also fare media, especially if County goes to Smart Cards.
- 13) Construction Possibly have SANBAG handle construction of new transfer locations and a new maintenance and CNG station for Barstow.
- 14) Regional fare structure Willing to consider.





## Site Visit Summary SANBAG Countywide Transit Efficiency Study Wednesday, April 30, 2014 SANBAG

Attendees:

<u>SANBAG</u>: Mitch Alderman, Director Transit & Rail Programs Monica Morales, Transit Specialist Nancy Strickert, Transit Analyst <u>PB</u>: Tom Lichterman Debra Meier

#### Meeting Overview:

On this date, the Parsons Brinckerhoff Assessment team met with SANBAG, both to conduct an agency site-visit comparable to that performed for the other agencies, and also to brief SANBAG staff on how the meetings with the other agencies have gone.

<u>Transit Agency Efficient Study – Schedule Goal</u>: Mitch indicated we should plan for a November – Committee presentation, and December – Board presentation on the study's progress to that point.

#### A. Agency Overview

#### General Overview of Transit Agency Meetings:

- Tom indicated that there was excellent cooperation and input from all the agencies the assessment team has met with over the past two weeks.
- MARTA, BAT and Needles DO NOT return any local LTF
- VVTA and MBTA DO return LTF to local cities, and it is expected that there will be returns each year. Therefore unmet needs hearings must be conducted for those jurisdictions.
- A key need identified at the smaller agencies was the need for service planning support, so that service problems and issues can be addressed in a more timely fashion than waiting for a consultant to come in and do a Comprehensive Operational Analysis every five years.
- SANBAG confirmed that only VVTA and Barstow are being considered for possible merger; Needles Area Transit is not being considered for inclusion despite references in one of the reports provided for review.

Potential Areas where OmniTrans could assist smaller agencies:

- Procurement (and particularly FTA compliance oversight)
- Major engine overhaul/repair
- Omni conversion to CNG from trucked-in LNG could be a substantial cost savings (Southern Cal Gas would provide CNG to both Omni and MBTA).
- In the future: Regional marketing and coordination

Areas where SANBAG can (or does) assist all agencies:

• Construction Management and Project Development





- SANBAG currently funds all COAs, SRTPs, Triennial (TDA/FTA) Audits, annual financial audits (some exceptions for OmniTrans).
- Possibly service planning SANBAG planners could help with SRTP's, service planning, rail service connectivity for METROLINK service and future Redlands Passenger Rail Project service.
- SANBAG does not have dedicated Marketing staff but recognized that an expanded regional vanpool program will require marketing efforts in the future. SANBAG currently uses consultant assistance for marketing.
- B. Transit Services Provided
  - SANBAG does not currently directly operate any services.
  - SANBAG clarified that the agency has suspended providing any more funding to Omnitrans for new BRT expansions but is supporting the new sbX implementation.

ADA Eligibility:

- Most agencies use in-house review; VVTA uses "ADA-Ride", an on-line service for 3<sup>rd</sup> party review/approval.
- Is there a desire to develop a system of <u>in-person assessments</u> for ADA eligibility?
- Inconsistent implementation of ADA service was noted at the agencies. Some agencies are providing ADA paratransit service beyond ADA requirements, at potentially significant cost.
- Inconsistent eligibility criteria and screening processes are being used.
- Would a use of Trip Reimbursement Program be useful for ADA transportation in place of a dedicated paratransit service, for some trips? Essentially an expansion of the type of service VTrans sets up.
- C. Service Planning
  - Use of SANBAG-provided local service planning staff could improve connectivity between METROLINK and transit agencies as well as help them address service quality issues.
  - Grant oversight: Not just the applications, but oversight and administration are key issues for assisting in the grant area.
  - SANBAG asked about the following issues regarding Barstow and Needles connections:
    - Barstow-Needles Service for court service connection (where are the closest court facilities?)
    - Needles area service to nearest grocery store? The only grocery in Needles is closing.
- D. Operations and Admin Support Functions
  - SANBAG does not currently directly operate any services.
- E. Management Information Systems/IT
  - SANBAG IT oversight and integration for regional connectivity
  - Website integration between all agencies for transit information is a possibility.
  - Our assessment concluded there is currently no IT systems consistency between any of the agencies. Omnitrans has the most sophisticated systems, including an enterprise-wide system known as SAP. The smallest agencies have virtually nothing but Excel spreadsheets.
- F. Fixed Asset Review
  - SANBAG does not have any transit fixed-assets.





Site Visit Agenda SANBAG Countywide Transit Efficiency Study Thursday, June 19, 2014 Valley Transportation Services (VTrans)

#### Attendees:

VTrans: Beth Kranda, CEO Jessica Jacquez, Administrative Manager Kimberly Perez, Travel Training Manager Kiosha Nelson, Program Administrator Ryan Hartman, Maintenance Manager PB: Tom Lichterman Debra Meier

#### A. Agency Overview

#### General Information:

- VTrans was created under the CTSA requirements of the Measure I re-authorization in 2010.
- VTrans is the designated CTSA to provide for the coordination of transit services for seniors, persons with disabilities, and persons with low income.
- VTrans receives 2% of the Measure I funds for the San Bernardino Valley area only (approximately \$2.2M/year).
- Primary goals of the organization are to COORDINATE SERVICES with public, private, and nonprofit entities in order to leverage transportation resources and funding, shift ADA para-transit (DAR or ACCESS) riders to social service organizations at a lower cost, and provide quality services.
- VTrans is staffed and positioned to provide services efficiently, move quickly on new ideas, and assist in the implementation of new services.
- VTrans is not a direct LTF recipient at this time; however, they may be eligible for up to 5% of local (valley region) LTF.
- There is some risk that the JARC/New Freedom funds that they rely on to support many of their programs may end in the next 2 years. (New Freedom funds will go to 5310 and JARC funds would go to 5307 which would be controlled by the Regional Planning Agency SANBAG.)
- All partner vehicle acquisitions have been through CalACT program

#### ADA Para-transit Services:

• There is currently no incentive for paratransit contractors to save money on the ACCESS paratransit service, due to contracts, driver salaries, and driver shifts. Even though ACCESS typically has two peaks in the day – drivers may be on-call for an entire shift, reducing cost-effectiveness.

## B. Transit Partners and Services Provided

## CURRENT PROGRAMS DIRECTLY RUN BY VTRANS:

<u>Travel Training</u> – VTrans Travel Trainers work with individuals and/or groups by teaching them to use public transportation.

- Travel Training goal is to move folks off of ACCESS / ADA DAR to fixed route busses or other social service organizations.
- 188 people have been included in the Travel Training Program between Aug 2012 and June 2014.
- Training is very individualized and can take from 2-days to 2-weeks to complete training.
- Travel Trainers often identify to OmniTrans when bus stops are not appropriately serving the stops needed for their clientele, or when maintenance or other needs have been neglected.

<u>Transportation Reimbursement Escort Program (TREP) for Rural San Bernardino County</u> – program developed in cooperation with County Department of Aging and Adult Services (DAAS); provides volunteer driver mileage reimbursement for rural territories of the county for elderly and disabled individuals.

- VTrans funds this program through a rural New Freedom grant (\$200K) completely grant funded.
- Participants are screened for eligibility (seniors / disabled)
- 500 miles is the max allocation, but the max allocation varies by client need.

## NEW PROGRAMS FOR FY 14-15 DIRECTLY RUN BY VTRANS:

<u>Expansion of the TREP for the East Valley</u> – VTrans was awarded \$312K in JARC and New Freedom funds to expand the TREP program within the valley area of the county.

<u>Taxi Voucher Program</u> – With a \$100K JARC grant and \$300K of Measure I funds VTrans is developing a Taxi Voucher program for seniors and persons with disabilities. The Taxi Voucher would cover 50% of the taxi cost, the remainder covered by the client. VTrans staff indicated the program rules are still in development but ADA-certified passengers would be eligible, also anyone unable to use the bus system to get to their job. There would be some type of maximum income determination for eligibility.

<u>Maintenance Facility</u> – VTrans has begun TI work on a Maintenance Facility to service their ADA/Paratransit partners. The facility will be operational later this year. They currently have two major social service agency programs (Pomona Valley Workshop and OPARC) signed up to use the facility and are in discussions with First Transit to possibly support overflow work from the Access system.

<u>IE United Way (IE211)</u> – "One Click – One Call" program. A U.S. Veteran transit needs program. United Way is developing the local program, VTrans is providing some funding and support.

## PROGRAMS FUNDED WITH VTRANS ASSISTANCE OPERATED BY SOCIAL SERVICE AGENCY:

<u>Community Connections</u> – volunteer driver program operated by Community Senior Services which covers the west end of the San Bernardino valley. Providing rides for seniors and persons with disabilities.

- VTrans contributes to funding of operational costs through New Freedom grant. Volunteer drivers are paid \$0.40 per mile.
- TREP-type program.
- VTrans reports the fully-allocated cost per trip in January February March 2014 averaging about \$5.25.

<u>Pomona Valley Workshop (PVW)</u> – this program provides transportation to ADA certified individuals attending the PVW program.

- All participants were one time ACCESS riders, approximately 85 people in the transportation program. Ridership (total one-way boardings) is about 3,000 per month.
- PVW owns their own vehicles
- Drivers are PVW employees and are only paid for their drive time to-from the facility.
- VTrans pass through funding for the transportation program (JARC and New Freedom Grant funding).
- VTrans reports the fully-allocated cost per trip in January February March 2014 averaging about \$7.75.

<u>OPARC (Ontario-Pomona Association of Retarded Citizens)</u> – OPARC provides vocational training programs for person with disabilities.

- New contract is under development (the contract will mirror PVW)
- VTrans will provide grant matching funds for OPARC to buy vehicles and begin their own transportation programs.
- OPARC clientele will be directly diverted from ACCESS to the OPARC transportation program (an estimated 6% diversion from ACCESS ridership).

<u>Central City Lutheran Mission</u> - Clientele are homeless or low-income HIV positive individuals who need access to medical care and treatment.

- VTrans helped CCLM purchase a bus (the program currently has 2 busses).
- CCLM has a dedicated driver for this program
- Approximate 30-40 persons / month in the transportation program
- VTrans contributes funds for on-going transportation program
- VTrans reports the fully-allocated cost per trip in January February March 2014 averaging about \$9.00.

Loma Linda Adult Day Care – program is for elderly, some with dementia and related issues.

- LLADC owns their own vehicle(s) and drivers are LLADC employees or LLADC volunteers.
- Approximately 25 people / month are served by the transportation program.
- None of the participants in this program are suited for fixed route travel due age and physical condition.
- VTrans contributes funds for on-going transportation program operations (5310 Senior disabled operating programs funds, New Freedom, and Measure I)

## C. Service Planning

<u>ACCESS</u> – VTrans has proposed to OmniTrans that they take over the operation of the ACCESS ADA service in order to actively coordinate and monitor the ridership. VTrans views it as part of a demand-management approach to try to place clients in alternative, less costly transportation options.

<u>ADA Eligibility Determination</u> – VTrans has also proposed to OmniTrans that they take over the ADA Eligibility process, and move to an in-person assessment system to ensure only qualified individuals are certified. VTrans is making a presentation to OmniTrans next week to support this idea. VTrans eligibility concept would include individual assessments which would allow VTrans to move riders to the most appropriate transportation program, or travel training as a way to help reduce Access costs. Omni gets approximately 2,000 applicants / year for Access which is contributing to the huge growth in the cost of the program.

VTrans has estimated it would cost as much as \$600K/year for this type of program (or about \$300 per assessment), but this would be quickly recouped as passengers are diverted to lower cost modes or found able to use fixed-route services. VTrans proposes to contract the assessment services to a qualified vendor and oversee the operation and management.

## High Desert CTSA:

• VVTA Board is interested in establishing a High Desert CTSA

## D. Operations and Admin Support Functions

VTrans reviewed and provided one correction to the staffing list we provided them. They currently have a total of 11 positions, five of which are associated with Travel Training.

## E. Management Information Systems/IT

<u>NTD Reporting</u> – VTrans has been advocating for additional NTD reporting of its efforts and those of its partner agencies. This would result in additional FTA Section 5307 being allocated to the region, probably to Omnitrans as the designated FTA recipient in the Valley sub-area. In order to effectively collect the data needed for reporting, VTrans would like to initiate providing technologies to partner agencies to make this reporting possible. This may include providing iPads in order to actively input data.

<u>ManagerPlus for Maintenance Program</u> - tracks fleet, parts, warranty work, work orders etc. for the soon-to-open maintenance facility.

## F. Fixed Asset Review

<u>Maintenance Facility</u> – operating costs estimated at \$300K / year until up and running. Facility located at 1044 Brooks Street in Ontario, Tenant Improvement work is underway.

# Appendix D Agreement/MOU Templates

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

## THIS PAGE INTENTIONALLY LEFT BLANK

SANBAG COUNTY-WIDE TRANSIT EFFICIENCY STUDY

## PROJECT DEVELOPMENT/CONSTRUCTION MANAGEMENT COOPERATIVE AGREEMENT

Appendix D – Agreement/MOU Templates

## COOPERATIVE AGREEMENT NO XXX BY AND BETWEEN SAN BERNARDINO ASSOCIATED GOVERNMENTS AND

## TRANSIT AGENCY

#### FOR

#### TEMPORARY FURNISHING OF STAFF ASSISTANCE FOR XXX PROJECT

**THIS COOPERATIVE AGREEMENT** ("Agreement") is effective on the Effective Date as defined herein, by and between the San Bernardino Associated Governments/San Bernardino Transportation Authority ("AUTHORITY"), whose address is 1170 W. 3<sup>rd</sup> Street, 2<sup>nd</sup> Floor, San Bernardino, California 92410-1715, and the **TRANSIT AGENCY** (AGENCY), whose address is address, City, California zip code. The AUTHORITY and AGENCY are each a "Party" and collectively are the "Parties" as identified herein.

## **RECITALS:**

WHEREAS, SANBAG, as the County Transportation Commission and the San Bernardino County Transportation Authority for San Bernardino County, has the responsibility to oversee and coordinate the provision of public transportation services and allocation of local, state and Federal funds for the County; and

WHEREAS, AGENCY is developing/constructing XXX project (Project) and is in need of project development/construction management/engineering support services; and

WHEREAS, AUTHORITY has certain project development/construction management/engineering Staff and/or On-Call Consultants under Contract (collectively referred to as AUTHORITY STAFF) that are or will become available to assist the AGENCY; and

**NOW, THEREFORE**, AUTHORITY and AGENCY in consideration of the mutual covenants hereinafter set forth and intending to be legally bound hereby agree as follows:

#### 1. Project Management Responsibilities

- a. Overall Project Management Responsibility for Project shall remain with AGENCY.
- b. AGENCY's Project Manager or his/her designee shall provide direction to AUTHORITY STAFF assisting AGENCY on the Project.

#### 2. AUTHORITY Responsibilities

- a. AUTHORITY shall provide project development / construction management / engineering support services through a combination of AUTHORITY STAFF, to AGENCY, for support of Project as identified in Exhibit "A" Scope of Work.
- c. AUTHORITY STAFF selected for this assignment shall be selected by AUTHORITY with the review and concurrence of the AGENCY, and are subject to change. AUTHORITY shall endeavor to make the STAFF selected for services provided on Project available for a minimum of XX months.
- d. AUTHORITY STAFF will recognize and follow all applicable rules, regulations or policies established by AGENCY affecting or pertaining to operation of the project site, when AUTHORITY STAFF are performing services.
- e. AUTHORITY STAFF shall work as needed per Exhibit "A" Scope of Work, but not to exceed a forty (40) hour workweek and shall be on the same schedule as AUTHORITY'S regular employees unless other work schedule arrangements are agreed in writing.
- f. AUTHORITY STAFF working on Project shall acknowledge that certain confidential or proprietary information belonging to AGENCY may become available to them, and as such, shall maintain such confidentiality.
- g. AUTHORITY STAFF are assigned to AGENCY only for the purposes and to the extent set forth in this Agreement. AUTHORITY STAFF'S relationship to AGENCY and its subsidiaries and clients shall during the period of this assignment and services hereunder be that of an AUTHORITY employee or independent consultant, as applicable, working in a professional manner. AUTHORITY STAFF shall not be considered as having an employee status with AGENCY or being entitled to participate in any plans or benefits of AGENCY for its regular employees. The AUTHORITY assumes full responsibility for all employment contributions, taxes, withholding, etc, under any state and local laws, as applicable.
- h. The AUTHORITY shall invoice AGENCY no more frequently than monthly, and no less than quarterly for the services provided for that period, based on actual hours worked and using the fully-burdened hourly rates for direct employees, and the approved billing rates for assigned consultant staff. Such fully-burdened hourly rates shall be specific to each position type, will be disclosed to AGENCY in advance, and will be consistent with the labor rate in Exhibit "B". AUTHORITY'S fully-burdened employee hourly rates shall include employee labor rates, fringe, benefits and overhead items such as workers' compensation, insurance, computers, office space and phone. For AUTHORITY On-Call Consultants assigned to the Project, the AUTHORITY shall invoice the AGENCY the amount so billed from the On-Call Consultants during the invoice period. With each invoice, AUTHORITY shall also identify any Project-related travel and other direct costs incurred by AUTHORITY STAFF. Mileage shall be billed based on the current, approved Internal Revenue Service rate.

#### 3. AGENCY Responsibilities

- a. AGENCY shall direct and control the work activities of the AUTHORITY STAFF and shall be responsible for providing a safe place to work in compliance with all safety laws and regulations while working at AGENCY-designated work site(s). AGENCY is not responsible for the health or safety of any AUTHORITY STAFF due to injuries or property damage caused by others not within the control of AGENCY at any Project site.
- b. AGENCY shall furnish AUTHORITY STAFF a copy of applicable rules, regulations and policies that AGENCY deems necessary to implement the provisions in Section 2.d above.
- c. AGENCY strictly agrees that it shall not induce, passively, actively solicit, approach or hire any of the AUTHORITY STAFF so long as this agreement is in effect and for a period of one (1) year thereafter except if mutually agreed in writing by AUTHORITY, AGENCY, and, if applicable, on-call consultants under contract, on a case by case basis.
- d. Upon receipt of the AUTHORITY invoice, AGENCY shall approve and make prompt payment on all invoices or explain in writing to the AUTHORITY Contact identified in Section 4.f below, the reason for disapproval of any item within 10 business days of receipt. AGENCY payment for undisputed invoice amounts shall be made within 30 days of receipt of invoice.

#### 4. AUTHORITY and AGENCY Responsibilities

- a. If AUTHORITY STAFF is deemed by AGENCY or the AUTHORITY to be unqualified to perform the assignment contracted for, AGENCY may request the removal of the AUTHORITY STAFF.
- b. Neither AUTHORITY nor any officer or employee or agent thereof is responsible for any injury, damage or liability occurring by reason of anything done or omitted to be done by AGENCY and/or its agents under or in connection with any work, authority, or jurisdiction conferred upon AGENCY under this Agreement. It is understood and agreed that AGENCY will fully defend, indemnify, and save harmless AUTHORITY and all of its officers, employees and agents from all claims, suits, or actions of every name, kind, and description brought forth under, but not limited to, tortious, contractual, inverse condemnation, or other theories or assertions of liability occurring by reason of anything done or omitted to be done by AGENCY and/or its agents under this Agreement.
- c. Neither AGENCY nor any officer or employee thereof is responsible for any injury, damage, or liability occurring by reason of anything done or omitted to be done by AUTHORITY and/or its agents under or in connection with any work, authority, or jurisdiction conferred upon AUTHORITY under this Agreement. It is understood and agreed that AUTHORITY will fully defend, indemnify, and save harmless AGENCY and all of its officers and employees from all claims, suits, or actions of every name, kind, and description brought forth under, but not limited to, tortious, contractual, inverse condemnation, or other theories or assertions of liability occurring by reason of anything done or omitted to be done by AUTHORITY and/or its agents under this Agreement.
- d. Overtime hours shall be defined by the AUTHORITY and approved by the AGENCY, and AUTHORITY STAFF shall not be directed by the AGENCY to work Overtime hours, unless agreed to in writing by both Parties.

- e. This Agreement shall be construed and interpreted solely in accordance with the laws of the State of California.
- f. Whenever any notice is required to be in writing or authorized in writing, such notice may be sent by regular mail, email or FAX. Any such notice shall be addressed to:

Notices to AUTHORITY: Name: Title: Address: City, State Zip: Email: FAX:

Notices to the AGENCY: Name: Title: Address: City, State Zip: Email: FAX:

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement as of the day and year first above written.

San Bernardino Associated Governments/ San Bernardino Transportation Authority	Transit Agency
Ву:	Ву:
Name:	Name:
Title:	Title:
Date:	Date:

Appendix D – Agreement/MOU Templates

APPROVED AS TO FORM:	APPROVED AS TO FORM:		
Name:	Name:		
Title:	Title:		

## **SCOPE OF WORK**

Insert a brief description of AUTHORITY services to be provided and overall Project.

#### Task 1:

Deliverables

Schedule

## Task 1:

Deliverables

Schedule

#### EXHIBIT "B" AUTHORITY BILLING RATE SCHEDULE AND OTHER DIRECT COSTS FOR PROJECT DEVELOPMENT / CONSTRUCTION MANAGEMENT / ENGINEERING SERVICES FOR XXX PROJECT

AUTHORITY Staff and/or On-Call Consultants likely to be assigned to Project, may include:

Position	Fully Burdened Hourly Rate*	Not-to- Exceed Hours	Total Costs
Subtotal			

\*These rates are based on current SANBAG budgeted rates for fully burdened employees and On Call Consultants. Hourly rates are subject to change over time based on employee salary and benefit increases as well as Consultant contract costs.

Other Direct Costs anticipated during the course of Project, may include but not be limited to:

Expense Category	Units	Cost	Line Item Costs
Miles			
Travel			
Printing/shipping/postage			
Subtotal			

Subtotal Project Costs	

## PROFESSIONAL SERVICES COOPERATIVE AGREEMENT

Appendix D – Agreement/MOU Templates

#### COOPERATIVE AGREEMENT NO XXX BY AND BETWEEN AGENCY PROVIDING SERVICES AND TRANSIT AGENCY FOR TEMPORARY FURNISHING OF PROFESSIONAL SERVICES

THIS COOPERATIVE AGREEMENT ("Agreement") is effective on the Effective Date as defined herein, by and between the Agency Providing the Services ("PROVIDER"), whose address is address, City, California zip code, and the Transit Agency Purchasing the Services (BUYER), whose address is address, City, California zip code. The PROVIDER and BUYER are each a "Party" and collectively are the "Parties" as identified herein.

## **RECITALS:**

WHEREAS, {COMMENT: describe the authority/responsibility of the providing agency, for example, if the provider is SANBAG this blurb could say: SANBAG, as the County Transportation Commission and the San Bernardino County Transportation Authority for San Bernardino County, has the responsibility to oversee and coordinate the provision of public transportation services and allocation of local, state and Federal funds for the County}; and

WHEREAS, BUYER is a transit agency in the XXXX area of San Bernardino County, responsible for the planning and implementation of transit services in XXX area of San Bernardino County and is need of professional services to assist in XXXX Project ("PROJECT"); and

WHEREAS, PROVIDER has certain professional expertise through onsite Staff and/or On-Call Consultants under Contract (collectively referred to as PROVIDER STAFF) that are or will become available to assist the BUYER; and

**NOW, THEREFORE**, PROVIDER and BUYER in consideration of the mutual covenants hereinafter set forth and intending to be legally bound hereby agree as follows:

#### 1. Project Management Responsibilities

- a. Overall Project Management Responsibility for Project shall remain with BUYER.
- b. BUYER's Project Manager or his/her designee shall provide direction to PROVIDER STAFF assisting BUYER on the Project.

#### 2. PROVIDER Responsibilities

PROVIDER shall provide {comment: describe the type of professional services required, engineering, technology, grants, civil rights, marketing, etc....} professional support services through a combination of PROVIDER

STAFF, to BUYER, for support of Project as identified in Exhibit "A" Scope of Work.

- c. PROVIDER STAFF selected for this assignment shall be selected by PROVIDER with the review and concurrence of the BUYER, and are subject to change. PROVIDER shall endeavor to make the STAFF selected for services provided on Project available for a minimum of XX months.
- d. PROVIDER STAFF will recognize and follow all applicable rules, regulations or policies established by BUYER affecting or pertaining to operation of the project site, when PROVIDER STAFF are performing services.
- e. PROVIDER STAFF shall work as needed per Exhibit "A" Scope of Work, but not to exceed a forty (40) hour workweek and shall be on the same schedule as PROVIDER'S regular employees unless other work schedule arrangements are agreed in writing.
- f. PROVIDER STAFF working on Project shall acknowledge that certain confidential or proprietary information belonging to BUYER may become available to them, and as such, shall maintain such confidentiality.
- g. PROVIDER STAFF are assigned to BUYER only for the purposes and to the extent set forth in this Agreement. PROVIDER STAFF'S relationship to BUYER and its subsidiaries and clients shall during the period of this assignment and services hereunder be that of an PROVIDER employee or independent consultant, as applicable, working in a professional manner. PROVIDER STAFF shall not be considered as having an employee status with BUYER or being entitled to participate in any plans or benefits of BUYER for its regular employees. The PROVIDER assumes full responsibility for all employment contributions, taxes, withholding, etc, under any state and local laws, as applicable.
- The PROVIDER shall invoice BUYER no more frequently than monthly, h. and no less than quarterly for the services provided for that period, based on actual hours worked and using the fully-burdened hourly rates for direct employees, and the approved billing rates for assigned consultant staff. Such fully-burdened hourly rates shall be specific to each position type, will be disclosed to BUYER in advance, and will be consistent with the labor rate in Exhibit "B". PROVIDER'S fully-burdened employee hourly rates shall include employee labor rates, fringe, benefits and overhead items such as workers' compensation, insurance, computers, office space and phone. For PROVIDER On-Call Consultants assigned to the Project, the PROVIDER shall invoice the BUYER the amount so billed from the On-Call Consultants during the invoice period. With each invoice, PROVIDER shall also identify any Project-related travel and other direct costs incurred by PROVIDER STAFF. Mileage shall be billed based on the current, approved Internal Revenue Service rate.

#### 3. BUYER Responsibilities

- a. BUYER shall direct and control the work activities of the PROVIDER STAFF and shall be responsible for providing a safe place to work in compliance with all safety laws and regulations while working at BUYERdesignated work site(s). BUYER is not responsible for the health or safety of any PROVIDER STAFF due to injuries or property damage caused by others not within the control of BUYER at any Project site.
- b. BUYER shall furnish PROVIDER STAFF a copy of applicable rules, regulations and policies that BUYER deems necessary to implement the provisions in Section 2.d above.
- c. BUYER strictly agrees that it shall not induce, passively, actively solicit, approach or hire any of the PROVIDER STAFF so long as this agreement is in effect and for a period of one (1) year thereafter except if mutually agreed in writing by PROVIDER, BUYER, and, if applicable, on-call consultants under contract, on a case by case basis.
- d. Upon receipt of the PROVIDER invoice, BUYER shall approve and make prompt payment on all invoices or explain in writing to the PROVIDER Contact identified in Section 4.f below, the reason for disapproval of any item within 10 business days of receipt. BUYER payment for undisputed invoice amounts shall be made within 30 days of receipt of invoice.

#### 4. PROVIDER and BUYER Responsibilities

- a. If PROVIDER STAFF is deemed by BUYER or the PROVIDER to be unqualified to perform the assignment contracted for, BUYER may request the removal of the PROVIDER STAFF.
- b. Neither PROVIDER nor any officer or employee or agent thereof is responsible for any injury, damage or liability occurring by reason of anything done or omitted to be done by BUYER and/or its agents under or in connection with any work, authority, or jurisdiction conferred upon BUYER under this Agreement. It is understood and agreed that BUYER will fully defend, indemnify, and save harmless PROVIDER and all of its officers, employees and agents from all claims, suits, or actions of every name, kind, and description brought forth under, but not limited to, tortious, contractual, inverse condemnation, or other theories or assertions of liability occurring by reason of anything done or omitted to be done by BUYER and/or its agents under this Agreement.
- c. Neither BUYER nor any officer or employee thereof is responsible for any injury, damage, or liability occurring by reason of anything done or omitted to be done by PROVIDER and/or its agents under or in connection with any work, authority, or jurisdiction conferred upon PROVIDER under this Agreement. It is understood and agreed that PROVIDER will fully defend, indemnify, and save harmless BUYER and all of its officers and employees from all claims, suits, or actions of every name, kind, and description brought forth under, but not limited to, tortious, contractual, inverse condemnation, or other theories or assertions of liability occurring by reason of anything done or omitted to be done by PROVIDER and/or its agents under this Agreement.
- d. Overtime hours shall be defined by the PROVIDER and approved by the BUYER, and PROVIDER STAFF shall not be directed by the BUYER to work Overtime hours, unless agreed to in writing by both Parties.
- e. This Agreement shall be construed and interpreted solely in accordance with the laws of the State of California.
- f. Whenever any notice is required to be in writing or authorized in writing, such notice may be sent by regular mail, email or FAX. Any such notice shall be addressed to:

Notices to PROVIDER: Name: Title: Address: City, State Zip: Email: FAX:

Notices to the BUYER: Name: Title: Address: City, State Zip: Email: FAX:

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement as of the day and year first above written.

# Name of PROVIDER Agency

## Name of BUYER Transit Agency

Ву:	Ву:
Name:	Name:
Title:	Title:
Date:	Date:
APPROVED AS TO FORM:	APPROVED AS TO FORM:
Name:	Name:
Title:	Title:

## SCOPE OF WORK

Insert a brief description of PROVIDER services to be provided and overall Project.

#### Task 1:

Deliverables

Schedule

## Task 1:

Deliverables

Schedule

## EXHIBIT "B" PROVIDER BILLING RATE SCHEDULE AND OTHER DIRECT COSTS FOR PROFESSIONAL SERVICES

PROVIDER Staff and/or On-Call Consultants likely to be assigned to Project, may include:

Position	Fully Burdened Hourly Rate*	Not-to- Exceed Hours	Total Costs
Subtotal			

\*These rates are based on current PROVIDER budgeted rates for fully burdened employees and On Call Consultants. Hourly rates are subject to change over time based on employee salary and benefit increases as well as Consultant contract costs.

Other Direct Costs anticipated during the course of Project, may include but not be limited to:

Expense Category	Units	Cost	Line Item Costs
Miles			
Travel			
Printing/shipping/postage			
Subtotal			

Subtotal Pro	ject Costs	

# MUTUAL AID MOU

Appendix D – Agreement/MOU Templates

#### MEMORANDUM OF UNDERSTANDING Between OMNITRANS and TRANSIT AGENCY For MUTUAL AID

**This Memorandum of Understanding** ("MOU") is effective on the Effective Date as defined herein, by and between Omnitrans ("OMNITRANS") whose address is 1700 West Fifth St., San Bernardino, California 92411, and Transit Agency ("TRANSIT AGENCY") whose address is address, City, State Zip. OMNITRANS and TRANSIT AGENCY are each a "Party" and collectively the "Parties" as identified herein.

#### **RECITALS:**

WHEREAS, TRANSIT AGENCY provides service that overlaps with the OMNITRANS service area and, should mutual aid be requested, it may be more timely and more cost-effective for OMNITRANS to respond to the incident; and

WHEREAS, the Parties desire to establish a mutual understanding to provide for OMNITRANS assistance should TRANSIT AGENCY experience a service interruption during the course of service provision in the OMNITRANS service area; and

**WHEREAS**, OMNITRANS agrees to assist upon request and if manpower and equipment resources are available; and

WHEREAS, Omnitrans shall place a high priority on responding to service disruptions which occur on TRANSIT AGENCY routes within OMNITRANS service areas, so long as such assistance does not negatively impact OMNITRANS' own transit operations; and

**WHEREAS**, this MOU shall supersede any and all previous service agreements.

**NOW, THEREFORE**, OMNITRANS and TRANSIT AGENCY in consideration of the mutual covenants hereinafter set forth and intending to be legally bound hereby agree as follows:

- Complete Agreement. This MOU, including any exhibits and documents incorporated herein and made applicable by reference, constitutes the complete and exclusive statement of the terms and conditions of the MOU between OMNITRANS and TRANSIT AGENCY, concerning the services provided, and supersedes all prior representations, understandings, and communications between the parties. The above-referenced Recitals are true and correct and are incorporated by reference herein.
- 2. **OMNITRANS Responsibilities**. OMNITRANS agrees to the following responsibilities for services provided:

- a. Services ("SERVICES") may include, but not be limited to, the provision of OMNITRANS' labor and/or consultants, installation of temporary signage, equipment including rolling stock, transit supervisor assistance/investigation services, coach operator services, maintenance services, tow services, bus storage, parts, and/or fuel.
- b. OMNITRANS shall perform SERVICES upon request by TRANSIT AGENCY, to the extent that OMNITRANS' manpower and equipment are available and such services provision does not interfere with OMNITRANS' own service provision.
- c. OMNITRANS will promptly notify TRANSIT AGENCY as soon as it is aware that its manpower and/or equipment will not be available to respond to the TRANSIT AGENCY service interruption or request.
- d. OMNITRANS shall submit an invoice to TRANSIT AGENCY for SERVICES provided, by no later than the last day of the month following the month that SERVICES were provided. Each Invoice shall specify the total hours by position or service type provided, as well as any other direct costs attributed to the SERVICE provision. The invoice shall be based on the hourly rates and direct expenses identified in Exhibit "A", Rate Schedule.
- e. OMNITRANS is acting as an independent contractor under this MOU and shall pay all wages, salaries, and other amounts due to their own personnel in connection with any and all SERVICES provided under this MOU, as well as that, which may be required by law. OMNITRANS shall be responsible for all reports and obligations respecting their own personnel, including, but not limited to social security taxes, income tax withholding, unemployment insurance, benefits and workers compensation insurance. OMNITRANS' employees or agents shall not be deemed TRANSIT AGENCY employees or agents for any purpose.
- f. OMNITRANS agrees to indemnify, defend and hold harmless TRANSIT AGENCY, its member agencies, officers, directors, employees, and agents from and against any and all claims (including attorney's fees and reasonable expenses for litigation or settlement) for any loss or damages, bodily injuries, including death, damage to or loss of use of property caused by the negligent acts, omissions, or willful misconduct by OMNITRANS, its officers, directors, employees, or agents in connection with or arising out of the performance of services under this MOU.
- 3. **TRANSIT AGENCY Responsibilities**. TRANSIT AGENCY agrees to the following responsibilities for services provided:
  - a. TRANSIT AGENCY management shall make a formal request for the specific OMNITRANS' SERVICES by calling the OMNITRANS Position at XXX-YYY-ZZZZ. OMNITRANS will make available the OMNITRANS Position 24 hours a day, 7 days a week, 365 days each year.
  - b. OMNITRANS Position on duty must approve each TRANSIT AGENCY SERVICE request.
  - c. Complete and accurate invoices submitted by OMNITRANS shall be paid by TRANSIT AGENCY within thirty (30) days of receipt.
  - d. TRANSIT AGENCY agrees to indemnify, defend and hold harmless OMNITRANS, its member agencies, officers, directors, employees, and agents

from and against any and all claims (including attorney's fees and reasonable expenses for litigation or settlement) for any loss or damages, bodily injuries, including death, damage to or loss of use of property caused by the negligent acts, omissions, or willful misconduct by TRANSIT AGENCY, its officers, directors, employees, or agents in connection with or arising out of the performance of this MOU.

- 4. **The Parties Mutually Understand and Agree** to the following mutual responsibilities regarding the SERVICE:
  - a. This MOU shall commence upon execution by the Parties, and shall continue in full force until the MOU end date and/or unless terminated as provided in this MOU.
  - b. This MOU may be amended in writing at any time by the mutual consent of the Parties. No amendment shall have any force or effect unless executed in writing by the Parties.
  - c. OMNITRANS or TRANSIT AGENCY may terminate this MOU, without cause, by delivering written notice of termination to the other Party not less than sixty (60) calendar days before the date of termination.
  - d. The persons executing this MOU on behalf of the parties hereto warrant that they are duly authorized to execute this MOU on behalf of said parties and that, by so executing this MOU, the parties hereto are formally bound to the provisions of this MOU.
  - e. All notices hereunder and communications required or permitted by this MOU, or changes thereto, or by law to be served on, given to or delivered to any other Party hereto by any other Party to this MOU shall be in writing or authorized in writing, and may be sent by regular mail, email or FAX. Any such notice shall be addressed to:

Notices to OMNITRANS: Name: Title: Address: City, State Zip: Email: FAX: Notices to TRANSIT AGENCY: Name: Title: Address: City, State Zip: Email: FAX:

f. The headings of all sections of this MOU are inserted solely for the convenience of reference and are not part of and not intended to govern, limit, or aid in the construction or interpretation of any terms or provision thereof.

- g. The provision of this MOU shall bind and insure to the benefit of each of the parties hereto and all successors or assigns of the parties hereto.
- h. If any term, provision, covenant, or condition of this MOU is held to be invalid, void or otherwise unenforceable, to any extent, by any court of competent jurisdiction, the remainder to this MOU shall not be affected thereby, and each term, provision, covenant or condition of this MOU shall be valid and enforceable to the fullest extent permitted by law.
- i. This MOU may be executed and delivered in any number of counterparts, each of which, when executed and delivered shall be deemed an original and all of which together shall constitute the same MOU. Facsimile signatures will be permitted.
- j. Neither this MOU, nor any of a Party's rights, obligations or duties hereunder may be assigned in whole or in part by either Party without the prior written consent of the other Party. Any such attempt of assignment shall be deemed void and of no force and effect. Consent to one assignment shall not be deemed consent to any subsequent assignment, nor the waiver of any right to consent to such subsequent assignment.
- k. The Parties warrant that, in the performance of this MOU, they shall comply with all applicable federal, state and local laws, statutes and ordinances and lawful orders, rules and regulations promulgated thereunder.
- I. Either Party shall be excused from performing its obligations under this MOU during the time and to the extent that it is prevented from performing by an unforeseeable cause beyond its control, including but not limited to: any incidence of fire, flood, acts of God, commandeering of material, products, plants or facilities by the federal, state or local government, national fuel shortage, or a material act or omission by the other party, when satisfactory evidence of such cause is presented to the other party, and provided further that such nonperformance is unforeseeable, beyond the control and is not due to the fault or negligence of the party not performing.
- m. This MOU has a not-to-exceed amount of \$XX,YYY, and a period of three (3) years from the effective date of this MOU, and may be extended by the Parties for an additional three (3) year period with mutual consent. The Amount shall not be exceeded unless amended in writing by the mutual consent of the Parties.
- n. This MOU shall be construed and interpreted solely in accordance with the laws of the State of California.

**IN WITNESS WHEREOF**, this MOU constitutes the entire understanding of the Parties hereto, and there are no other requirements, premises, warranties, covenants or undertakings with respect thereto, and have made and executed this MOU as of the day and year first above written.

OMNITRANS

TRANSIT AGENCY

Ву:\_\_\_\_\_

Ву:\_\_\_\_\_

Appendix D – Agreement/MOU Templates

Name:	Name:
Title:	Title:
Date:	Date:
APPROVED AS TO FORM:	APPROVED AS TO FORM:
Name:	Name:
Title:	Title:

# Exhibit "A", Rate Schedule

# OMNITRANS' RATE SCHEDULE AND OTHER DIRECT COSTS

Below is a list of OMNITRANS Positions that may likely be assigned to a Mutual Aid request:

Position and/or Service	Fully Burdened Hourly Rate* or Fully-Allocated Cost

\*These rates are based on current OMNITRANS budgeted rates for fully burdened employees. Hourly rates are subject to change over time based on employee salary and benefit increases. Other Direct Costs anticipated, may include but not be limited to:

Expense Category	Units	Cost
40' Ft. Bus and Operator	Hourly Rate	
Access Van and Operator	Hourly Rate	

# INTERAGENCY SERVICES COOPERATIVE AGREEMENT

Appendix D – Agreement/MOU Templates

#### INTERAGENCY COOPERATIVE SERVICE AGREEMENT Between TRANSIT AGENCY NO. 1 and TRANSIT AGENCY NO. 2

**This Cooperative Agreement** ("AGREEMENT") is effective on the Effective Date as defined herein, by and between Transit Agency No. 1 ("NO1") whose address is address, City, California Zip, and the Transit Agency No. 2 ("NO2") whose address is address, City, California Zip. NO1 and NO2 are each a "Party" and collectively the "Parties" as identified herein.

**RECITALS:** {Comment: some may not apply, below is a menu based on type of Agreement – delete those that are N/A}

WHEREAS, NO1 and NO2 are community transit operators in {identify counties} County and this region is an integrated economic entity resulting in travel demands not necessarily constrained by transit agency jurisdictional boundaries; and

WHEREAS, to efficiently serve the regional travel demands, it may be necessary for one transit operator to subsidize fares with another operator to operate service into another operator's service area; and

WHEREAS, in the absence of an Interagency Cooperative Service Agreement, passengers originating on NO1's system, and desiring to transfer to NO2 system must pay a second originating fare on NO2's services; and

WHEREAS, the Parties desire to enter into this AGREEMENT to facilitate transfer service planning and interagency coordination between the Parties' systems and thereby provide greater convenience and mobility for public transportation users; and

WHEREAS, the transit operators within this community are obligated to provide the general public with safe convenient public transportation by coordinating and cooperating with the provision of transfer privileges and transit information consistent with the rules and regulations concerning the transfers between public transportation services approved by the County's Transportation Commission, the San Bernardino Associated Governments (SANBAG); and

**WHEREAS**, the Parties have expressed a desire to continue and enhance cooperative efforts for the provision of public transit; and

WHEREAS, this AGREEMENT shall supersede any and all previous service agreements.

**NOW, THEREFORE**, NO1 and NO2 in consideration of the mutual covenants hereinafter set forth and intending to be legally bound hereby agree as follows:

- 1. AGREEMENT Term. The term of this AGREEMENT shall be effective Month Day, Year and will remain in effect until terminated or amended by the Parties providing a sixty (60) day written notice to the other party.
- 2. Services to be Operated. {Comment: below are examples of the type of language that could be included, dependent upon the arrangement and if a monetary exchange, if any delete those that are N/A }
  - a. NO1 provides transit service ... {insert brief description of the service provided in NO2's service area and if there are any other MOUs with other operators if schedules/map, attach and reference).
  - b. NO2 provides transit service ... {insert brief description of the service that overlaps with NO2's service area and if there are any other MOUs with other operators if schedules/map, attach and reference).
  - c. NO1 shall accept NO2's transfer media and monthly passes valued at NO2's base fare for that service (or higher) towards NO1's XXX service. In the event that NO2's base fare is valued at more than NO1's base fare, no change or credit will be due the passenger.
  - d. NO2 shall accept NO1's transfer media and monthly passes valued at NO1's base fare for that service (or higher) towards NO2's XXX service In the event that NO1's base fare is valued at more than NO2's base fare, no change or credit will be due the passenger.
  - e. Transfer media from NO1 shall only be valid on NO2's XXX service. Transfer media from NO2 shall only be valid on NO1's XXX service.
  - f. The Parties shall accept the other Party's valid employee passes, dependent passes and retiree passes on all XXX service in lieu of payment of a fare.

#### 3. Stops.

- a. The Parties agree to cooperate in the location, installation and maintenance of all jointly used bus stops, including use of the other Party's poles and posts at joint transfer points.
- b. Each Party agrees to be solely responsible for claims or damages arising out of its installation of its bus stop signs or passenger amenities.
- c. The Parties agree to the establishment of stops in the other's service area, subject to approval of each specific stop.
- d. The Parties may negotiate regarding boarding restrictions within their respective service areas where duplication of service or potential revenue loss may occur.
- e. The Parties shall be responsible for obtaining any required licenses or permits and paying any necessary fees in order to establish bus stops, install amenities or operate service in either service area.
- 4. Operational Information. The Parties agree to facilitate minimization of passenger waiting time, and shall coordinate schedules for connecting routes whenever practical. The Parties shall inform the other of future plans for new routes, schedules and fares, exclusive of temporary demand and/or emergencies that would affect either party in their operating area. Each Party shall provide, upon request, data that is readily available including passenger boardings and alightings by stop.

- **5.** Changes in Service. Either party may, upon sixty (60) days written notice, make service changes which affect the other party to this AGREEMENT.
- 6. Public Information. Each party shall cooperate, to the extent feasible, in providing the general public with specific transit information and in advertising of operations of both Parties' services, in promoting the general use of public transit.
- 7. Fares. Fares may vary in accordance with the adopted policies of each party. The operator of a service shall retain all fares and other revenues collected with respect to that service. The Parties shall notify each other within thirty (30) days in advance of adopting any fare changes that might affect any aspect of transfer privileges.
- 8. Claims/Payments. {non monetary agreement} There shall be no payment by either party to the other for claims for fare revenues collected by either party. There shall be no reimbursement of operating expenses by either party.
- 9. Invoicing. {for a monetary agreement remove if N/A and there is no monetary exchange}
  - a. For billing purposes, "transferring passengers" shall be defined as the total number of passengers transferring between NO1 and NO2 from whom NO1 collected no fares.
  - b. NO1 shall provide the number of transferring passengers between NO1's system and NO2's service using ridership counts conducted by NO1.
  - c. NO1 shall submit monthly invoices to NO2 for the reimbursement of transfers. Invoices for the calendar month shall be submitted by the following month by the last day of that month. Invoices shall specify the total number of NO2 transfers by route and the amount billed based upon current fares identified, and the agreed reimbursement rate specified in this AGREEMENT.
  - d. Complete and accurate invoices shall be paid by NO2 within thirty (30) days of receipt.
  - e. Disagreements concerning the number of passengers identified in any monthly invoice or transfer trends, shall be resolved by making a good faith effort to create a joint survey team, to include a representatives of the Parties, whose task it would be to conduct a passenger survey to determine transfer rates.

#### 10. Indemnification.

- a. NO1, acting as an independent contractor, agrees to indemnify and hold NO2 harmless from and against all losses, damages, actions and expenses (including attorney's fees) on account of bodily injury to or death of any person or damage to or loss of use of property incident to or arising from operations of NO1 service under the terms of this AGREEMENT.
- b. NO2, acting as an independent contractor, agrees to indemnify and hold NO1 harmless from and against all losses, damages, actions and expenses (including attorney's fees) on account of bodily injury to or death of any person or damage to or loss of use of property incident to or arising from operations of NO2 service under the terms of this AGREEMENT.
- **11. Venue**. This AGREEMENT shall be construed and interpreted solely in accordance with the laws of the State of California.

**12. Notices**. Whenever any notice is required to be in writing or authorized in writing, such notice may be sent by regular mail, email or FAX. Any such notice shall be addressed to:

Notices to NO1: Name: Title: Address: City, State Zip: Email: FAX: Notices to NO2: Name: Title: Address: City, State Zip: Email: FAX:

**IN WITNESS WHEREOF**, this AGREEMENT constitutes the entire understanding of the Parties hereto, and there are no other requirements, premises, warranties, covenants or undertakings with respect thereto, and have made and executed this AGREEMENT as of the day and year first above written.

NO1	NO2
Ву:	Ву:
Name:	Name:
Title:	Title:
Date:	Date:
APPROVED AS TO FORM:	APPROVED AS TO FORM:
Name:	Name:
Title:	Title: