

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

BOARD OF DIRECTORS REGULAR MEETING AGENDA  
FEBRUARY 13, 2009 (Second Friday of Each Month)  
\*SCMTD ENCINAL CONFERENCE ROOM\*  
\*370 ENCINAL STREET, SUITE 100\*  
SANTA CRUZ, CALIFORNIA  
9:00 a.m. – 11:00 a.m.

THE BOARD AGENDA PACKET CAN BE FOUND ONLINE AT [WWW.SCMTD.COM](http://WWW.SCMTD.COM) OR  
AT METRO'S ADMINISTRATIVE OFFICES LOCATED AT 370 ENCINAL STREET, SUITE  
100, SANTA CRUZ, CA

**NOTE: THE BOARD CHAIR MAY TAKE ITEMS OUT OF ORDER**

## SECTION I: OPEN SESSION - 9:00 a.m.

1. ROLL CALL
2. ORAL AND WRITTEN COMMUNICATION TO THE BOARD OF DIRECTORS
  - a. None
3. LABOR ORGANIZATION COMMUNICATIONS
4. ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS

## CONSENT AGENDA

- 5-1. ACCEPT AND FILE PRELIMINARILY APPROVED CLAIMS FOR THE MONTH OF JANUARY 2009
- 5-2. ACCEPT AND FILE MONTHLY BUDGET STATUS REPORT FOR DECEMBER 2008
- 5-3. CONSIDERATION OF TORT CLAIMS: None
- 5-4. ACCEPT AND FILE THE METRO ADVISORY COMMITTEE (MAC) AGENDA FOR FEBRUARY 18, 2009 AND MINUTES OF DECEMBER 16, 2008
- 5-5. ACCEPT AND FILE PARACRUZ OPERATIONS STATUS REPORT FOR THE MONTH OF NOVEMBER 2008
- 5-6. ACCEPT AND FILE HIGHWAY 17 STATUS REPORT FOR NOVEMBER & DECEMBER 2008
- 5-7. ACCEPT AND FILE NOVEMBER & DECEMBER 2008 RIDERSHIP REPORT

- 5-8. ACCEPT AND FILE UNIVERSITY OF CALIFORNIA, SANTA CRUZ SERVICE UPDATE FOR THE MONTHS OF NOVEMBER & DECEMBER 2008
- 5-9. ACCEPT AND FILE METROBASE PROJECT STATUS REPORT
- 5-10. CONSIDERATION OF AUTHORIZING THE GENERAL MANAGER TO EXECUTE A CONTRACT RENEWAL WITH CRUZ CAR WASH FOR PARACRUZ VEHICLE WASHING SERVICES
- 5-11. CONSIDERATION OF AUTHORIZING THE GENERAL MANAGER TO EXECUTE A CONTRACT RENEWAL WITH STEVE'S UNION FOR PARACRUZ VEHICLE FUELING SERVICES
- 5-12. CONSIDERATION OF AUTHORIZING THE GENERAL MANAGER TO EXECUTE A CONTRACT RENEWAL WITH DIXON AND SON TIRES, INC. FOR PURCHASE OF REVENUE AND NON-REVENUE TIRES
- 5-13. CONSIDERATION OF AUTHORIZING THE GENERAL MANAGER TO EXTEND THE CONTRACT WITH PAT PIRAS CONSULTING FOR REVIEW OF THE ADA PARATRANSIT ELIGIBILITY PROCESS
- 5-14. CONSIDERATION OF A RESOLUTION AUTHORIZING TWO NEW SIGNERS ON THE DEPOSIT ACCOUNT FOR THE ADMINISTRATION OF APPROVED WORKERS' COMPENSATION CLAIMS WITH COMERICA BANK
- 5-15. CONSIDERATION OF AN AGREEMENT WITH SANTA CRUZ SEASIDE COMPANY FOR THE PROVISION OF LATE NIGHT SERVICE
- 5-16. CONSIDERATION OF RECLASSIFICATION OF SENIOR ACCOUNTING TECHNICIAN TO PURCHASING ASSISTANT
- 5-17. CONSIDERATION OF AUTHORIZING THE GENERAL MANAGER TO EXECUTE A CONTRACT AMENDMENT FOR A CHANGE ORDER IN THE AMOUNT OF NOT-TO-EXCEED \$2,688.70 FROM JOS. J. ALBANESE TO PROVIDE ADDITIONAL FUNDS TO THE DEMOLITION CONTRACT TO ACCOMMODATE COSTS RELATING TO UNFORESEEN SOILS CONDITION CAUSED BY THE WET WEATHER CONDITIONS

#### **REGULAR AGENDA**

- 6. PRESENTATION OF EMPLOYEE LONGEVITY AWARDS  
Presented by: Chair Bustichi  
**THIS PRESENTATION WILL TAKE PLACE AT THE FEBRUARY 27, 2009 BOARD MEETING**

7. PUBLIC HEARING: CONSIDERATION OF ADOPTION OF THE FY 2008 – FY 2012 SHORT RANGE TRANSIT PLAN  
Presented By: Angela Aitken, Finance Manager  
**PUBLIC HEARING WILL TAKE PLACE AT THE FEBRUARY 27, 2009 BOARD MEETING**
8. CONSIDERATION OF APPROVAL OF **RESOLUTION** OF APPRECIATION FOR THE SERVICES OF KIRBY NICOL AS A MEMBER OF THE BOARD OF DIRECTORS OF THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
Presented by: Chair Bustichi  
**THIS PRESENTATION WILL TAKE PLACE AT THE FEBRUARY 27, 2009 BOARD MEETING**
9. CONSIDERATION OF DECLINING JOB ACCESS REVERSE COMMUTE GRANT FUNDING  
Presented By: Angela Aitken, Finance Manager
10. CONSIDERATION OF PROVIDING DIRECTION TO METRO STAFF REGARDING A BUS STOP BENCH AND/OR SHELTER DONATION PROGRAM INCLUDING ALLOWING DONORS TO PLACE THEIR NAMES OR BUSINESS LOGOS ON THE DONATED FACILITIES  
Presented By: Margaret Gallagher, District Counsel  
**ACTION REQUESTED AT THE FEBRUARY 13, 2009 BOARD MEETING**
11. CONSIDERATION OF AUTHORIZING THE GENERAL MANAGER TO EXECUTE A CONTRACT WITH JACIBO ENTERPRISES, LLC FOR REDESIGN AND IMPLEMENTATION OF METRO'S WEB SITE  
Presented By: Angela Aitken, Finance Manager  
**ACTION REQUESTED AT THE FEBRUARY 13, 2009 BOARD MEETING**
12. ORAL ANNOUNCEMENT: NOTIFICATION OF MEETING LOCATION FOR FEBRUARY 27, 2009 – WATSONVILLE CITY COUNCIL CHAMBERS, 275 MAIN STREET, WATSONVILLE  
Presented By: Vice Chair Pirie  
**ACTION REQUESTED AT THE FEBRUARY 13, 2009 BOARD MEETING**
13. REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION: District Counsel
14. ORAL AND WRITTEN COMMUNICATIONS REGARDING CLOSED SESSION

## **SECTION II: CLOSED SESSION**

1. CONFERENCE WITH LEGAL COUNSEL – EXISTING LITIGATION  
(Pursuant to Government Code Section 54956.9)
  - a. Name of Case: Kimberly Hodge vs. Santa Cruz Metropolitan Transit District

**SECTION III: RECONVENE TO OPEN SESSION**

15. REPORT OF CLOSED SESSION

**ADJOURN**

**NOTICE TO PUBLIC**

Members of the public may address the Board of Directors on a topic not on the agenda but within the jurisdiction of the Board of Directors or on the consent agenda by approaching the Board during consideration of Agenda Item #2 "Oral and Written Communications", under Section I. Presentations will be limited in time in accordance with District Resolution 69-2-1.

When addressing the Board, the individual may, but is not required to, provide his/her name and address in an audible tone for the record.

Members of the public may address the Board of Directors on a topic on the agenda by approaching the Board immediately after presentation of the staff report but before the Board of Directors' deliberation on the topic to be addressed. Presentations will be limited in time in accordance with District Resolution 69-2-1.

The Santa Cruz Metropolitan Transit District does not discriminate on the basis of disability. The Encinal Conference Room is located in an accessible facility. Any person who requires an accommodation or an auxiliary aid or service to participate in the meeting, please contact Cindi Thomas at 831-426-6080 as soon as possible in advance of the Board of Directors meeting. Hearing impaired individuals should call 711 for assistance in contacting METRO regarding special requirements to participate in the Board meeting.

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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 ALL CHECKS FOR ACCOUNTS PAYABLE

DATE: 01/01/09 THRU 01/31/09

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
31010M01/22/09		-375.00	001244	CSA AMERICA		23580	CERTIFICATION EXAM	-375.00	**VOID
31011M01/22/09		-375.00	001244	CERTIFICATION EXAM CSA AMERICA		23581	CERTIFICATION EXAM	-375.00	**VOID
31276	01/22/09	-198.00	E635	KINSLOW, DEBBIE		23972	11/24 EMP TRAVEL	-198.00	**VOID
31478	01/02/09	3,250.00	001248	ARMSTRONG PAINTING	7	24525	PAINTING/1217 RIVER	3,250.00	
31479	01/02/09	7.78	123	BAY PHOTO LAB		24362	PHOTO PROCES/PT	7.78	
31480	01/02/09	24.41	001112	BRINKS AWARDS & SIGNS	7	24360	NAME BADGE/OPS	24.41	
31481	01/02/09	460,121.70	502	CA PUBLIC EMPLOYEES'		24503	JAN MED INS	460,121.70	
31482	01/02/09	2,127.00	001249	CINDERELLA CARPET ONE		24520	CARPET/MB 1217 RIVER	698.00	
						24521	CARPET/MB 1217 RIVER	1,429.00	
31483	01/02/09	197.47	002389	DARCO PRINTING	7	24359	OFFICE SUPPLY/OPS	197.47	
31484	01/02/09	1,387.82	001316	DEVCO OIL		24523	GENERATOR/GOLF/MB	1,387.82	
31485	01/02/09	257.47	372	FEDERAL EXPRESS		24513	DEC SHIPPING	257.47	
31486	01/02/09	3,516.48	878	KELLY SERVICES, INC.		24509	TEMP/OPS W/E 12/7	1,761.60	
						24510	TEMP/OPS W/E 12/14	1,754.88	
31487	01/02/09	25.00	074	KENVILLE LOCKSMITHS	7	24522	CUT KEYS/MB GOLF CLB	25.00	
31488	01/02/09	690.45	852	LAW OFFICES OF MARIE F. SANG	7	24514	WORKERS COMP CLAIM	690.45	
31489	01/02/09	17.86	001936	MCI		24511	OCT PHONES	17.86	
31490	01/02/09	56.52	041	MISSION UNIFORM		24322	UNIF/LAUNDRY/FAC	56.52	
31491	01/02/09	14,208.33	001225	NATIONAL SECURITY SERVICE		24504	NOV SECURITY	5,772.00	
						24505	NOV SECURITY	3,404.00	
						24506	NOV SECURITY	1,739.00	
						24507	NOV SECURITY	1,480.00	
						24508	NOV SECURITY	1,813.33	
31492	01/02/09	26.03	043	PALACE ART & OFFICE SUPPLY		24346	OFFICE SUPPLY/MTC	26.03	
31493	01/02/09	95.28	135	SANTA CRUZ AUTO PARTS, INC.		24316	REV VEH PARTS	95.28	
31494	01/02/09	768.96	001232	SPECIALIZED AUTO AND		24376	OUT RPR REV VEH	709.61	
						24377	OUT RPR REV VEH	59.35	
31495	01/02/09	285.51	436	WEST PAYMENT CENTER		24512	SEPT ACCESS CHARGES	285.51	
31496M01/06/09		1,354.20	T172	LEWIS, ADAM		24699	SEC DEP/1217-D RIVER	1,354.20	MANUAL
				SEC DEP/1217-D RIVER					
31497	01/09/09	208.64	001188	AFV FLEET SERVICE		24635	REV VEH PARTS	112.22	
						24636	REV VEH PARTS	96.42	
31498	01/09/09	254.57	002861	AMERICAN MESSAGING SVCS, LLC		24682	JAN PAGERS	254.57	
31499	01/09/09	16,763.57	941	ASSURANT EMPLOYEE BENEFITS		24663	JAN LTD INS	16,763.57	
31500	01/09/09	1,770.93	001	AT&T		24670	REPEATER/RIVER	85.10	
						24684	PHONES/138 GOLF	1,685.83	
31501	01/09/09	4,474.48	001B	AT&T/MCI		24746	NOV PHONES	4,474.48	
31502	01/09/09	12.73	123	BAY PHOTO LAB		24536	PHOTO PROCESS/PT	12.73	
31503	01/09/09	100.00	B003	BEAUTZ, JAN	7	24748	DEC BOARD MTGS	100.00	
31504	01/09/09	1,920.00	478	BEE CLENE	0	24543	CARPET/RESEARCH PARK	435.00	
						24544	CARPET/PACIFIC	375.00	
						24596	CARPET - ENCINAL	735.00	
						24685	CARPET/OPS	375.00	
31505	01/09/09	620.08	001112	BRINKS AWARDS & SIGNS	7	24527	BOD NAMEPLATE	29.84	
						24759	PLATE/PLAQUE/ADM	305.97	
						24760	PLATE/PLAQUE/ADMIN	284.27	
31506	01/09/09	100.00	B018	BUSTICHI, DENE	7	24749	DEC BOARD MTGS	100.00	

5-1.1

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31507	01/09/09	120.00	014	CABRILLO COLLEGE		24735	OCT FINGERPRINTING	120.00	
31508	01/09/09	214.00	002479	CENTRAL EQUIPMENT SERVICE CO.		24548	LIFT REPAIR	214.00	
31509	01/09/09	33.41	172	CENTRAL WELDER'S SUPPLY, INC.		24637	PARTS & SUPPLIES	33.41	
31510	01/09/09	100.00	B014	CITY OF WATSONVILLE		24758	DEC BOARD MTGS	100.00	
31511	01/09/09	249.75	001113	CLARKE, SUSAN	7	24601	EXT BUS ANNOUN/AUDIT	125.00	
						24602	EXT BUS ANNOUN/AUDIT	124.75	
31512	01/09/09	7,416.39	909	CLASSIC GRAPHICS		24542	OUT RPR # 2206	2,335.00	
						24642	OUT RPR # 9827	5,081.39	
31513	01/09/09	27,040.23	001124	CLEAN ENERGY		24631	DEC LNG/FLT	20,138.21	
						24643	12/19 LNG/FLT	6,902.02	
31514	01/09/09	300.00	002448	CLEAR VIEW, LLC	0	24678	WINDOWS/WTC	300.00	
31515	01/09/09	184.00	367	COMMUNITY TELEVISION OF		24557	TV COVERAGE 11/21	184.00	
31516	01/09/09	106.27	002063	COSTCO		24524	LOCAL MTG EXP	51.73	
						24528	LOCAL MTG EXP	30.43	
						24558	PHOTO PROCESS/OPS	4.07	
						24559	PHOTO PROCESS/OPS	3.14	
						24560	PHOTO PROCESS/OPS	2.15	
						24561	PHOTO PROCESS/OPS	9.57	
						24562	PHOTO PROCESS/OPS	2.00	
						24563	PHOTO PROCESS/OPS	3.18	
31517	01/09/09	9.64	418	COUNTY OF SANTA CRUZ		24597	NOV CNG/GLT	9.64	
31518	01/09/09	1,426.55	504	CUMMINS WEST, INC.		24587	REV VEH PARTS	395.32	
						24658	REV VEH PARTS	1,031.23	
31519	01/09/09	1,149.69	001000	DAIMLER BUSES N. AMERICA INC.		24627	REV VEH PARTS	1,149.69	
31520	01/09/09	4,139.90	157	DELL MARKETING L.P.		24610	MEMORY MODULE	26.17	
						24611	OFFICE SUPPLY/IT	371.05	
						24612	3 PACK CARTRIDGE/IT	437.46	
						24613	POWEREDGE 840 SERVER	3,305.22	
31521	01/09/09	40,098.99	800	DELTA DENTAL PLAN		24662	JAN DENTAL	40,098.99	
31522	01/09/09	5,858.23	001316	DEVCO OIL		24585	12/05 DIESEL/FLT	4,073.90	
						24622	12/1-12/15 FUEL/FLT	1,784.33	
31523	01/09/09	100.00	002624	DIGITAL RECORDERS		24659	REV VEH PARTS	100.00	
31524	01/09/09	8,890.37	085	DIXON & SON TIRE, INC.		24570	TIRES & TUBES	343.14	
						24707	TIRES & TUBES	33.00	
						24708	TIRES & TUBES	55.80	
						24709	TIRES & TUBES	174.60	
						24710	TIRES & TUBES	2,936.57	
						24711	TIRES & TUBES	1,266.30	
						24712	TIRES & TUBES	1,691.57	
						24713	TIRES & TUBES	1,071.36	
						24714	TIRES & TUBES	1,318.03	
31525	01/09/09	1,535.07	001183	ECOLAB VEHICLE CARE DIVISION		24664	REPAIRS/MAINTENANCE	1,535.07	
31526	01/09/09	90.25	298	ERGOMETRICS		24738	SCORING SERVICES	90.25	
31527	01/09/09	4,107.46	001492	EVERGREEN OIL INC.		24665	HAZ WASTE DISP	2,895.00	
						24666	HAZ WASTE DISP	1,187.46	
						24669	HAZ WASTE DISP	25.00	
31528	01/09/09	1,500.00	490	FAST RESPONSE ON-SITE		24625	PROF SVCS	1,500.00	
31529	01/09/09	235.00	001189	GARY KENVILLE LOCKSMITH	7	24591	SVC/1200 B RIVER	135.00	
						24592	SVC/RESEARCH PARK	100.00	
31530	01/09/09	59.15	647	GFI GENFARE		24623	REV VEH PARTS	59.15	

5-1.2

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31531	01/09/09	700.11	001029	GOLDEN GATE SYSTEMS	0	24599	OFFICE SUPPLY	700.11	
31532	01/09/09	23.50	T175	GOTTESMAN, DONALD		24763	FAREBOX REFUND	23.50	
31533	01/09/09	50.00	B023	GRAVES, RON		24753	DEC BOARD MTG	50.00	
31534	01/09/09	72.60	001242	GREEN VALLEY INDUSTRIAL SUPPLY		24565	REPAIRS/MAINTENANCE	72.60	
31535	01/09/09	100.00	B021	HAGEN, DONALD N.	7	24750	DEC BOARD MTGS	100.00	
31536	01/09/09	3,669.16	001745	HARTFORD LIFE AND ACCIDENT INS		24516	JAN LIFE/AD&D INS	3,669.16	
31537	01/09/09	50.00	B006	HINKLE, MICHELLE	7	24751	DEC BOARD MTGS	50.00	
31538	01/09/09	1,554.96	166	HOSE SHOP, THE		24593	REPAIRS/MAINTENANCE	12.78	
						24594	PARTS & SUPPLIES	527.04	
						24680	REPAIRS/MAINTENANCE	693.16	
						24681	REPAIRS/MAINTENANCE	321.98	
31539	01/09/09	781.20	001209	IKON FINANCIAL SERVICES		24607	1/09-3/09 LEASE/OPS	781.20	
31540	01/09/09	282.21	215	IKON OFFICE SOLUTIONS		24761	11/19-12/19 MAINT	197.58	
						24768	OFFICE SUPPLY/ADM	84.63	
31541	01/09/09	32.28	1117	KELLEY'S SERVICE INC.		24547	REV VEH PARTS	12.22	
						24639	REV VEH PARTS	20.06	
31542	01/09/09	416.00	074	KENVILLE LOCKSMITHS	7	24741	MAINT FACILITY/GOLF	416.00	
31543	01/09/09	2,221.78	167	KEYSTON BROTHERS		24630	OTH MOB SUPPLIES	2,090.15	
						24725	REV VEH PARTS	146.63	
						24726	CREDIT NOTE	-15.00	
31544	01/09/09	5,052.48	001233	KIMBALL MIDWEST		24614	PARTS & SUPPLIES	1,053.63	
						24616	PARTS & SUPPLIES	170.42	
						24629	PARTS & SUPPLIES	815.62	
						24644	PARTS & SUPPLIES	1,471.80	
						24645	PARTS & SUPPLIES	1,080.66	
						24646	PARTS & SUPPLIES	150.82	
						24647	PARTS & SUPPLIES	32.88	
						24648	PARTS & SUPPLIES	276.65	
31545	01/09/09	10,080.56	002240	KLEEN-RITE PRESSURE WASHERS	7	24698	PRESSURE WASHER	10,080.56	
31546	01/09/09	150.00	852	LAW OFFICES OF MARIE F. SANG	7	24517	WORKERS COMP CLAIM	90.00	
						24518	WORKERS COMP CLAIM	60.00	
31547	01/09/09	14,500.00	001235	LOCATELLI MOVING & STORAGE INC		24526	LABOR/MAT/EQUIP/GOLF	14,500.00	
31548	01/09/09	834.60	001145	MANAGED HEALTH NETWORK		24743	JAN EAP PREMIUM	834.60	
31549	01/09/09	194.01	001296	MATTHEW BENDER & CO., INC.		24588	EMP LAW # 20	194.01	
31550	01/09/09	34.81	001936	MCI		24745	NOV PHONES/ RIVER	34.81	
31551	01/09/09	236.32	001052	MID VALLEY SUPPLY		24655	CLEANING SUPPLIES	236.32	
31552	01/09/09	1,123.06	041	MISSION UNIFORM		24552	UNIF/LAUNDRY/FLT	299.17	
						24553	UNIF/LAUNDRY/FLT	43.26	
						24554	UNIF/LAUNDRY/FLT	50.60	
						24555	UNIF/LAUNDRY/FLT	127.26	
						24576	UNIF/LAUNDRY/FLT	299.17	
						24577	UNIF/LAUNDRY/FLT	50.60	
						24578	UNIF/LAUNDRY/FLT	43.26	
						24579	UNIF/LAUNDRY/FLT	151.51	
						24580	UNIF/LAUNDRY/FAC	58.23	
						24564	DMV FEES	34.00	
31553	01/09/09	34.00	E295	MOREAU, DAVID		24752	DEC BOARD MTG	50.00	
31554	01/09/09	50.00	B020	NICOL, KIRBY	7	24660	REV VEH PARTS	69.44	
31555	01/09/09	69.44	004	NORTH BAY FORD LINC-MERCURY		24546	FIRE SENSOR SVC	2,651.00	
31556	01/09/09	2,651.00	001176	NORTHSTAR, INC.		24727	11/25-12/24 DUBOIS	14.24	
31557	01/09/09	8,959.41	009	PACIFIC GAS & ELECTRIC					

5-1.3

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						24728	11/23-12/24 ENCINAL	3,032.99	
						24729	11/23-12/24 VERNON	1,633.01	
						24730	11/25-12/24 DUBOIS	149.69	
						24731	11/23-12/24 RIVER	231.96	
						24732	11/23-12/24 RIVER	1,650.78	
						24733	11/25-12/24 DUBOIS	16.74	
						24762	11/27-12/29 PACIFIC	2,149.14	
						24767	11/23-12/24 MB	80.86	
31558	01/09/09	131.68	043	PALACE ART & OFFICE SUPPLY		24515	OFFICE SUPPLY/FIN	76.66	
						24672	OFFICE SUPPLIES/FIN	55.02	
31559	01/09/09	216.00	001149	PREFERRED PLUMBING, INC.		24566	SERVICE/CAFE LENA	216.00	
31560	01/09/09	28.95	107A	PROBUILD		24675	REPAIRS/MAINTENANCE	17.88	
						24676	REPAIRS/MAINTENANCE	1.07	
						24737	REPAIRS/MAINTENANCE	10.00	
31561	01/09/09	8,650.00	942	PROFFPOINT, INC.		24609	LIC FEES/HARDWARE/IT	8,650.00	
31562	01/09/09	94.70	002708	R.C.A. RUBBER COMPANY		24586	REV VEH PARTS	94.70	
31563	01/09/09	125.66	087	RECOGNITION SERVICES		24556	EMP INCENTIVE	125.66	
31564	01/09/09	100.00	B022	ROBINSON, LYNN MARIE		24754	DEC BOARD MTGS	100.00	
31565	01/09/09	100.00	B015	ROTKIN, MIKE	7	24755	DEC BOARD MTGS	100.00	
31566	01/09/09	309.16	045	ROYAL WHOLESALE ELECTRIC		24673	REPAIRS/MAINTENANCE	309.16	
31567	01/09/09	11,087.17	966	S.C. FUELS	0	24632	12/17 DIESEL/FLT	11,087.17	
31568	01/09/09	1,027.98	001379	SAFETY-KLEEN		24679	HAZ WASTE DISP	1,027.98	
31569	01/09/09	478.91	018	SALINAS VALLEY FORD SALES		24567	REV VEH PARTS	478.91	
31570	01/09/09	1,218.55	002713	SANTA CRUZ AUTO TECH, INC.		24534	OUT RPR REV VEH	359.47	
						24584	OUT RPR # 303	859.08	
31571	01/09/09	983.52	135	SANTA CRUZ AUTO PARTS, INC.		24529	REV VEH PARTS	59.82	
						24530	REV VEH PARTS	234.67	
						24537	SAFETY SUPPLIES	51.69	
						24538	PARTS & SUPPLIES	64.77	
						24539	PARTS & SUPPLIES	51.47	
						24540	PARTS & SUPPLIES	3.73	
						24541	SAFETY SUPPLIES	115.77	
						24550	PARTS & SUPPLIES	204.37	
						24551	PARTS & SUPPLIES	24.08	
						24571	REV VEH PARTS	29.39	
						24573	REV VEH PARTS	13.74	
						24574	CREDIT NOTE	-13.74	
						24575	PARTS & SUPPLIES	82.84	
						24640	REV VEH PARTS	41.40	
						24641	PARTS & SUPPLIES	19.52	
31572	01/09/09	9,832.71	079	SANTA CRUZ MUNICIPAL UTILITIES		24667	11/19-12/15 CEDAR	863.33	
						24687	11/20-12/16 PACIFIC	2,493.56	
						24688	11/19-12/15 120 GOLF	103.76	
						24689	11/19-12/15 RIVER	1,096.26	
						24690	11/19-12/15 DUBOIS	108.58	
						24691	11/19-12/15 RIVER	2,770.84	
						24692	11/19-12/15 VERNON	100.08	
						24693	11/19-12/15 GOLF	981.75	
						24694	11/19-12/15 ENCINAL	176.34	
						24695	11/19-12/15 DUBOIS	387.32	

5-1.4

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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 ALL CHECKS FOR ACCOUNTS PAYABLE

DATE: 01/01/09 THRU 01/31/09

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						24696	11/19-12/15 VERNON	396.58	
						24697	11/20-12/16 PACIFIC	92.32	
						24765	11/19-12/15 MB	261.99	
31573	01/09/09	337.93	002459	SCOTTS VALLEY WATER DISTRICT		24734	10/9-12/9 SVTC	337.93	
31574	01/09/09	8,195.97	002104	SELF-INSURANCE PLANS		24747	WORKERS COMP	8,195.97	
31575	01/09/09	746.85	002447	SETON IDENTIFICATION PRODUCTS		24668	NO SMOKING SIGNS	746.85	
31576	01/09/09	51.62	115	SNAP-ON INDUSTRIAL		24598	EMP TOOLS	51.62	
31577	01/09/09	1,334.73	001232	SPECIALIZED AUTO AND		24531	OUT RPR REV VEH	42.39	
						24532	OUT RPR REV VEH	192.74	
						24533	OUT RPR REV VEH	465.13	
						24572	OUT RPR REV VEH	192.74	
						24589	OUT RPR REV VEH	199.47	
						24590	OUT RPR REV VEH	242.26	
31578	01/09/09	100.00	B012	SPENCE, PAT	7	24756	DEC BOARD MTGS	100.00	
31579	01/09/09	97.76	001976	SPORTWORKS NORTHWEST, INC.		24595	REV VEH PARTS	97.76	
31580	01/09/09	83.55	104	STATE STEEL COMPANY	0	24633	PARTS & SUPPLIES	83.55	
31581	01/09/09	100.00	B017	STONE, MARK	7	24757	DEC BOARD MTGS	100.00	
31582	01/09/09	375.00	001165	THANH N. VU MD	7	24545	NOV MEDICAL EXAM	75.00	
						24603	MEDICAL EXAM	75.00	
						24604	MEDICAL EXAM	75.00	
						24605	MEDICAL EXAM	75.00	
						24606	MEDICAL EXAM	75.00	
31583	01/09/09	16.00	T176	TOLL, ALEXANDRA		24766	FAREBOX REFUND	16.00	
31584	01/09/09	917.50	001252	TOSHIBA BUSINESS SOLUTIONS		24739	OUT RPR EQUIP	458.75	
						24740	OUT RPR EQUIP	458.75	
31585	01/09/09	269.77	170	TOWNSEND'S AUTO PARTS		24721	REV VEH PARTS	198.12	
						24722	PARTS & SUPPLIES	71.65	
31586	01/09/09	165.00	582	TOYOTA OF SANTA CRUZ		24656	OUT RPR/PRIUS	165.00	
31587	01/09/09	128.59	007	UNITED PARCEL SERVICE		24549	FRT OUT/FLT	31.72	
						24583	FRT OUT/FLT	24.25	
						24657	FRT OUT/FLT	32.01	
						24701	FRT OUT/FLT	40.61	
31588	01/09/09	10.83	946	UNITED SITE SERVICES		24600	DEC FENCE RENT/DUB	10.83	
31589	01/09/09	10,119.97	002829	VALLEY POWER SYSTEMS, INC.		24582	REV VEH PARTS	116.77	
						24615	REV VEH PARTS	1,000.24	
						24626	TRANS REPAIR	8,878.94	
						24650	REV VEH PARTS	124.03	
						24705	CREDIT NOTE	-641.20	
						24706	REV VEH PARTS	641.19	
31590	01/09/09	154.49	434B	VERIZON CALIFORNIA		24671	2 PC CARDS/ADMIN	100.86	
						24674	MT BIEWLASKI	53.63	
31591	01/09/09	11,357.50	001043	VISION SERVICE PLAN		24661	JAN VISION INS	11,357.50	
31592	01/09/09	2,049.77	001223	WATSONVILLE CADILLAC, BUICK,		24535	OUT RPR REV VEH	1,740.89	
						24568	REV VEH PARTS	114.10	
						24569	REV VEH PARTS	194.78	
31593	01/09/09	66.19	436	WEST PAYMENT CENTER		24608	CA 09 CODE	66.19	
31594	01/09/09	97.84	002028	WESTCOAST LEGAL SERVICE	7	24519	PROF SVCS/RISK	97.84	
31595	01/09/09	5.64	186	WILSON, GEORGE H., INC.		24581	REPAIRS/MAINTENANCE	5.64	
31596	01/09/09	1,936.93	T173	YU NING HE & ELAINE WANG		24744	DEPOSIT LESS TAXES	1,936.93	
31597	01/09/09	54.30	147	ZEE MEDICAL SERVICE CO.		24686	SAFETY SUPPLIES	54.30	

5-1.5

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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31598M01/09/09		50.00	001374	SANTA CRUZ COUNTY SHERIFF		24769	BENCH WARRANT	50.00	MANUAL
31599M01/09/09		5,000.00	R539	BENCH WARRANT ROBERT MARIN & REPAIR FEE		24770	REPAIR FEE	5,000.00	MANUAL
31600M01/09/09		500.00	R540	ROBERT MARIN & ATTORNEYS FEES		24771	ATTORNEYS FEES	500.00	MANUAL
31601 01/16/09		143.77	002069	A TOOL SHED, INC.		24900	EQUIP RENTAL/GOLF	143.77	
31602 01/16/09		34.00	E157	ABREGO, EULALIO		24794	DMV FEES	34.00	
31603 01/16/09		1,425.96	001188	AFV FLEET SERVICE		24702	REV VEH PARTS	1,425.96	
31604 01/16/09		62.43	294	ANDY'S AUTO SUPPLY	0	24621	PARTS & SUPPLIES	7.80	
						24653	PARTS & SUPPLIES	54.63	
31605 01/16/09		409.50	876	ATCHISON, BARISONE, CONDOTTI &	7	24902	LEGAL SVCS/425 FRONT	409.50	
31606 01/16/09		774.00	011	BEWLEYS CLEANING	7	24683	DEC SVCS/RESEARCH	774.00	
31607 01/16/09		1,376.55	002189	BUS & EQUIPMENT		24808	REV VEH PARTS	986.76	
						24809	REV VEH PARTS	389.79	
31608 01/16/09		181.51	001471	CALIFORNIA CHAMBER OF COMMERCE		24901	09 CA EMP POSTERS	181.51	
31609 01/16/09		1,348.00	001249	CINDERELLA CARPET ONE		24853	INSTALL TILE/OPS	1,348.00	
31610 01/16/09		2,484.98	001346	CITY OF SANTA CRUZ		24878	PARKING DEF FEES	637.50	
						24879	PARKING DEF FEES	573.60	
						24923	COOP RETAIL MGMT	1,273.88	
31611 01/16/09		250.00	001113	CLARKE, SUSAN	7	24785	EXT BUS ANNOUN/AUDIT	75.00	
						24786	EXT BUS ANNOUN/AUDIT	50.00	
						24787	EXT BUS ANNOUN/AUDIT	125.00	
31612 01/16/09		32,615.40	001124	CLEAN ENERGY		24852	DEC LNG/FLT	14,730.83	
						24861	DEC LNG/FLT	8,247.75	
						24862	DEC LNG/FLT	9,636.82	
31613 01/16/09		28.51	002063	COSTCO		24776	PHOTO PROCESS/OPS	11.57	
						24777	PHOTO PROCESS/OPS	8.36	
						24778	PHOTO PROCESS/OPS	6.05	
						24779	PHOTO PROCESS/OPS	2.53	
31614 01/16/09		3,550.74	157	DELL MARKETING L.P.		24930	OFFICE EQUIP/IT	1,883.87	
						24931	OFFICE EQUIP/IT	1,666.87	
31615 01/16/09		1,723.01	001316	DEVCO OIL		24850	12/16-12/31 FUEL/FLT	1,723.01	
31616 01/16/09		629.69	085	DIXON & SON TIRE, INC.		24649	TIRES & TUBES	139.50	
						24807	TIRES & TUBES	490.19	
31617 01/16/09		61.00	002388	DOGHERRA'S	7	24654	TOW # 303	61.00	
31618 01/16/09		38.10	298	ERGOMETRICS		24742	SCORING SERVICES	38.10	
31619 01/16/09		898.33	117	GILLIG LLC		24724	REV VEH PARTS	898.33	
31620 01/16/09		21,495.00	002123	GIRO, INC.		24934	10/08-12/08 SUPPORT	195.00	
						24935	1/09-12/09 MAINT	21,300.00	
31621 01/16/09		1,050.52	001097	GREENWASTE RECOVERY, INC.		24910	DEC GARB/RESEARCH	210.52	
						24911	DEC GARB/GREEN VLY	17.50	
						24912	JAN-MAR/BIG BASIN	52.50	
						24913	JAN-MAR/LOMOND ST	52.50	
						24914	DEC/KINGS VLG	174.55	
						24915	JAN-MAR/SOQUEL	52.50	
						24916	JAN-MAR/SOQUEL	52.50	
						24917	DEC GARB/MT HERMON	70.45	
						24918	JAN-MAR FREEDOM	52.50	
						24919	JAN-MAR HWY 17	157.50	

5-1.6

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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						24920	JAN-MAR FREEDOM	105.00	
31622	01/16/09	520.70	215	IKON OFFICE SOLUTIONS		24921	JAN-MAR FREEDOM	52.50	
						24788	EQUIP SUPPLIES/OPS	84.63	
						24789	9/30-12/29 MAINT/OPS	436.07	
31623	01/16/09	4.97	1117	KELLEY'S SERVICE INC.		24638	REV VEH PARTS	4.97	
31624	01/16/09	1,596.00	878	KELLY SERVICES, INC.		24790	TEMP/OPS W/E 12/21	960.00	
						24791	TEMP/OPS W/E 12/28	636.00	
31625	01/16/09	794.86	001233	KIMBALL MIDWEST		24700	PARTS & SUPPLIES	794.86	
31626	01/16/09	49.00	001093	KROLL LABORATORY SPECIALISTS		24772	DEC DRUG TESTS	49.00	
31627	01/16/09	44.00	E516	KROVETZ, MARC		24793	DMV FEES	44.00	
31628	01/16/09	150.00	852	LAW OFFICES OF MARIE F. SANG	7	24774	WORKERS COMP CLAIM	75.00	
						24775	WORKERS COMP CLAIM	75.00	
31629	01/16/09	3,425.80	764	MERCURY METALS		24795	OUT RPR REV VEH	370.80	
						24796	OUT RPR REV VEH	552.50	
						24797	OUT RPR REV VEH	650.00	
						24798	OUT RPR REV VEH	552.50	
						24799	OUT RPR REV VEH	650.00	
						24800	OUT RPR REV VEH	650.00	
31630	01/16/09	647.13	041	MISSION UNIFORM		24617	UNIF/LAUNDRY/FLT	132.11	
						24618	UNIF/LAUNDRY/FLT	299.17	
						24619	UNIF/LAUNDRY/FLT	50.60	
						24620	UNIF/LAUNDRY/FLT	43.26	
						24677	UNIF/LAUNDRY/FAC	56.52	
						24802	UNIF/LAUNDRY/PT	35.42	
						24854	UNIF/LAUNDRY/FAC	30.05	
31631	01/16/09	14,534.31	001225	NATIONAL SECURITY SERVICE		24780	DEC SECURITY	5,476.00	
						24781	DEC SECURITY	3,404.00	
						24782	DEC SECURITY	1,813.00	
						24783	DEC SECURITY	1,628.00	
						24784	DEC SECURITY	2,213.31	
31632	01/16/09	7,561.95	002721	NEXTEL COMMUNICATIONS		24941	OCT PHONES	2,865.72	
						24942	NOV PHONES	2,349.70	
						24943	DEC PHONES	2,346.53	
31633	01/16/09	6,832.36	009	PACIFIC GAS & ELECTRIC		24885	11/22-1/5 KINGS VLG	2,336.46	
						24886	11/23-12/24 DUBOIS	4,495.90	
31634	01/16/09	26.98	043	PALACE ART & OFFICE SUPPLY		24864	OFFICE SUPPLY/MTC	26.98	
31635	01/16/09	1,333.50	002823	PAT PIRAS CONSULTING	7	24803	PROF SVCS	1,333.50	
31636	01/16/09	117.08	018	SALINAS VALLEY FORD SALES		24634	REV VEH PARTS	117.08	
31637	01/16/09	812.19	002713	SANTA CRUZ AUTO TECH, INC.		24811	OUT RPR REV VEH	52.91	
						24812	OUT RPR REV VEH	52.91	
						24813	OUT RPR REV VEH	49.71	
						24814	OUT RPR REV VEH	49.71	
						24815	OUT RPR REV VEH	49.71	
						24816	OUT RPR REV VEH	49.71	
						24817	OUT RPR REV VEH	59.20	
						24818	OUT RPR REV VEH	49.71	
						24819	OUT RPR REV VEH	59.20	
						24820	OUT RPR REV VEH	59.20	
						24821	OUT RPR REV VEH	59.20	
						24822	OUT RPR REV VEH	59.20	

5-1.7

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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						24823	OUT RPR REV VEH	59.20	
						24824	OUT RPR REV VEH	52.91	
						24825	OUT RPR REV VEH	49.71	
31638	01/16/09	10.57	135	SANTA CRUZ AUTO PARTS, INC.		24652	PARTS & SUPPLIES	10.57	
31639	01/16/09	165.00	001121	SILENT PARTNER SECURITY SYS.		24895	1/1-3/31 VERNON	165.00	
31640	01/16/09	2,183.43	001232	SPECIALIZED AUTO AND		24826	OUT RPR REV VEH	393.31	
						24827	OUT RPR REV VEH	302.49	
						24828	OUT RPR REV VEH	265.92	
						24829	OUT RPR REV VEH	161.08	
						24830	OUT RPR REV VEH	265.92	
						24831	OUT RPR REV VEH	171.85	
						24832	OUT RPR REV VEH	161.08	
						24833	OUT RPR REV VEH	269.04	
						24841	OUT RPR REV VEH	192.74	
31641	01/16/09	5.00	T177	STARKWEATHER, HAYLEY		24899	FARE BOX	5.00	
31642	01/16/09	7,144.48	001648	STEVE'S UNION SERVICE		24810	FUEL & LUBE/PT	7,144.48	
31643	01/16/09	2,707.41	002805	TELEPATH CORPORATION		24628	JAN MAINT/REPAIRS	2,707.41	
31644	01/16/09	12,122.39	057	U.S. BANK		24936	4246044555645971	5,284.95	
						24937	4246044555645971	836.58	
						24938	4246044555645971	307.50	
						24939	4246044555645971	749.00	
						24940	4246044555645971	4,944.36	
31645	01/16/09	39.12	007	UNITED PARCEL SERVICE		24887	FRT OUT/FLT	39.12	
31646	01/16/09	60,563.34	002829	VALLEY POWER SYSTEMS, INC.		24893	EN 143/ENG KIT	31,554.88	
						24894	EN 142/ENG KIT	29,008.46	
31647	01/16/09	238.17	001223	WATSONVILLE CADILLAC, BUICK.		24806	REV VEH PARTS	238.17	
31648	01/16/09	70.00	682	WEISS, AMY L.	7	24844	DEC INTERPRETER	70.00	
31649	01/16/09	127.81	147	ZEE MEDICAL SERVICE CO.		24858	SAFETY SUPPLIES	127.81	
31650	01/23/09	10.00	E157	ABREGO, EULALIO		24945	DMV FEES	10.00	
31651	01/23/09	346.16	020	ADT SECURITY SERVICES INC.		24898	FEB ALARMS	42.71	
						24903	FEB ALARMS	46.66	
						24904	FEB ALARMS	83.77	
						24905	FEB ALARMS	46.66	
						24906	FEB ALARMS	61.90	
						24907	FEB ALARMS	64.46	
31652	01/23/09	2,053.61	392	AIRTEC SERVICE		24880	DEC MAINT/REPAIRS	2,053.61	
31653	01/23/09	23.89	886	ALL PURE WATER	0	24975	OFFICE SUPPLIES	23.89	
31654	01/23/09	125.00	001062	ALLTERRA ENVIRONMENTAL INC.		24922	DEC INSPECTIONS	125.00	
31655	01/23/09	396.32	001	AT&T		25032	REPEATER/OPS	396.32	
31656	01/23/09	155.25	001047	BOBBY'S PIT STOP		24981	SMOG # 106	51.75	
						24982	SMOG # 110	51.75	
						24983	SMOG # 109	51.75	
31657	01/23/09	5,000.00	001365	BORTNICK, ROBERT S. & ASSOC.	7	24792	CALL STOP SURVEY	5,000.00	
31658	01/23/09	3,146.62	002627	CDW GOVERNMENT, INC.		24932	OFFICE SUPPLY/IT	2,875.36	
						24933	OFFICE SUPPLY/IT	271.26	
31659	01/23/09	11.16	172	CENTRAL WELDER'S SUPPLY, INC.		24972	DEC CYLINDER RENTAL	11.16	
31660	01/23/09	5,000.00	002346	CHANEY, CAROLYN & ASSOC., INC.		24736	JAN LEGISLATIVE SVCS	5,000.00	
31661	01/23/09	250.00	001113	CLARKE, SUSAN	7	25033	EXT BUS ANNOUN/AUDIT	125.00	
						25034	EXT BUS ANNOUN/AUDIT	125.00	
31662	01/23/09	1,914.31	909	CLASSIC GRAPHICS		24723	OUT RPR # 2204	1,914.31	

5-1.8

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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DATE: 01/01/09 THRU 01/31/09

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31663	01/23/09	8,068.84	001124	CLEAN ENERGY		24863	12/29 LNG/FLT	8,068.84	
31664	01/23/09	1,000.00	001084	CLUTCH COURIERS		24927	MAIL DELIVERY SVC	1,000.00	
31665	01/23/09	35,295.45	002569	COMERICA BANK		24773	WORK COMP FUND	35,295.45	
31666	01/23/09	184.00	367	COMMUNITY TELEVISION OF		24926	TV COVERAGE 12/19	184.00	
31667	01/23/09	750.00	001244	CSA AMERICA		23580	CERTIFICATION EXAM	375.00	
						23581	CERTIFICATION EXAM	375.00	
31668	01/23/09	188.96	001000	DAIMLER BUSES N. AMERICA INC.		24888	REV VEH PARTS	188.96	
31669	01/23/09	210.00	916	DOCTORS ON DUTY		25019	11/20 DRUG TEST	30.00	
						25020	11/20 DRUG TEST	5.00	
						25021	12/17 DRUG TEST	30.00	
						25022	12/17 DRUG TEST	5.00	
						25023	12/19 DRUG TEST	30.00	
						25024	12/19 DRUG TEST	35.00	
						25025	12/19 DRUG TEST	5.00	
						25026	12/30 DRUG TEST	30.00	
						25027	12/30 DRUG TEST	35.00	
						25028	12/30 DRUG TEST	5.00	
31670	01/23/09	55.00	002388	DOGHERRA'S	7	24859	TOW # 303	55.00	
31671	01/23/09	1,486.50	001492	EVERGREEN OIL INC.		24884	HAZ WASTE DISP	401.50	
						24891	HAZ WASTE DISP	105.00	
						24892	HAZ WASTE DISP	980.00	
31672	01/23/09	3,121.89	432	EXPRESS EMPLOYMENT PROS		25001	TEMP/FAC W/E 12/21	793.13	
						25002	TEMP/FAC W/E 12/28	793.13	
						25003	TEMP/FAC W/E 1/4	793.13	
						25004	TEMP/FAC W/E 1/11	742.50	
31673	01/23/09	162.32	372	FEDERAL EXPRESS		25046	SHIPPING	162.32	
31674	01/23/09	8,895.00	679	FIRST TRANSIT, INC.		24999	INSPECTION SVCS	8,895.00	
31675	01/23/09	41.04	510A	HASLER, INC.		25015	FEB EQUIPMENT RENTAL	41.04	
31676	01/23/09	30,000.00	002116	HINSHAW, EDWARD & BARBARA	7	25036	370 ENCINAL RENT	30,000.00	
31677	01/23/09	781.20	001209	IKON FINANCIAL SERVICES		24925	1/1-3/31 LEASE/OPS	781.20	
31678	01/23/09	651.13	215	IKON OFFICE SOLUTIONS		25014	OUT REPAIR-EQUIP	651.13	
31679	01/23/09	280.08	001163	INNERWORKINGS, INC		24984	PRINTING/FLT	280.08	
31680	01/23/09	18,272.38	002117	IULIANO	7	23545	08/09 PROP #2	404.96	
						23546	08/09 PROP TAX #2	2,559.22	
						25039	115 DUBOIS RENT	3,271.61	
						25040	111 DUBOIS RENT	12,036.59	
31681	01/23/09	2,820.54	110	JESSICA GROCERY STORE, INC.		25037	CUSTODIAL SERVICES	2,820.54	
31682	01/23/09	1,428.00	878	KELLY SERVICES, INC.		24950	TEMP/OPS W/E 1/4	744.00	
						25000	TEMP/FLT W/E 12/14	684.00	
31683	01/23/09	428.78	001233	KIMBALL MIDWEST		24890	PARTS & SUPPLIES	428.78	
						24896	PARTS & SUPPLIES	794.86	
						24897	CREDIT NOTE	-794.86	
31684	01/23/09	3,109.00	674	LIEBERT CASSIDY WHITMORE	7	25045	1/1-12/31 TRAINING	3,109.00	
31685	01/23/09	10.00	E410	LONA, SERGIO GONZALEZ		24944	DMV FEES	10.00	
31686	01/23/09	1,407.05	001119	MACERICH PARTNERSHIP LP	7	25035	CAPITOLA MALL RENT	1,407.05	
31687	01/23/09	511.72	041	MISSION UNIFORM		24704	UNIF/LAUNDRY/FAC	58.23	
						24715	UNIF/LAUNDRY/FLT	132.11	
						24716	UNIF/LAUNDRY/FLT	50.60	
						24717	UNIF/LAUNDRY/FLT	43.26	
						24718	UNIF/LAUNDRY/FLT	192.10	

5-1.9

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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DATE: 01/01/09 THRU 01/31/09

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31688	01/23/09	479.60	001454	MONTEREY BAY OFFICE PRODUCTS		24801	UNIF/LAUNDRY/PT	35.42	
						24847	EQUIP BASE CHARGES	150.00	
						24848	EQUIP BASE CHARGES	296.24	
						24849	EQUIP BASE CHARGES	33.36	
31689	01/23/09	13,657.00	001757	MOUNTAIN SERVICE COMPANY	7	25031	OUT RPR/SVC/WTC	13,657.00	
31690	01/23/09	1,667.07	002721	NEXTEL COMMUNICATIONS		25008	DEC PHONES /PT	1,667.07	
31691	01/23/09	887.00	950	PARADISE LANDSCAPE INC	0	24860	JAN MAINT	887.00	
31692	01/23/09	4,195.00	001136	PARVUS CORPORATION		25016	WIFI SERVICE	4,195.00	
31693	01/23/09	118.20	061A	REGISTER PAJARONIAN		24985	CLASS ADS/FINANCE	118.20	
31694	01/23/09	11,707.52	966	S.C. FUELS	0	24882	12/31 DIESEL/FLT	11,707.52	
31695	01/23/09	3,000.98	018	SALINAS VALLEY FORD SALES		24883	REV VEH PARTS	3,000.98	
31696	01/23/09	415.43	002713	SANTA CRUZ AUTO TECH, INC.		25005	OUT RPR # 303	415.43	
31697	01/23/09	83.64	135	SANTA CRUZ AUTO PARTS, INC.		24651	PARTS & SUPPLIES	44.98	
						24719	REV VEH PARTS	16.25	
						24720	OTH MOB SUPPLIES	22.41	
31698	01/23/09	841.22	002573	SANTA CRUZ COUNTY TAX COLLECTR		22827	07/08 BILL 08-1-30	841.22	
31699	01/23/09	5,602.98	977	SANTA CRUZ TRANSPORTATION, LLC	7	24805	DEC PT SVCS	5,602.98	
31700	01/23/09	50.00	B016	SKILLICORN, DALE	7	25017	JAN BOARD MTGS	50.00	
31701	01/23/09	12,116.23	001075	SOQUEL III ASSOCIATES	7	25038	RESEARCH PARK RENT	12,116.23	
31702	01/23/09	1,383.95	001232	SPECIALIZED AUTO AND		24834	OUT RPR REV VEH	265.92	
						24835	OUT RPR REV VEH	308.31	
						24836	OUT RPR REV VEH	161.08	
						24837	OUT RPR REV VEH	161.08	
						24838	OUT RPR REV VEH	161.08	
						24839	OUT RPR REV VEH	165.40	
						24840	OUT RPR REV VEH	161.08	
31703	01/23/09	789.12	080A	STATE BOARD OF EQUALIZATION		25030	OCT-DEC 08 FUEL TAX	789.12	
31704	01/23/09	93.46	080B	STATE BOARD OF EQUALIZATION		25018	08 UNDRD TANK MAINT	93.46	
31705	01/23/09	600.00	001165	THANH N. VU MD	7	24969	MEDICAL EXAM	75.00	
						24970	MEDICAL EXAM	75.00	
						24971	MEDICAL EXAM	75.00	
						25009	MEDICAL EXAM	75.00	
						25010	MEDICAL EXAM	75.00	
						25011	MEDICAL EXAM	75.00	
						25012	MEDICAL EXAM	75.00	
						25013	MEDICAL EXAM	75.00	
31706	01/23/09	543.87	083	THYSSENKRUPP ELEVATOR		24974	JAN-MAR MAINTENANCE	543.87	
31707	01/23/09	26.55	007	UNITED PARCEL SERVICE		24998	FRT OUT/FLT	26.55	
31708	01/23/09	1,229.67	002829	VALLEY POWER SYSTEMS, INC.		24624	REV VEH PARTS	24.74	
						24703	REV VEH PARTS	1,204.93	
31709	01/23/09	7,296.22	001083	WATSONVILLE TRANSPORTATION, INC		24804	DEC PT SVCS	7,296.22	
31710	01/23/09	395.67	042	WFCB-OSH COMMERCIAL SERVICES		25041	1217 RIVER REPAIRS	234.38	
						25042	EMP TOOL REPLACEMENT	-71.34	
						25043	EMP TOOL REPLACEMENT	71.34	
						25044	EMP TOOL REPLACEMENT	161.29	
31711	01/23/09	118.10	147	ZEE MEDICAL SERVICE CO.		24973	SAFETY SUPPLIES	51.97	
						25007	SAFETY SUPPLIES	66.13	
31712M01	22/09	105.00	002880	CITY OF SANTA CRUZ 138 GOLF/APP FEE		25047	138 GOLF/APP FEE	105.00	MANUAL
31713	01/30/09	475.04	001263	ABBOTT STREET RADIATOR, INC.		24976	OUT RPR # 9811	475.04	

5-1.10

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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31714	01/30/09	10.55	294	ANDY'S AUTO SUPPLY	0	24865	PARTS & SUPPLIES	10.55	
31715	01/30/09	1,045.97	001	AT&T		25131	JAN REPEATERS/OPS	85.08	
						25206	JAN PHONES/138 GOLF	960.89	
31716	01/30/09	56.06	M033	BAILEY, NEIL	0	25241	MED PYMT SUPP	56.06	
31717	01/30/09	1,875.51	001856	BAY COMMUNICATIONS	7	25275	PHONES/138 GOLF	143.27	
						25276	PHONES/138 GOLF CLB	226.84	
						25277	PHONES/138 GOLF	1,505.40	
31718	01/30/09	59.68	001112	BRINKS AWARDS & SIGNS	7	24845	PLATES/PLAQUES/ADM	59.68	
31719	01/30/09	100.00	B018	BUSTICHI, DENE	7	25138	JAN BOARD MTGS	100.00	
31720	01/30/09	461,500.63	502	CA PUBLIC EMPLOYEES'		25079	FEB MED INS	461,500.63	
31721	01/30/09	34.00	E023	CALDERON, FRANCISCO		25159	DMV FEES	34.00	
31722	01/30/09	56.06	M022	CAPELLA, KATHLEEN	0	25256	MED PYMT SUPP	56.06	
31723	01/30/09	1,955.01	002627	CDW GOVERNMENT, INC.		25148	COMPUTER SUPPLY/IT	1,057.88	
						25149	COMPUTER SUPPLY/IT	897.13	
31724	01/30/09	28.03	M073	CENTER, DOUG	0	25264	MED PYMT SUPP	28.03	
31725	01/30/09	430.00	002479	CENTRAL EQUIPMENT SERVICE CO.		25075	DEC SVC/DUBOIS LIFT	430.00	
31726	01/30/09	28.03	M036	CERVANTES, GLORIA	0	25242	MED PYMT SUPP	28.03	
31727	01/30/09	5,000.00	002346	CHANEY, CAROLYN & ASSOC., INC.		25184	FEB LEGISLATIVE SVC	5,000.00	
31728	01/30/09	59.91	001346	CITY OF SANTA CRUZ		25293	NOV LANDFILL/MB	26.78	
						25295	DEC LANDFILL/RIVER	33.13	
31729	01/30/09	5,569.75	667	CITY OF SCOTTS VALLEY		23812	WASTEWATER	1,958.44	
						23813	BLUEBONNET LANE	3,611.31	
31730	01/30/09	10.63	130	CITY OF WATSONVILLE UTILITIES		25127	12/1-1/1 WTC	10.63	
31731	01/30/09	50.00	B014	CITY OF WATSONVILLE		25147	JAN BOARD MTGS	50.00	
31732	01/30/09	1,986.89	909	CLASSIC GRAPHICS		24977	OUT RPR #8101	1,986.89	
31733	01/30/09	39,151.17	001124	CLEAN ENERGY		25214	JAN LNG /FLT	39,151.17	
31734	01/30/09	42.73	075	COAST PAPER & SUPPLY INC.		25071	CLEANING SUPPLIES	42.73	
31735	01/30/09	31.20	002063	COSTCO		24846	LOCAL MTG EXP	12.67	
						24956	PHOTO PROCESS/OPS	6.00	
						24957	PHOTO PROCESS/OPS	6.70	
						24958	PHOTO PROCESS/OPS	5.83	
31736	01/30/09	28.03	M092	CRAWFORD, TERRI	0	25265	MED PYMT SUPP	28.03	
31737	01/30/09	1,066.98	001048	CRUZ CAR WASH		25054	DEC VEH WASH/PT	1,066.98	
31738	01/30/09	28.03	M039	DAVILA, ANA MARIA	0	25243	MED PYMT SUPP	28.03	
31739	01/30/09	1,473.97	480	DIESEL MARINE ELECTRIC, INC.		24881	REV VEH PARTS	1,473.97	
31740	01/30/09	437.52	085	DIXON & SON TIRE, INC.		25052	TIRES & TUBES	437.52	
31741	01/30/09	28.03	M096	DRAKE, JUDITH	0	25266	MED PYMT SUPP	28.03	
31742	01/30/09	500.00	002862	ECOLOGICAL CONCERNS INC.		25186	WATER DRAINAGE/MB	500.00	
31743	01/30/09	9,744.15	001246	ENHANCE NETWORK COMMUNICATION		24929	CONSULTING SVCS	9,744.15	
31744	01/30/09	4,005.20	R542	FERNANDEZ, JUAN MANUEL		25158	SETTLEMENT/RISK	4,005.20	
31745	01/30/09	28.03	M099	FIKE, LOUIS	0	25267	MED PYMT SUPP	28.03	
31746	01/30/09	75.00	002295	FIRST ALARM		25055	PROF/TECH SVCS/PT	75.00	
31747	01/30/09	67.46	M074	GABRIELE, BERNARD	0	25268	MED PYMT SUPP	67.46	
31748	01/30/09	28.03	M040	GARBEZ, LINDA	0	25244	MED PYMT SUPP	28.03	
31749	01/30/09	56.06	M100	GARCIA, SANTIAGO	0	25245	MED PYMT SUPP	56.06	
31750	01/30/09	28.03	M101	GOES, ALAN	0	25269	MED PYMT SUPP	28.03	
31751	01/30/09	56.06	M041	GOUVEIA, ROBERT	0	25246	MED PYMT SUPP	56.06	
31752	01/30/09	100.00	B023	GRAVES, RON		25139	JAN BOARD MTGS	100.00	
31753	01/30/09	100.00	B021	HAGEN, DONALD N.	7	25140	JAN BOARD MTGS	100.00	
31754	01/30/09	72.94	M081	HALL, JAMES	0	25247	MED PYMT SUPP	72.94	

5-1.11

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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31755	01/30/09	60,024.80	001035	HARRIS & ASSOCIATES		25193	REIMBURSE EXP-12/31	37.30	
						25194	PROF SVCS THRU 12/31	59,987.50	
31756	01/30/09	3,495.77	001745	HARTFORD LIFE AND ACCIDENT INS		25182	FEB LIFE/AD&D INS	3,495.77	
31757	01/30/09	48.83	510A	HASLER, INC.		25188	2/1-2/28 RENTAL/ADM	48.83	
31758	01/30/09	50.00	B006	HINKLE, MICHELLE	7	25141	JAN BOARD MTGS	50.00	
31759	01/30/09	363.87	166	HOSE SHOP, THE		24855	CREDIT NOTE	-292.35	
						24995	REPAIRS/MAINTENANCE	18.24	
						25029	PARTS & SUPPLIES	637.98	
31760	01/30/09	28.03	M069	JACOBS, KENNETH	0	25257	MED PYMT SUPP	28.03	
31761	01/30/09	2,200.00	001261	JC HEATING &		25278	WALL FURNACE/MB	2,200.00	
31762	01/30/09	28.03	M104	JUSSEL, PETE	0	25270	MED PYMT SUPP	28.03	
31763	01/30/09	246.99	M061	KAMEDA, TERRY	0	25258	MED PYMT SUPP	246.99	
31764	01/30/09	40.64	1117	KELLEY'S SERVICE INC.		24873	REV VEH PARTS	40.64	
31765	01/30/09	768.00	878	KELLY SERVICES, INC.		25160	TEMP/OPS W/E 1/11	768.00	
31766	01/30/09	72.98	036	KELLY-MOORE PAINT CO., INC.		25292	REP/MAINT/1217 RIVER	72.98	
31767	01/30/09	426.28	001233	KIMBALL MIDWEST		24993	PARTS & SUPPLIES	449.93	
						25064	PARTS & SUPPLIES	14.76	
						25065	CREDIT MEMO	-38.41	
31768	01/30/09	79.66	039	KINKO'S INC.		24924	WIFI ON HWY 17 CARDS	79.66	
31769	01/30/09	245.99	E635	KINSLOW, DEBBIE		25237	12/3-12/7 EMP TRAVEL	245.99	
31770	01/30/09	30.00	880	LEXISNEXIS		25076	PROF/TECH SVC/RISK	30.00	
31771	01/30/09	650.00	764	MERCURY METALS		25053	OUT RPR REV VEH	650.00	
31772	01/30/09	520.16	041	MISSION UNIFORM		24866	UNIF/LAUNDRY/FLT	132.11	
						24867	UNIF/LAUNDRY/FLT	43.26	
						24868	UNIF/LAUNDRY/FLT	237.67	
						24869	UNIF/LAUNDRY/FLT	50.60	
						24870	UNIF/LAUNDRY/FAC	56.52	
31773	01/30/09	15,952.37	001225	NATIONAL SECURITY SERVICE		24951	DEC SECURITY	6,223.40	
						24952	DEC SECURITY	3,256.00	
						24953	DEC SECURITY	1,998.00	
						24954	DEC SECURITY	1,628.00	
						24955	DEC SECURITY	2,846.97	
31774	01/30/09	22.05	004	NORTH BAY FORD LINC-MERCURY		24909	REV VEH PARTS	9.57	
						25051	REV VEH PARTS	12.48	
31775	01/30/09	28.03	M050	O'MARA, KATHLEEN	0	25248	MED PYMT SUPP	28.03	
31776	01/30/09	1,150.49	009	PACIFIC GAS & ELECTRIC		24997	12/10-1/5 RESEARCH	1,150.49	
31777	01/30/09	170.69	043	PALACE ART & OFFICE SUPPLY		24928	OFFICE SUPPLY/OPS	170.69	
31778	01/30/09	217.29	M057	PARHAM, WALLACE	0	25259	MED PYMT SUPP	217.29	
31779	01/30/09	28.03	M109	PEREZ, CHERYL		25249	MED PYMT SUPP	28.03	
31780	01/30/09	109.00	E333	PEREZ, JAIME		25137	DMV FEES/MEDICAL	109.00	
31781	01/30/09	180.17	M064	PETERS, TERRIE	0	25260	MED PYMT SUPP	180.17	
31782	01/30/09	28.03	M070	PICARELLA, FRANCIS	0	25261	MED PYMT SUPP	28.03	
31783	01/30/09	424.00	481	PIED PIPER EXTERMINATORS, INC.		24876	JAN PEST CONTROL	241.00	
						24877	JAN PEST CONTROL	183.00	
31784	01/30/09	100.00	B024	PIRIE, ELLEN	7	25142	JAN BOARD MTGS	100.00	
31785	01/30/09	28.03	M117	POLANCO, ANDRES		25271	MED PYMT SUPP	28.03	
31786	01/30/09	217.29	M058	POTEETE, BEVERLY	0	25262	MED PYMT SUPP	217.29	
31787	01/30/09	676.00	001149	PREFERRED PLUMBING, INC.		25213	SVC/CAFE LENA	676.00	
31788	01/30/09	812.16	107A	PROBUILD		24874	REPAIRS/MAINTENANCE	14.65	
						24875	REPAIRS/MAINTENANCE	16.34	

5-1.12

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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						24978	PARTS & SUPPLIES	80.12	
						25279	REP/MAINT/138 GOLF	66.17	
						25280	REP/MAINT/138 GOLF	13.65	
						25281	REP/MAINT/ 138 GOLF	16.85	
						25282	REP/MAINT/138 GOLF	11.71	
						25283	REP/MAINT/1217 RIVER	34.09	
						25284	REP/MAINT 1217 RIVER	20.68	
						25285	REP/MAINT/1217 RIVER	111.83	
						25286	REP/MAINT/1217 RIVER	204.45	
						25287	REP/MAINT/1217 RIVER	106.19	
						25288	REP/MAINT/1217 RIVER	28.57	
						25289	REP/MAINT/1217 RIVER	18.66	
						25290	REP/MAINT/1217 RIVER	42.56	
						25291	REP/MAINT/1217 RIVER	25.64	
31789	01/30/09	359.53	061	REGISTER PAJARONIAN		24851	1/8 PUB NOTICE/ADM	359.53	
31790	01/30/09	100.00	B022	ROBINSON, LYNN MARIE		25143	JAN BOARD MTGS	100.00	
31791	01/30/09	218.96	M005	ROSS, EMERY	0	25255	MED PYMT SUPP	218.96	
31792	01/30/09	56.06	M085	ROSSI, DENISE	0	25250	MED PYMT SUPP	56.06	
31793	01/30/09	50.00	B015	ROTKIN, MIKE	7	25144	JAN BOARD MTGS	50.00	
31794	01/30/09	28.03	M030	ROWE, RUBY		25251	MED PYMT SUPP	28.03	
31795	01/30/09	13,560.36	966	S.C. FUELS	0	25067	JAN DIESEL/FLT	13,560.36	
31796	01/30/09	1,087.21	002713	SANTA CRUZ AUTO TECH. INC.		24996	OUT RPR # 602	901.03	
						25006	OUT RPR # 503	186.18	
31797	01/30/09	194.79	135	SANTA CRUZ AUTO PARTS, INC.		24871	PARTS & SUPPLIES	8.02	
						24872	SAFETY SUPPLIES	98.91	
						25048	REV VEH PARTS	27.49	
						25049	REV VEH PARTS	60.37	
31798	01/30/09	9,649.17	079	SANTA CRUZ MUNICIPAL UTILITIES		25219	12/16-1/16 ENCINAL	183.13	
						25220	12/16-1/16 DUBOIS	387.32	
						25221	12/16-1/16 120 GOLF	141.48	
						25222	12/16-1/16 DUBOIS	122.14	
						25223	12/16-1/16 RIVER	992.14	
						25224	12/16-1/16 138 GOLF	937.58	
						25225	12/16-1/16 VERNON	108.46	
						25226	12/16-1/16 VERNON	389.80	
						25227	12/16-1/16 RIVER	2,802.39	
						25228	12/17-1/16 PACIFIC	2,635.24	
						25229	12/17-1/16 PACIFIC	86.16	
						25230	12/16-1/16 CEDAR/WNT	863.33	
31799	01/30/09	384.50	149	SANTA CRUZ SENTINEL	0	25168	PUB NOTICE FIN 12/10	193.74	
						25169	PUB NOTICE FIN 12/31	190.76	
31800	01/30/09	76.84	122	SCMTD PETTY CASH - OPS		25274	PETTY CASH/OPS	76.84	
31801	01/30/09	246.00	957	SECURITY SHORING & STEEL PLT		24908	11/28-12/27 RENTAL	246.00	
31802	01/30/09	156.17	M010	SHORT, SLOAN	0	25263	MED PYMT SUPP	156.17	
31803	01/30/09	28.03	M112	SILVA, EDUARDO	0	25272	MED PYMT SUPP	28.03	
31804	01/30/09	56.06	M054	SLOAN, FRANCIS	0	25252	MED PYMT SUPP	56.06	
31805	01/30/09	1,275.14	001232	SPECIALIZED AUTO AND		24842	OUT RPR REV VEH	161.08	
						24843	OUT RPR REV VEH	127.17	
						25058	OUT RPR REV VEH	197.06	
						25059	OUT RPR REV VEH	127.17	

5-1.13

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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 ALL CHECKS FOR ACCOUNTS PAYABLE

DATE: 01/01/09 THRU 01/31/09

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
						25060	OUT RPR REV VEH	252.21	
						25061	OUT RPR REV VEH	410.45	
31806	01/30/09	100.00	B012	SPENCE, PAT	7	25145	JAN BOARD MTGS	100.00	
31807	01/30/09	1,809.00	080	STATE BOARD OF EQUALIZATION		25238	OCT-DEC USE TAX	1,809.00	
31808	01/30/09	519.90	002871	STATE ELECTRIC GENERATOR		25216	RESEARCH PARK/SVC	519.90	
31809	01/30/09	100.00	B017	STONE, MARK	7	25146	JAN BOARD MTGS	100.00	
31810	01/30/09	315.33	017	SUN MICROSYSTEMS, INC.		25150	SOFT/HARDWARE/IT	315.33	
31811	01/30/09	1,302.96	001165	THANH N. VU MD	7	24959	MEDICAL EXAM	75.00	
						24960	MEDICAL EXAM	75.00	
						24961	MEDICAL EXAM	75.00	
						24962	MEDICAL EXAM	75.00	
						24963	MEDICAL EXAM	75.00	
						24964	MEDICAL EXAM	75.00	
						24965	MEDICAL EXAM	75.00	
						24966	MEDICAL EXAM	75.00	
						24967	MEDICAL EXAM	75.00	
						24968	MEDICAL EXAM	75.00	
						25112	MEDICAL EXAM	92.16	
						25113	MEDICAL EXAM	92.16	
						25114	MEDICAL EXAM	92.16	
						25115	MEDICAL EXAM	92.16	
						25116	MEDICAL EXAM	92.16	
						25117	MEDICAL EXAM	92.16	
31812	01/30/09	91,279.90	970	THE MECHANICS BANK		25235	SEPT RETAINAGE/MB	91,279.90	
31813	01/30/09	28.03	M086	TOLINE, DONALD	0	25253	MED PYMT SUPP	28.03	
31814	01/30/09	32.35	007	UNITED PARCEL SERVICE		25123	FRT OUT/FLT	32.35	
31815	01/30/09	10.83	946	UNITED SITE SERVICES		25161	JAN FENCE RENT/DUB	10.83	
31816	01/30/09	2,000.00	002873	USPS-HASLER		25294	POSTAGE FOR METER	2,000.00	
31817	01/30/09	503.31	002829	VALLEY POWER SYSTEMS, INC.		24889	REV VEH PARTS	503.31	
31819	01/30/09	155.03	001251	VERIZON BUSINESS SERVICES, INC.		25080	NOV PHONES	0.16	
						25081	NOV PHONES	0.72	
						25082	NOV PHONES	15.40	
						25083	NOV PHONES	4.73	
						25084	NOV PHONES	1.72	
						25085	NOV PHONES	1.33	
						25086	NOV PHONES	1.27	
						25087	NOV PHONES	0.60	
						25088	NOV PHONES	0.14	
						25089	NOV PHONES	0.37	
						25090	NOV PHONES	0.09	
						25091	NOV PHONES	0.07	
						25092	NOV PHONES	7.30	
						25093	NOV PHONES	38.69	
						25094	NOV PHONES	1.79	
						25095	NOV PHONES	16.80	
						25096	NOV PHONES	0.36	
						25097	DEC PHONES	0.82	
						25098	DEC PHONES	2.94	
						25099	DEC PHONES	0.32	
						25100	DEC PHONES	7.80	

5-1.14

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
 CHECK JOURNAL DETAIL BY CHECK NUMBER  
 ALL CHECKS FOR ACCOUNTS PAYABLE

DATE: 01/01/09 THRU 01/31/09

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
						25101	DEC PHONES	0.50	
						25102	DEC PHONES	0.81	
						25103	DEC PHONES	6.58	
						25104	DEC PHONES	0.45	
						25105	DEC PHONES	25.44	
						25106	DEC PHONES	1.11	
						25107	DEC PHONES	6.05	
						25108	DEC PHONES	0.24	
						25109	DEC PHONES	7.06	
						25110	DEC PHONES	2.89	
						25111	DEC PHONES	0.48	
31820	01/30/09	154.90	434B	VERIZON CALIFORNIA		25130	PC CARDS/ADMIN	100.82	
						25215	MT BIEWLASKI	54.08	
31821	01/30/09	11,412.50	001043	VISION SERVICE PLAN		25197	FEB VISION INS	11,412.50	
31822	01/30/09	217.29	M076	VONWAL, YVETTE	0	25273	MED PYMT SUPP	217.29	
31823	01/30/09	130,977.37	001239	WALD, RUHNKE & DOST ARCHITECTS		25189	A&E SVCS/VERNON	68,762.92	
						25190	A&E SVCS/VERNON	62,214.45	
31824	01/30/09	1,611.55	001223	WATSONVILLE CADILLAC, BUICK,		25050	REV VEH PARTS	1,285.84	
						25057	REV VEH PARTS	325.71	
31825	01/30/09	799,159.83	002887	WEST BAY BUILDERS, INC.		25234	CONST SVC MB 9/30	799,159.83	
31826	01/30/09	279.17	436	WEST PAYMENT CENTER		25078	DEC ACCESS CHARGE	279.17	
31827	01/30/09	18.79	186	WILSON, GEORGE H., INC.		25069	REPAIRS/MAINTENANCE	8.18	
						25070	REPAIRS/MAINTENANCE	10.61	
31828	01/30/09	28.03	M088	YAGI, RANDY	0	25254	MED PYMT SUPP	28.03	
31829	01/30/09	9,999.00	001255	WILLIAMS TREE SERVICE		25183	TREE REMOVAL/GOLF	9,999.00	
TOTAL		2,857,181.01		ACCOUNTS PAYABLE			TOTAL CHECKS	354	2,857,181.01

5-1.15

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009  
**TO:** Board of Directors  
**FROM:** Angela Aitken, Finance Manager   
**SUBJECT:** MONTHLY BUDGET STATUS REPORTS FOR DECEMBER 2008.

## I. RECOMMENDED ACTION

**That the Board of Directors accept and file the budget status reports for the month of December 2008.**

## II. SUMMARY OF ISSUES

- **Operating Revenues** for the month of December 2008 were \$80K or 1 % over the amount of revenue expected for December 2008.
- **Consolidated Operating Expenses** for the month of December 2008 were \$668K or 20 % under budget.
- **Capital Budget** spending year to date through December 2008 was \$9,349K or 27 % of the Capital budget.
- **The adopted revised FY09 & FY10 Budget** numbers will be reflected in the January's report.

## III. DISCUSSION

An analysis of the District's budget status is prepared monthly in order to apprise the Board of Directors of the District's actual revenues, expenses and capital in relation to the adopted operating and capital budgets for the fiscal year. The attached monthly revenue, expense and capital reports represent the status of the District's FY09 operating and capital budgets versus actual expenditures for the month.

The adopted revised FY09 & FY10 Budget numbers will be reflected in the January's report.

The fiscal year has elapsed **50%**.

5-2.1

**A. Operating Revenue**

For the month of December 2008 revenue was \$80K or 1 % over the amount of revenue expected for the month. Revenue variances are explained in the notes at the end of the revenue report.

**B. Operating Expense by Department**

Total Operating Expenses by Department for the month of December 2008 were \$668K or 20 % under budget; 3 % over where we were in FY08. Majority of the variance is due to lower than anticipated Personnel expenses in Bus Operators and Paratransit Program, Repair-Equipment costs in Facilities, and Fuel & Lube Rev Vehicles and Rev Vehicle Parts expenses in Fleet.

**C. Consolidated Operating Expenses**

Consolidated Operating Expenses for the month of December 2008 were \$668K or 20 % under budget. Personnel Expenses, Repair-Equipment, Rev Vehicle Parts and Fuels & Lube Rev Veh all contributed to the variance. Further explanation of these accounts is contained in the notes following the report.

**D. Capital Budget**

Capital Budget spending year to date through December 2008 was \$9,349K or 27 % of the Capital budget. Of this, \$1,725K has been spent of the MetroBase Maintenance Facility project, \$3,567K has been spent on the Local Bus Replacement , \$1,383K has been spent on the CNG Bus Conversions, and \$2,359K has been spent on the H17 Bus Replacement project.

**IV. FINANCIAL CONSIDERATIONS**

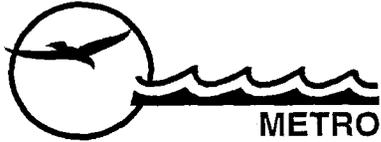
At this time, our Operating and Capital Budget are within tolerable variances.

**IV. ATTACHMENTS**

**Attachment A:** FY09 Operating Revenue for the month ending – 12/31/08  
FY09 Operating Expenses by Department for the month ending – 12/31/08  
FY09 Consolidated Operating Expenses for the month ending – 12/31/08  
FY09 Capital Budget Reports for the month ending – 12/31/08

Prepared by: Kristina Mihaylova

5-2.2



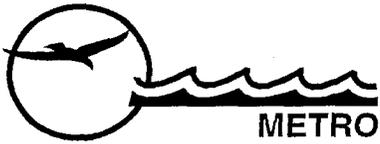
**FY09**  
**Operating Revenue**  
 For the month ending - December 31, 2008

Percent of Year Elapsed - 50%

Revenue Source	Current Period				Notes	Year to Date				YTD Year Over Year Comparison			
	Actual	Budget	\$ Var	% Var		Actual	Budget	\$ Var	% Var	FY09 Actual	FY08 Actual	\$ Var	% Var
Passenger Fares	\$ 265,766	\$ 251,495	\$ 14,271	6%		\$ 1,746,491	\$ 1,733,299	\$ 13,192	1%	\$ 1,746,491	\$ 1,767,936	\$ (21,445)	-1%
Paratransit Fares	\$ 38,749	\$ 18,013	\$ 20,736	115%		\$ 197,701	\$ 125,531	\$ 72,170	57%	\$ 197,701	\$ 114,753	\$ 82,948	72%
Special Transit Fares	\$ 191,479	\$ 137,632	\$ 53,847	39%		\$ 1,456,821	\$ 1,240,033	\$ 216,788	17%	\$ 1,456,821	\$ 1,078,915	\$ 377,906	35%
Highway 17 Fares	\$ 83,030	\$ 58,245	\$ 24,785	43%		\$ 528,237	\$ 406,853	\$ 121,384	30%	\$ 528,237	\$ 404,866	\$ 123,371	30%
Highway 17 Payments	\$ 33,592	\$ 57,920	\$ (24,328)	-42%		\$ 213,530	\$ 279,419	\$ (65,889)	-24%	\$ 213,530	\$ 239,727	\$ (26,197)	-11%
<b>Subtotal Passenger Revenue</b>	<b>\$ 612,616</b>	<b>\$ 523,305</b>	<b>\$ 89,311</b>	<b>17%</b>	<b>1</b>	<b>\$ 4,142,780</b>	<b>\$ 3,785,135</b>	<b>\$ 357,645</b>	<b>9%</b>	<b>\$ 4,142,780</b>	<b>\$ 3,606,197</b>	<b>\$ 536,583</b>	<b>15%</b>
Commissions	\$ 28	\$ 457	\$ (429)	-94%		\$ 3,213	\$ 2,741	\$ 472	17%	\$ 3,213	\$ 2,687	\$ 526	20%
Advertising Income	\$ 8,523	\$ 7,700	\$ 823	11%		\$ 68,158	\$ 46,200	\$ 21,958	48%	\$ 68,158	\$ 150,461	\$ (82,303)	-55%
Rent Income - SC Pacific Station	\$ 7,512	\$ 6,919	\$ 593	9%		\$ 44,866	\$ 41,514	\$ 3,352	8%	\$ 44,866	\$ 38,398	\$ 6,468	17%
Rent Income - Watsonville TC	\$ 2,852	\$ 3,851	\$ (999)	-26%		\$ 19,889	\$ 23,106	\$ (3,217)	-15%	\$ 19,889	\$ 19,999	\$ (410)	-2%
Rent Income - General	\$ 795	\$ -	\$ 795	100%		\$ 12,659	\$ -	\$ 12,659	100%	\$ 12,659	\$ -	\$ 12,659	100%
Interest Income	\$ 34,496	\$ 26,917	\$ 7,579	28%	2	\$ 239,557	\$ 165,564	\$ 73,993	45%	\$ 239,557	\$ 550,911	\$ (311,354)	-57%
Other Non-Transp Revenue	\$ 2,918	\$ 33,000	\$ (30,082)	-91%	3	\$ 4,527	\$ 66,000	\$ (61,473)	-93%	\$ 4,527	\$ 69,174	\$ (64,647)	-93%
Sales Tax Revenue	\$ 1,479,191	\$ 1,466,488	\$ 12,703	1%	4	\$ 8,667,996	\$ 8,988,951	\$ (320,955)	-4%	\$ 8,667,996	\$ 8,853,557	\$ (185,561)	-2%
Transp Dev Act (TDA) - Op Asst	\$ 1,494,616	\$ 1,494,616	\$ -	0%		\$ 2,989,232	\$ 2,989,232	\$ -	0%	\$ 2,989,232	\$ 3,181,018	\$ (191,786)	-6%
<b>Subtotal Other Revenue</b>	<b>\$ 3,030,931</b>	<b>\$ 3,039,948</b>	<b>\$ (9,017)</b>	<b>0%</b>		<b>\$ 12,049,817</b>	<b>\$ 12,323,308</b>	<b>\$ (273,491)</b>	<b>-2%</b>	<b>\$ 12,049,817</b>	<b>\$ 12,866,205</b>	<b>\$ (816,388)</b>	<b>-6%</b>
FTA Sec 5307 - Op Asst	\$ 3,426,293	\$ 3,426,293	\$ -	0%		\$ 3,426,293	\$ 3,426,293	\$ -	0%	\$ 3,426,293	\$ 3,153,552	\$ 272,741	9%
Repay FTA Advance	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
FTA Sec 5311 - Rural Op Asst	\$ -	\$ -	\$ -	0%		\$ 161,615	\$ 161,615	\$ -	0%	\$ 161,615	\$ 149,335	\$ 12,280	8%
Sec 5303 - AMBAG Funding	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ (3,169)	\$ 3,169	-100%
FTA Sec 5317 - Op Assistance	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
<b>Subtotal Grant Revenue</b>	<b>\$ 3,426,293</b>	<b>\$ 3,426,293</b>	<b>\$ -</b>	<b>0%</b>		<b>\$ 3,587,908</b>	<b>\$ 3,587,908</b>	<b>\$ -</b>	<b>0%</b>	<b>\$ 3,587,908</b>	<b>\$ 3,299,718</b>	<b>\$ 288,190</b>	<b>9%</b>
<b>Subtotal Operating Revenue</b>	<b>\$ 7,069,840</b>	<b>\$ 6,989,546</b>	<b>\$ 80,294</b>	<b>1%</b>		<b>\$ 19,780,505</b>	<b>\$ 19,696,351</b>	<b>\$ 84,154</b>	<b>0%</b>	<b>\$ 19,780,505</b>	<b>\$ 19,772,120</b>	<b>\$ 8,385</b>	<b>0%</b>
<b>Total Operating Expenses</b>	<b>\$ 2,628,653</b>					<b>\$ 17,193,340</b>				<b>\$ 17,193,340</b>	<b>\$ 16,617,648</b>		
<b>Variance</b>	<b>\$ 4,441,187</b>					<b>\$ 2,587,165</b>				<b>\$ 2,587,165</b>	<b>\$ 3,154,472</b>		
<b>One-Time Revenue</b>													
Transfer (to)/from Capital Reserves	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
Transfer (to)/from Cash Flow Res	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
Transfer (to)/from W/C Reserve	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
Transfer (to)/from Liab Ins Res	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
Carryover from Previous Year	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
<b>Subtotal One-Time Revenue</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>		<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>0%</b>
<b>Total Revenue</b>	<b>\$ 7,069,840</b>	<b>\$ 6,989,546</b>	<b>\$ 80,294</b>	<b>1%</b>		<b>\$ 19,780,505</b>	<b>\$ 19,696,351</b>	<b>\$ 84,154</b>	<b>0%</b>	<b>\$ 19,780,505</b>	<b>\$ 19,772,120</b>	<b>\$ 8,385</b>	<b>0%</b>
<b>Total Operating Expenses</b>	<b>\$ 2,628,653</b>					<b>\$ 17,193,340</b>				<b>\$ 17,193,340</b>	<b>\$ 16,617,648</b>		
<b>Variance</b>	<b>\$ 4,441,187</b>					<b>\$ 2,587,165</b>				<b>\$ 2,587,165</b>	<b>\$ 3,154,472</b>		

5-2.a1

Attachment A



**FY09**  
**Operating Revenue**  
*For the month ending - December 31, 2008*

Percent of Year Elapsed - 50%

<u>Revenue Source</u>	<u>Current Period</u>					<u>Year to Date</u>				<u>YTD Year Over Year Comparison</u>			
	<u>Actual</u>	<u>Budget</u>	<u>\$ Var</u>	<u>% Var</u>	<u>Notes</u>	<u>Actual</u>	<u>Budget</u>	<u>\$ Var</u>	<u>% Var</u>	<u>FY09</u>	<u>FY08</u>	<u>\$ Var</u>	<u>% Var</u>

Current Period Notes:

- 1) **Passenger Revenue** is over budget due to an increase in ridership.
- 2) **Interest Income** is over budget due to revenue budgeted using County Treasury estimates, while a higher interest rate was actually paid.
- 3) **Other Non-Transp Revenue** is under budget due to contractual changes of the UTU PERS reimbursement received from the County Treasury.
- 4) **Sales Tax Revenue** is slightly over budget for the month due to higher than anticipated receipts in December 2008.

5-2-08



**FY09**  
**Operating Expenses by Department**  
**For the month ending - December 31, 2008**

	Current Period					Year to Date				YTD Year Over Year Comparison			
	Actual	Budget	\$ Var	% Var	Notes	Actual	Budget	\$ Var	% Var	FY09 Actual	FY08	\$ Var	% Var
<b>Departmental Personnel Expenses</b>													
700 - SCCIC	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
1100 - Administration	\$ 58,923	\$ 90,351	\$ (31,428)	-35%		\$ 468,693	\$ 542,680	\$ (73,987)	-14%	\$ 468,693	\$ 440,741	\$ 27,952	6%
1200 - Finance	\$ 82,797	\$ 46,512	\$ 36,285	78%		\$ 339,935	\$ 278,649	\$ 61,286	22%	\$ 339,935	\$ 265,038	\$ 74,897	28%
1300 - Customer Service	\$ 33,573	\$ 37,614	\$ (4,041)	-11%		\$ 212,042	\$ 224,224	\$ (12,182)	-5%	\$ 212,042	\$ 194,766	\$ 17,276	9%
1400 - Human Resources	\$ 41,047	\$ 47,227	\$ (6,180)	-13%		\$ 270,053	\$ 282,962	\$ (12,909)	-5%	\$ 270,053	\$ 236,797	\$ 33,256	14%
1500 - Information Technology	\$ 41,152	\$ 41,239	\$ (87)	0%		\$ 243,837	\$ 247,612	\$ (3,775)	-2%	\$ 243,837	\$ 240,341	\$ 3,496	1%
1700 - District Counsel	\$ 33,544	\$ 36,310	\$ (2,766)	-8%		\$ 205,538	\$ 217,742	\$ (12,204)	-6%	\$ 205,538	\$ 192,780	\$ 12,758	7%
1800 - Risk Management	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
2200 - Facilities Maintenance	\$ 80,037	\$ 82,649	\$ (2,612)	-3%		\$ 466,133	\$ 492,738	\$ (26,605)	-5%	\$ 466,133	\$ 424,889	\$ 41,244	10%
3100 - Paratransit Program	\$ 235,961	\$ 288,412	\$ (52,451)	-18%		\$ 1,470,531	\$ 1,717,440	\$ (246,909)	-14%	\$ 1,470,531	\$ 1,340,392	\$ 130,139	10%
3200 - Operations	\$ 155,318	\$ 178,653	\$ (23,335)	-13%		\$ 961,697	\$ 1,068,185	\$ (106,488)	-10%	\$ 961,697	\$ 951,386	\$ 10,311	1%
3300 - Bus Operators	\$ 1,005,208	\$ 1,130,640	\$ (125,434)	-11%		\$ 6,434,635	\$ 6,744,737	\$ (310,102)	-5%	\$ 6,434,635	\$ 6,078,211	\$ 356,424	6%
4100 - Fleet Maintenance	\$ 290,928	\$ 331,084	\$ (40,156)	-12%		\$ 1,842,957	\$ 2,019,558	\$ (176,601)	-9%	\$ 1,842,957	\$ 1,912,861	\$ (69,904)	-4%
9001 - Cobra Benefits	\$ 40	\$ -	\$ 40	100%		\$ 1,961	\$ -	\$ 1,961	100%	\$ 1,961	\$ 5,122	\$ (3,161)	-62%
9005 - Retired Employee Benefits	\$ 136,929	\$ 143,363	\$ (6,434)	-4%		\$ 766,802	\$ 860,178	\$ (93,376)	-11%	\$ 766,802	\$ 718,715	\$ 48,087	7%
9014 - Operating Grants	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
110020 - Operating Grants	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
100 - New Flyer Parts Credit	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
<b>Subtotal Personnel Expenses</b>	<b>\$ 2,195,455</b>	<b>\$ 2,454,054</b>	<b>\$ (258,599)</b>	<b>-11%</b>		<b>\$ 13,684,814</b>	<b>\$ 14,696,705</b>	<b>\$ (1,011,891)</b>	<b>-7%</b>	<b>\$ 13,684,814</b>	<b>\$ 13,002,039</b>	<b>\$ 682,775</b>	<b>5%</b>
<b>Departmental Non-Personnel Expenses</b>													
700 - SCCIC	\$ 250	\$ -	\$ 250	100%		\$ 270	\$ 300	\$ (30)	-10%	\$ 270	\$ 260	\$ 10	4%
1100 - Administration	\$ 18,672	\$ 50,352	\$ (31,680)	-63%		\$ 110,894	\$ 217,657	\$ (106,763)	-49%	\$ 110,894	\$ 330,429	\$ (219,535)	-66%
1200 - Finance	\$ 90,368	\$ 104,638	\$ (14,270)	-14%		\$ 417,874	\$ 491,422	\$ (73,548)	-15%	\$ 417,874	\$ 350,476	\$ 67,398	19%
1300 - Customer Service	\$ 2,121	\$ 15,799	\$ (13,678)	-87%		\$ 45,808	\$ 56,194	\$ (10,386)	-18%	\$ 45,808	\$ 39,603	\$ 6,205	16%
1400 - Human Resources	\$ 3,830	\$ 7,056	\$ (3,226)	-46%		\$ 18,038	\$ 42,336	\$ (24,298)	-57%	\$ 18,038	\$ 14,230	\$ 3,808	27%
1500 - Information Technology	\$ 14,218	\$ 9,222	\$ 4,996	54%		\$ 55,530	\$ 61,332	\$ (5,802)	-9%	\$ 55,530	\$ 84,793	\$ (29,263)	-35%
1700 - District Counsel	\$ 2,108	\$ 1,691	\$ 417	25%		\$ 7,726	\$ 10,146	\$ (2,420)	-24%	\$ 7,726	\$ 11,339	\$ (3,613)	-32%
1800 - Risk Management	\$ 98	\$ 20,833	\$ (20,735)	-100%		\$ 24,241	\$ 124,998	\$ (100,757)	-81%	\$ 24,241	\$ 15,127	\$ 9,114	60%
2200 - Facilities Maintenance	\$ 119,521	\$ 134,812	\$ (15,291)	-11%		\$ 810,435	\$ 830,371	\$ (19,936)	-2%	\$ 810,435	\$ 223,190	\$ 587,245	263%
3100 - Paratransit Program	\$ 27,255	\$ 65,910	\$ (38,655)	-59%		\$ 346,847	\$ 397,460	\$ (50,613)	-13%	\$ 346,847	\$ 405,569	\$ (58,722)	-14%
3200 - Operations	\$ 40,443	\$ 48,497	\$ (8,054)	-17%		\$ 306,705	\$ 266,982	\$ 39,723	15%	\$ 306,705	\$ 257,635	\$ 49,070	19%
3300 - Bus Operators	\$ -	\$ 334	\$ (334)	-100%		\$ 4,164	\$ 5,504	\$ (1,340)	-24%	\$ 4,164	\$ 4,793	\$ (629)	-13%
4100 - Fleet Maintenance	\$ 114,315	\$ 383,621	\$ (269,306)	-70%		\$ 1,348,151	\$ 2,301,722	\$ (953,571)	-41%	\$ 1,348,151	\$ 1,877,646	\$ (529,495)	-28%
9001 - Cobra Benefits	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ 1,094	\$ (1,094)	-100%
9005 - Retired Employee Benefits	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
9014 - Operating Grants	\$ -	\$ -	\$ -	0%		\$ 11,848	\$ -	\$ 11,848	100%	\$ 11,848	\$ (575)	\$ 12,423	-2161%
110020 - Operating Grants	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
100 - New Flyer Parts Credit	\$ -	\$ -	\$ -	0%		\$ 0	\$ -	\$ 0	100%	\$ 0	\$ -	\$ 0	100%
<b>Subtotal Non-Personnel Expenses</b>	<b>\$ 433,199</b>	<b>\$ 842,765</b>	<b>\$ (409,566)</b>	<b>-49%</b>		<b>\$ 3,508,531</b>	<b>\$ 4,806,424</b>	<b>\$ (1,297,893)</b>	<b>-27%</b>	<b>\$ 3,508,531</b>	<b>\$ 3,615,609</b>	<b>\$ (107,078)</b>	<b>-3%</b>

5-2.03



**FY09**  
**Operating Expenses by Department**  
**For the month ending - December 31, 2008**

	Current Period					Year to Date				YTD Year Over Year Comparison			
	Actual	Budget	\$ Var	% Var	Notes	Actual	Budget	\$ Var	% Var	FY09 Actual	FY08	\$ Var	% Var
<b>Total Departmental Expenses</b>													
700 - SCCIC	\$ 250	\$ -	\$ 250	100%		\$ 270	\$ 300	\$ (30)	-10%	\$ 270	\$ 260	\$ 10	4%
1100 - Administration	\$ 77,595	\$ 140,703	\$ (63,108)	-48%	1	\$ 579,587	\$ 760,337	\$ (180,750)	-24%	\$ 579,587	\$ 771,170	\$ (191,583)	-25%
1200 - Finance	\$ 173,165	\$ 151,150	\$ 22,015	15%	2	\$ 757,809	\$ 770,071	\$ (12,262)	-2%	\$ 757,809	\$ 615,514	\$ 142,295	23%
1300 - Customer Service	\$ 35,894	\$ 53,413	\$ (17,519)	-33%	3	\$ 257,850	\$ 280,418	\$ (22,568)	-8%	\$ 257,850	\$ 234,369	\$ 23,481	10%
1400 - Human Resources	\$ 44,877	\$ 54,283	\$ (9,406)	-17%		\$ 288,091	\$ 325,298	\$ (37,207)	-11%	\$ 288,091	\$ 251,027	\$ 37,064	15%
1500 - Information Technology	\$ 55,370	\$ 50,461	\$ 4,909	10%		\$ 299,367	\$ 308,944	\$ (9,577)	-3%	\$ 299,367	\$ 325,134	\$ (25,767)	-8%
1700 - District Counsel	\$ 35,652	\$ 38,001	\$ (2,349)	-6%		\$ 213,264	\$ 227,888	\$ (14,624)	-6%	\$ 213,264	\$ 204,119	\$ 9,145	4%
1800 - Risk Management	\$ 98	\$ 20,833	\$ (20,735)	-100%	4	\$ 24,241	\$ 124,998	\$ (100,757)	-81%	\$ 24,241	\$ 15,127	\$ 9,114	60%
2200 - Facilities Maintenance	\$ 199,558	\$ 217,461	\$ (17,903)	-8%	5	\$ 1,276,568	\$ 1,323,109	\$ (46,541)	-4%	\$ 1,276,568	\$ 648,079	\$ 628,489	97%
3100 - Paratransit Program	\$ 263,216	\$ 354,322	\$ (91,106)	-26%	6	\$ 1,817,378	\$ 2,114,900	\$ (297,522)	-14%	\$ 1,817,378	\$ 1,745,961	\$ 71,417	4%
3200 - Operations	\$ 195,761	\$ 227,150	\$ (31,389)	-14%	7	\$ 1,268,402	\$ 1,335,167	\$ (66,765)	-5%	\$ 1,268,402	\$ 1,209,021	\$ 59,381	5%
3300 - Bus Operators	\$ 1,005,206	\$ 1,130,974	\$ (125,768)	-11%	8	\$ 6,438,799	\$ 6,750,241	\$ (311,442)	-5%	\$ 6,438,799	\$ 6,083,004	\$ 355,795	6%
4100 - Fleet Maintenance	\$ 405,243	\$ 714,705	\$ (309,462)	-43%	9	\$ 3,191,108	\$ 4,321,280	\$ (1,130,172)	-26%	\$ 3,191,108	\$ 3,790,507	\$ (599,399)	-16%
9001 - Cobra Benefits	\$ 40	\$ -	\$ 40	100%		\$ 1,961	\$ -	\$ 1,961	100%	\$ 1,961	\$ 6,216	\$ (4,255)	-68%
9005 - Retired Employee Benefits	\$ 136,929	\$ 143,363	\$ (6,434)	-4%		\$ 766,802	\$ 860,178	\$ (93,376)	-11%	\$ 766,802	\$ 718,715	\$ 48,087	7%
9014 - Operating Grants	\$ -	\$ -	\$ -	0%		\$ 11,848	\$ -	\$ 11,848	100%	\$ 11,848	\$ (575)	\$ 12,423	-2161%
110020 - Operating Grants	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
100 - New Flyer Parts Credit	\$ -	\$ -	\$ -	0%		\$ 0	\$ -	\$ 0	100%	\$ 0	\$ -	\$ 0	100%
<b>Total Operating Expenses</b>	<b>\$ 2,628,654</b>	<b>\$ 3,296,819</b>	<b>\$ (668,165)</b>	<b>-20%</b>		<b>\$ 17,193,345</b>	<b>\$ 19,503,129</b>	<b>\$ (2,309,784)</b>	<b>-12%</b>	<b>\$ 17,193,345</b>	<b>\$ 16,617,648</b>	<b>\$ 575,697</b>	<b>3%</b>

\*\* does not include depreciation

**Current Period Notes:**

- 1) **Administration** is under budget due to positions being moved to Finance and less than anticipated Prof & Tech Fees (web site redesign).
- 2) **Finance** is over budget due to added positions moved from Administration and Fleet Maintenance.
- 3) **Customer service** is under budget due to printing expenses for Headways budgeted quarterly, but paid in November 2008.
- 4) **Risk Management** is under budget due to below budgeted settlement costs paid in December 2008.
- 5) **Facilities Maintenance** is under budget due to less than anticipated repairs - equipment for the month.
- 6) **Paratransit Program** is under budget due to not being at full complement and less than anticipated fuel and purchased transportation costs.
- 7) **Operations** is under budget due to not being at full complement.
- 8) **Bus Operators** is under budget due to not being at full complement.
- 9) **Fleet** is under budget due to positions moved to Finance and less than anticipated fuel costs.

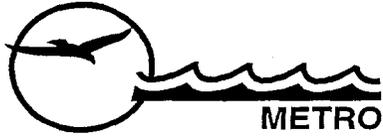
5-2-04



**FY09**  
**Consolidated Operating Expenses**  
 For the month ending - December 31, 2008

	Current Period				Notes	Year to Date				YTD Year Over Year Comparison			
	Actual	Budget	\$ Var	% Var		Actual	Budget	\$ Var	% Var	Actual FY09	FY08	\$ Var	% Var
<b>LABOR</b>													
501011 Bus Operator Pay	\$ 562,476	\$ 677,566	\$ (115,090)	-17%		\$ 3,830,664	\$ 4,065,396	\$ (234,732)	-6%	\$ 3,830,664	\$ 3,610,102	\$ 220,562	6%
501013 Bus Operator Overtime	\$ 107,321	\$ 114,459	\$ (7,138)	-6%		\$ 589,225	\$ 686,754	\$ (97,529)	-14%	\$ 589,225	\$ 592,078	\$ (2,853)	0%
501021 Other Salaries	\$ 443,645	\$ 500,469	\$ (56,824)	-11%		\$ 2,993,917	\$ 3,045,726	\$ (51,809)	-2%	\$ 2,993,917	\$ 2,921,567	\$ 72,350	2%
501023 Other Overtime	\$ 20,545	\$ 24,661	\$ (4,116)	-17%		\$ 124,112	\$ 147,966	\$ (23,854)	-16%	\$ 124,112	\$ 141,588	\$ (17,476)	-12%
<b>Total Labor -</b>	<b>\$ 1,133,987</b>	<b>\$ 1,317,155</b>	<b>\$ (183,168)</b>	<b>-14%</b>		<b>\$ 7,537,918</b>	<b>\$ 7,945,842</b>	<b>\$ (407,924)</b>	<b>-5%</b>	<b>\$ 7,537,918</b>	<b>\$ 7,265,335</b>	<b>\$ 272,583</b>	<b>4%</b>
<b>FRINGE BENEFITS</b>													
502011 Medicare/Soc. Sec.	\$ 16,811	\$ 17,160	\$ (349)	-2%		\$ 105,850	\$ 102,960	\$ 2,890	3%	\$ 105,850	\$ 99,925	\$ 5,925	6%
502021 Retirement	\$ 171,028	\$ 189,461	\$ (18,433)	-10%		\$ 1,096,657	\$ 1,136,766	\$ (40,109)	-4%	\$ 1,096,657	\$ 989,865	\$ 106,792	11%
502031 Medical Insurance	\$ 429,808	\$ 461,116	\$ (31,308)	-7%		\$ 2,487,033	\$ 2,766,696	\$ (279,663)	-10%	\$ 2,487,033	\$ 2,247,851	\$ 239,182	11%
502041 Dental Insurance	\$ 40,586	\$ 41,270	\$ (684)	-2%		\$ 239,054	\$ 247,620	\$ (8,566)	-3%	\$ 239,054	\$ 229,110	\$ 9,944	4%
502045 Vision Insurance	\$ 11,187	\$ 11,591	\$ (404)	-3%		\$ 66,664	\$ 69,546	\$ (2,882)	-4%	\$ 66,664	\$ 65,245	\$ 1,419	2%
502051 Life Insurance	\$ 3,724	\$ 4,164	\$ (440)	-11%		\$ 21,743	\$ 24,981	\$ (3,238)	-13%	\$ 21,743	\$ 19,748	\$ 1,995	10%
502060 State Disability	\$ 13,146	\$ 14,921	\$ (1,775)	-12%		\$ 69,519	\$ 89,526	\$ (20,007)	-22%	\$ 69,519	\$ 54,108	\$ 15,411	28%
502061 Disability Insurance	\$ 18,828	\$ 17,183	\$ 1,645	10%		\$ 107,242	\$ 103,098	\$ 4,144	4%	\$ 107,242	\$ 102,055	\$ 5,187	5%
502071 State Unemp. Ins	\$ 18,821	\$ 16,556	\$ 2,265	14%		\$ 19,430	\$ 18,810	\$ 620	3%	\$ 19,430	\$ 20,444	\$ (1,014)	-5%
502081 Worker's Comp Ins.	\$ 51,700	\$ 91,592	\$ (39,892)	-44%		\$ 484,249	\$ 549,552	\$ (65,303)	-12%	\$ 484,249	\$ 525,104	\$ (40,855)	-8%
502083 Worker's Comp IBNR	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
502101 Holiday Pay	\$ 70,672	\$ 32,290	\$ 38,382	119%		\$ 145,002	\$ 193,742	\$ (48,740)	-25%	\$ 145,002	\$ 179,382	\$ (34,380)	-19%
502103 Floating Holiday	\$ 2,185	\$ 405	\$ 1,780	440%		\$ 10,391	\$ 12,425	\$ (2,034)	-16%	\$ 10,391	\$ 13,519	\$ (3,128)	-23%
502109 Sick Leave	\$ 46,732	\$ 72,390	\$ (25,658)	-35%		\$ 295,540	\$ 434,339	\$ (138,799)	-32%	\$ 295,540	\$ 272,740	\$ 22,800	8%
502111 Annual Leave	\$ 148,410	\$ 142,987	\$ 5,423	4%		\$ 896,631	\$ 857,922	\$ 38,709	5%	\$ 896,631	\$ 812,419	\$ 84,212	10%
502121 Other Paid Absence	\$ 11,555	\$ 11,824	\$ (269)	-2%		\$ 62,096	\$ 70,944	\$ (8,848)	-12%	\$ 62,096	\$ 50,692	\$ 11,404	22%
502251 Physical Exams	\$ 1,050	\$ 1,107	\$ (57)	-5%		\$ 2,805	\$ 6,641	\$ (3,836)	-58%	\$ 2,805	\$ 2,370	\$ 435	18%
502253 Driver Lic Renewal	\$ 34	\$ 362	\$ (328)	-91%		\$ 574	\$ 2,177	\$ (1,603)	-74%	\$ 574	\$ 766	\$ (192)	-25%
502999 Other Fringe Benefits	\$ 5,190	\$ 10,519	\$ (5,329)	-51%		\$ 36,414	\$ 63,114	\$ (26,700)	-42%	\$ 36,414	\$ 51,358	\$ (14,944)	-29%
<b>Total Fringe Benefits -</b>	<b>\$ 1,061,467</b>	<b>\$ 1,136,898</b>	<b>\$ (75,431)</b>	<b>-7%</b>		<b>\$ 6,146,894</b>	<b>\$ 6,750,859</b>	<b>\$ (603,965)</b>	<b>-9%</b>	<b>\$ 6,146,894</b>	<b>\$ 5,736,701</b>	<b>\$ 410,193</b>	<b>7%</b>
<b>Total Personnel Expenses -</b>	<b>\$ 2,195,454</b>	<b>\$ 2,454,053</b>	<b>\$ (258,599)</b>	<b>-11%</b>	<b>1</b>	<b>\$ 13,684,812</b>	<b>\$ 14,696,701</b>	<b>\$ (1,011,889)</b>	<b>-7%</b>	<b>\$ 13,684,812</b>	<b>\$ 13,002,036</b>	<b>\$ 682,776</b>	<b>5%</b>

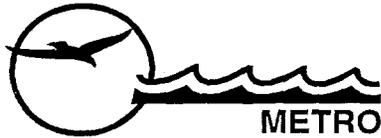
5-2.95



**FY09**  
**Consolidated Operating Expenses**  
**For the month ending - December 31, 2008**

	Current Period					Year to Date				YTD Year Over Year Comparison			
	Actual	Budget	\$ Var	% Var	Notes	Actual	Budget	\$ Var	% Var	FY09 Actual	FY08	\$ Var	% Var
<b>SERVICES</b>													
503011 Acctg & Audit Fees	\$ -	\$ 2,200	\$ (2,200)	-100%		\$ 40,200	\$ 50,250	\$ (10,050)	-20%	\$ 40,200	\$ 38,665	\$ 1,535	4%
503012 Admin & Bank Fees	\$ 47,336	\$ 49,350	\$ (2,014)	-4%		\$ 97,387	\$ 104,150	\$ (6,763)	-6%	\$ 97,387	\$ 44,951	\$ 52,436	117%
503031 Prof & Tech Fees	\$ 9,675	\$ 24,715	\$ (15,040)	-61%	2	\$ 56,528	\$ 144,286	\$ (87,758)	-61%	\$ 56,528	\$ 75,912	\$ (19,384)	-26%
503032 Legislative Services	\$ 7,500	\$ 8,387	\$ (887)	-10%		\$ 45,000	\$ 50,202	\$ (5,202)	-10%	\$ 45,000	\$ 42,970	\$ 2,030	5%
503033 Legal Services	\$ -	\$ 4,583	\$ (4,583)	-100%		\$ -	\$ 27,498	\$ (27,498)	-100%	\$ -	\$ 1,259	\$ (1,259)	-100%
503034 Pre-Employ. Exams	\$ 575	\$ 1,180	\$ (605)	-51%		\$ 5,032	\$ 7,080	\$ (2,048)	-29%	\$ 5,032	\$ 5,086	\$ (54)	-1%
503041 Temp Help	\$ 10,053	\$ -	\$ 10,053	100%	3	\$ 74,324	\$ -	\$ 74,324	100%	\$ 74,324	\$ 66,602	\$ 7,722	12%
503161 Custodial Services	\$ 7,292	\$ 5,642	\$ 1,650	29%		\$ 35,548	\$ 33,852	\$ 1,696	5%	\$ 35,548	\$ 32,674	\$ 2,874	9%
503162 Uniform & Laundry	\$ 2,533	\$ 3,629	\$ (1,096)	-30%		\$ 18,933	\$ 21,774	\$ (2,841)	-13%	\$ 18,933	\$ 20,147	\$ (1,214)	-6%
503171 Security Services	\$ 16,463	\$ 34,083	\$ (17,620)	-52%	4	\$ 180,732	\$ 204,498	\$ (23,766)	-12%	\$ 180,732	\$ 164,712	\$ 16,020	10%
503221 Classified/Legal Ads	\$ 241	\$ 2,475	\$ (2,234)	-90%		\$ 6,985	\$ 14,850	\$ (7,865)	-53%	\$ 6,985	\$ 6,161	\$ 824	13%
503222 Legal Advertising	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
503225 Graphic Services	\$ -	\$ 417	\$ (417)	-100%		\$ -	\$ 2,502	\$ (2,502)	-100%	\$ -	\$ -	\$ -	0%
503351 Repair - Bldg & Impr	\$ 4,358	\$ 7,500	\$ (3,142)	-42%		\$ 45,929	\$ 45,000	\$ 929	2%	\$ 45,929	\$ 37,659	\$ 8,270	22%
503352 Repair - Equipment	\$ 17,933	\$ 39,037	\$ (21,104)	-54%	5	\$ 155,384	\$ 236,222	\$ (80,838)	-34%	\$ 155,384	\$ 78,374	\$ 77,010	98%
503353 Repair - Rev Vehicle	\$ 42,404	\$ 30,000	\$ 12,404	41%	6	\$ 270,426	\$ 180,000	\$ 90,426	50%	\$ 270,426	\$ 142,504	\$ 127,922	90%
503354 Repair - Non Rev Vehicle	\$ 2,141	\$ 2,500	\$ (359)	-14%		\$ 13,025	\$ 15,000	\$ (1,975)	-13%	\$ 13,025	\$ 13,310	\$ (285)	-2%
503363 Haz Mat Disposal	\$ 7,737	\$ 2,517	\$ 5,220	207%	7	\$ 26,289	\$ 15,099	\$ 11,190	74%	\$ 26,289	\$ 13,966	\$ 12,303	88%
<b>Total Services -</b>	<b>\$ 176,241</b>	<b>\$ 218,195</b>	<b>\$ (41,954)</b>	<b>-19%</b>		<b>\$ 1,071,722</b>	<b>\$ 1,152,263</b>	<b>\$ (80,541)</b>	<b>-7%</b>	<b>\$ 1,071,722</b>	<b>\$ 784,972</b>	<b>\$ 286,750</b>	<b>37%</b>
<b>MOBILE MATERIALS AND SUPPLIES</b>													
504011 Fuels & Lube Non Rev Veh	\$ 3,517	\$ 16,417	\$ (12,900)	-79%		\$ 82,915	\$ 98,502	\$ (15,587)	-16%	\$ 82,915	\$ 70,498	\$ 12,417	18%
504012 Fuels & Lube Rev Veh	\$ 29,903	\$ 262,500	\$ (232,597)	-89%	8	\$ 818,475	\$ 1,575,000	\$ (756,525)	-48%	\$ 818,475	\$ 1,094,097	\$ (275,622)	-25%
504021 Tires & Tubes	\$ 9,629	\$ 17,083	\$ (7,454)	-44%		\$ 114,347	\$ 102,498	\$ 11,849	12%	\$ 114,347	\$ 92,848	\$ 21,499	23%
504161 Other Mobile Supplies	\$ 2,100	\$ 833	\$ 1,267	152%		\$ 6,462	\$ 4,998	\$ 1,464	29%	\$ 6,462	\$ 3,285	\$ 3,177	97%
504191 Rev Vehicle Parts	\$ 33,583	\$ 64,750	\$ (31,167)	-48%	9	\$ 149,155	\$ 388,500	\$ (239,345)	-62%	\$ 149,155	\$ 356,476	\$ (207,321)	-58%
<b>Total Mobile Materials &amp; Supplies -</b>	<b>\$ 78,732</b>	<b>\$ 361,583</b>	<b>\$ (282,851)</b>	<b>-78%</b>		<b>\$ 1,171,354</b>	<b>\$ 2,169,498</b>	<b>\$ (998,144)</b>	<b>-46%</b>	<b>\$ 1,171,354</b>	<b>\$ 1,617,204</b>	<b>\$ (445,850)</b>	<b>-28%</b>

5-2.06



**FY09**  
**Consolidated Operating Expenses**  
**For the month ending - December 31, 2008**

	Current Period					Year to Date				YTD Year Over Year Comparison			
	Actual	Budget	\$ Var	% Var	Notes	Actual	Budget	\$ Var	% Var	FY09 Actual	FY08	\$ Var	% Var
<b>OTHER MATERIALS &amp; SUPPLIES</b>													
504205 Freight Out	\$ 129	\$ 292	\$ (163)	-56%		\$ 1,290	\$ 1,752	\$ (462)	-26%	\$ 1,290	\$ 1,487	\$ (197)	-13%
504211 Postage & Mailing	\$ 215	\$ 1,720	\$ (1,505)	-88%		\$ 4,299	\$ 10,320	\$ (6,021)	-58%	\$ 4,299	\$ 7,708	\$ (3,409)	-44%
504214 Promotional Items	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
504215 Printing	\$ 1,453	\$ 15,400	\$ (13,947)	-91%	10	\$ 38,274	\$ 52,400	\$ (14,126)	-27%	\$ 38,274	\$ 27,240	\$ 11,034	41%
504217 Photo Supply/Processing	\$ 77	\$ 808	\$ (731)	-90%		\$ 4,252	\$ 4,848	\$ (596)	-12%	\$ 4,252	\$ 2,877	\$ 1,375	48%
504311 Office Supplies	\$ 8,271	\$ 7,455	\$ 816	11%		\$ 42,098	\$ 44,730	\$ (2,632)	-6%	\$ 42,098	\$ 42,597	\$ (499)	-1%
504315 Safety Supplies	\$ 535	\$ 2,692	\$ (2,157)	-80%		\$ 8,692	\$ 16,152	\$ (7,460)	-46%	\$ 8,692	\$ 17,133	\$ (8,441)	-49%
504317 Cleaning Supplies	\$ 236	\$ 4,500	\$ (4,264)	-95%		\$ 18,876	\$ 27,000	\$ (8,124)	-30%	\$ 18,876	\$ 23,887	\$ (4,811)	-20%
504409 Repair/Maint Supplies	\$ 4,961	\$ 3,833	\$ 1,128	29%		\$ 33,960	\$ 22,998	\$ 10,962	48%	\$ 33,960	\$ 21,528	\$ 12,432	58%
504421 Non-Inventory Parts	\$ 7,578	\$ 3,500	\$ 4,078	117%	11	\$ 42,400	\$ 23,500	\$ 18,900	80%	\$ 42,400	\$ 23,169	\$ 19,231	83%
504511 Small Tools	\$ -	\$ 833	\$ (833)	-100%		\$ 3,147	\$ 4,998	\$ (1,851)	-37%	\$ 3,147	\$ 5,067	\$ (1,920)	-38%
504515 Employee Tool Rplmt	\$ 213	\$ 216	\$ (3)	-1%		\$ 1,135	\$ 1,301	\$ (166)	-13%	\$ 1,135	\$ 509	\$ 626	123%
<b>Total Other Materials &amp; Supplies -</b>	<b>\$ 23,668</b>	<b>\$ 41,249</b>	<b>\$ (17,581)</b>	<b>-43%</b>		<b>\$ 198,423</b>	<b>\$ 209,999</b>	<b>\$ (11,576)</b>	<b>-6%</b>	<b>\$ 198,423</b>	<b>\$ 173,002</b>	<b>\$ 25,421</b>	<b>15%</b>
<b>UTILITIES</b>													
505011 Gas & Electric	\$ 15,164	\$ 18,418	\$ (3,254)	-18%		\$ 92,443	\$ 110,507	\$ (18,064)	-16%	\$ 92,443	\$ 103,036	\$ (10,593)	-10%
505021 Water & Garbage	\$ 8,976	\$ 10,313	\$ (1,337)	-13%		\$ 66,446	\$ 61,878	\$ 4,568	7%	\$ 66,446	\$ 57,496	\$ 8,950	16%
505031 Telecommunications	\$ 14,137	\$ 10,025	\$ 4,112	41%		\$ 53,518	\$ 60,151	\$ (6,633)	-11%	\$ 53,518	\$ 42,893	\$ 10,625	25%
<b>Total Utilities -</b>	<b>\$ 38,277</b>	<b>\$ 38,756</b>	<b>\$ (479)</b>	<b>-1%</b>		<b>\$ 212,407</b>	<b>\$ 232,536</b>	<b>\$ (20,129)</b>	<b>-9%</b>	<b>\$ 212,407</b>	<b>\$ 203,425</b>	<b>\$ 8,982</b>	<b>4%</b>
<b>CASUALTY &amp; LIABILITY</b>													
506011 Insurance - Property	\$ 2,320	\$ 9,862	\$ (7,542)	-76%	12	\$ 31,880	\$ 59,172	\$ (27,292)	-46%	\$ 31,880	\$ 19,849	\$ 12,031	61%
506015 Insurance - PL & PD	\$ 40,526	\$ 42,500	\$ (1,974)	-5%		\$ 243,156	\$ 255,000	\$ (11,844)	-5%	\$ 243,156	\$ 206,171	\$ 36,985	18%
506021 Insurance - Other	\$ -	\$ -	\$ -	0%		\$ 711	\$ 801	\$ (90)	-11%	\$ 711	\$ 1,007	\$ (296)	-29%
506123 Settlement Costs	\$ -	\$ 12,500	\$ (12,500)	-100%	13	\$ 23,041	\$ 75,000	\$ (51,959)	-69%	\$ 23,041	\$ 14,820	\$ 8,221	55%
506127 Repairs - Dist Prop	\$ -	\$ -	\$ -	0%		\$ (21,452)	\$ -	\$ (21,452)	100%	\$ (21,452)	\$ (7,514)	\$ (13,938)	185%
<b>Total Casualty &amp; Liability -</b>	<b>\$ 42,846</b>	<b>\$ 64,862</b>	<b>\$ (22,016)</b>	<b>-34%</b>		<b>\$ 277,336</b>	<b>\$ 389,973</b>	<b>\$ (112,637)</b>	<b>-29%</b>	<b>\$ 277,336</b>	<b>\$ 234,333</b>	<b>\$ 43,003</b>	<b>18%</b>
<b>TAXES</b>													
507051 Fuel Tax	\$ 783	\$ 917	\$ (134)	-15%		\$ 3,704	\$ 5,501	\$ (1,797)	-33%	\$ 3,704	\$ 4,032	\$ (328)	-8%
507201 Licenses & permits	\$ -	\$ 1,113	\$ (1,113)	-100%		\$ 4,330	\$ 7,576	\$ (3,246)	-43%	\$ 4,330	\$ 4,106	\$ 224	5%
507999 Other Taxes	\$ -	\$ 500	\$ (500)	-100%		\$ 20,403	\$ 22,000	\$ (1,597)	-7%	\$ 20,403	\$ 12,035	\$ 8,368	70%
<b>Total Utilities -</b>	<b>\$ 783</b>	<b>\$ 2,530</b>	<b>\$ (1,747)</b>	<b>-69%</b>		<b>\$ 28,437</b>	<b>\$ 35,077</b>	<b>\$ (6,640)</b>	<b>-19%</b>	<b>\$ 28,437</b>	<b>\$ 20,173</b>	<b>\$ 8,264</b>	<b>41%</b>

5-2.97



**FY09**  
**Consolidated Operating Expenses**  
**For the month ending - December 31, 2008**

	Current Period					Year to Date				YTD Year Over Year Comparison			
	Actual	Budget	\$ Var	% Var	Notes	Actual	Budget	\$ Var	% Var	FY09 Actual	FY08	\$ Var	% Var
<b><u>PURCHASED TRANSPORTATION</u></b>													
503406 Contr/Paratrans	\$ (2,794)	\$ 20,833	\$ (23,627)	-113%	14	\$ 106,279	\$ 124,998	\$ (18,719)	-15%	\$ 106,279	\$ 170,370	\$ (64,091)	-38%
Total Purchased Transportation -	\$ (2,794)	\$ 20,833	\$ (23,627)	-113%		\$ 106,279	\$ 124,998	\$ (18,719)	-15%	\$ 106,279	\$ 170,370	\$ (64,091)	-38%
<b><u>MISC</u></b>													
509011 Dues & Subscriptions	\$ 5,216	\$ 5,355	\$ (139)	-3%		\$ 31,592	\$ 32,130	\$ (538)	-2%	\$ 31,592	\$ 9,167	\$ 22,425	245%
509085 Advertising - Rev Product	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ -	\$ -	0%
509101 Emp Incentive Prog	\$ 1,446	\$ 18,000	\$ (16,554)	-92%		\$ 5,540	\$ 27,045	\$ (21,505)	-80%	\$ 5,540	\$ 11,446	\$ (5,906)	-52%
509121 Employee Training	\$ 3,858	\$ 2,492	\$ 1,366	55%		\$ 16,857	\$ 20,952	\$ (4,095)	-20%	\$ 16,857	\$ 12,608	\$ 4,249	34%
509123 Travel	\$ 1,262	\$ 6,003	\$ (4,741)	-79%		\$ 19,852	\$ 36,016	\$ (16,164)	-45%	\$ 19,852	\$ 13,988	\$ 5,864	42%
509125 Local Meeting Exp	\$ 1,072	\$ 390	\$ 682	175%		\$ 2,244	\$ 2,340	\$ (96)	-4%	\$ 2,244	\$ 1,460	\$ 784	54%
509127 Board Director Fees	\$ 1,050	\$ 1,100	\$ (50)	-5%		\$ 5,600	\$ 6,600	\$ (1,000)	-15%	\$ 5,600	\$ 6,750	\$ (1,150)	-17%
509150 Contributions	\$ -	\$ 54	\$ (54)	-100%		\$ -	\$ 324	\$ (324)	-100%	\$ -	\$ 98	\$ (98)	-100%
509197 Sales Tax Expense	\$ -	\$ -	\$ -	0%		\$ -	\$ -	\$ -	0%	\$ -	\$ (52)	\$ 52	-100%
509198 Cash Over/Short	\$ 26	\$ 42	\$ (16)	-38%		\$ (240)	\$ 252	\$ (492)	-195%	\$ (240)	\$ 72	\$ (312)	-433%
Total Misc -	\$ 13,930	\$ 33,436	\$ (19,506)	-58%		\$ 81,445	\$ 125,659	\$ (44,214)	-35%	\$ 81,445	\$ 55,537	\$ 25,908	47%
<b><u>LEASES &amp; RENTALS</u></b>													
512011 Facility Rentals	\$ 59,081	\$ 58,721	\$ 360	1%		\$ 351,745	\$ 352,327	\$ (582)	0%	\$ 351,745	\$ 345,177	\$ 6,568	2%
512061 Equipment Rentals	\$ 2,435	\$ 2,600	\$ (165)	-6%		\$ 9,380	\$ 14,100	\$ (4,720)	-33%	\$ 9,380	\$ 11,419	\$ (2,039)	-18%
Total Leases & Rentals -	\$ 61,516	\$ 61,321	\$ 195	0%		\$ 361,125	\$ 366,427	\$ (5,302)	-1%	\$ 361,125	\$ 356,596	\$ 4,529	1%
<b>Total Non-Personnel Expenses -</b>	<b>\$ 433,199</b>	<b>\$ 842,765</b>	<b>\$ (409,566)</b>	<b>-49%</b>		<b>\$ 3,508,528</b>	<b>\$ 4,806,430</b>	<b>\$ (1,297,902)</b>	<b>-27%</b>	<b>\$ 3,508,528</b>	<b>\$ 3,615,612</b>	<b>\$ (107,084)</b>	<b>-3%</b>
<b>TOTAL OPERATING EXPENSE -</b>	<b>\$ 2,628,653</b>	<b>\$ 3,296,818</b>	<b>\$ (668,165)</b>	<b>-20%</b>		<b>\$ 17,193,340</b>	<b>\$ 19,503,131</b>	<b>\$ (2,309,791)</b>	<b>-12%</b>	<b>\$ 17,193,340</b>	<b>\$ 16,617,648</b>	<b>\$ 575,692</b>	<b>3%</b>

\*\* does not include depreciation

**Current Period Notes:**

- 1) Total Personnel Expenses are below budget due to not being at full complement, and lower than anticipated medical costs.
- 2) Prof & Tech Fees are below budget due to anticipated website redesign costs straight-lined.
- 3) Temp Help is over budget due to vacancies and work loads.

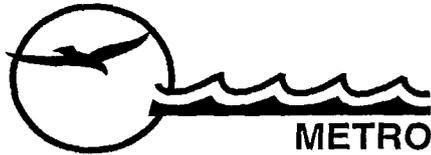
5-2.08



**FY09**  
**Consolidated Operating Expenses**  
*For the month ending - December 31, 2008*

	Current Period					Year to Date				YTD Year Over Year Comparison			
	<u>Actual</u>	<u>Budget</u>	<u>\$ Var</u>	<u>% Var</u>	<u>Notes</u>	<u>Actual</u>	<u>Budget</u>	<u>\$ Var</u>	<u>% Var</u>	<u>FY09</u> Actual	<u>FY08</u>	<u>\$ Var</u>	<u>% Var</u>
4) Security Services					are under budget due to accruals correction in December 2008.								
5) Repair - Equipment					is under budget due to inability to anticipate when repair costs will be incurred.								
6) Repair - Rev Vehicle					is over budget due to an aging fleet that requires increased repairs.								
7) Haz Mat Disposal					is over budget due to increased expenses in December 2008.								
8) Fuels & Lube Rev Veh					is under budget due to the CNG conversion and the resulting economies in fuel consumption.								
9) Rev Veh Parts					is under budget due to the straight lining of the budget and the bulk acquisition of parts in the previous month.								
10) Printing					is under budget due to printing expenses for Headways, budgeted quarterly in Customer Service, but paid in November 2008.								
11) Non-Inventory Parts					is over budget due to initial setup for new fastener vendor - Kimball Midwest for Fleet and increased costs.								
12) Insurance-Property					is under budget due to Tenants Annual Pro-Rated Shares of Property Insurance credits in December 2008.								
13) Settlement costs					are under budget due to less than anticipated settlement costs for the month.								
14) Contr/Paratrans					is under budget due to correction entry posted in December 2008.								

5-2.09

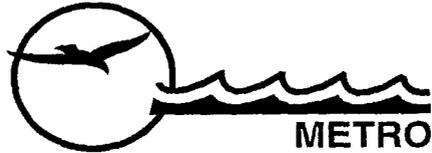


**FY2009  
CAPITAL BUDGET**

*For the month ending - December 31, 2008*

	<u>YTD Actual</u>		<u>FY09 Budget</u>		<u>Remaining Budget</u>		<u>% Spent YTD</u>
<b><u>Grant-Funded Projects</u></b>							
MetroBase Maintenance Facility	\$ 1,724,689	\$	3,605,404	\$	1,880,715		48%
MetroBase Operations Facility	\$ 42	\$	9,404,019	\$	9,403,977		0%
Local Bus Replacement	\$ 3,566,858	\$	3,572,932	\$	6,074		100%
CNG Bus Conversions	\$ 1,382,989	\$	3,410,000	\$	2,027,011		41%
Pacific Station Project	\$ 3,392	\$	3,190,300	\$	3,186,908		0%
H17 Bus Replacement	\$ 2,359,041	\$	2,359,050	\$	9		100%
Advanced Traveller Information System	\$ -	\$	500,000	\$	500,000		0%
Facility Camera Security System	\$ -	\$	220,000	\$	220,000		0%
Bus Camera Project	\$ -	\$	205,000	\$	205,000		0%
Trapeze Pass Interactive Voice Response System	\$ -	\$	91,141	\$	91,141		0%
Replace Dispatch Console	\$ 18,048	\$	25,000	\$	6,952		72%
<b>Subtotal Grant Funded Projects</b>	<b>\$ 9,055,059</b>	<b>\$</b>	<b>26,582,846</b>	<b>\$</b>	<b>17,527,787</b>		<b>34%</b>
<b><u>District Funded Projects</u></b>							
<b><u>IT Projects</u></b>							
Replace Fleet & Facilities Maintenance Software	\$ -	\$	470,000	\$	470,000		0%
Upgrade District Phone System	\$ -	\$	100,000	\$	100,000		0%
GFI Data Warehouse Project: Phase I	\$ 3,743	\$	65,000	\$	61,257		6%
Replace 4 Windows and 1 Sun Server	\$ 49,496	\$	50,000	\$	504		99%
Trapeze Pass Customer Certification Software	\$ -	\$	46,000	\$	46,000		0%
ATP - Hastus Run Time Analysis Program - IT/OPS	\$ 18,695	\$	19,264	\$	569		97%
Upgrade GFI software to System 7 Version 2	\$ -	\$	17,000	\$	17,000		0%
(2) Laptops (1) IT (1) Financial Analyst	\$ 3,551	\$	4,500	\$	949		79%
FMLA Tracking Software	\$ -	\$	4,000	\$	4,000		0%
Portable Projector w/case	\$ -	\$	2,000	\$	2,000		0%
<b><u>Facilities Repair &amp; Improvements</u></b>							
Bus Stop Improvements	\$ -	\$	179,900	\$	179,900		0%
Passenger Waiting Shelters - LNI (10)	\$ -	\$	70,000	\$	70,000		0%
Replace Roof - Watsonville Transit Center Main Building	\$ -	\$	50,000	\$	50,000		0%
Patch, Reseal, and Restripe - Greyhound Lot	\$ -	\$	21,390	\$	21,390		0%
Digital ID Card Processing Equipment	\$ -	\$	17,000	\$	17,000		0%
Fencing - Service Bldg. 1200B River St.	\$ -	\$	16,000	\$	16,000		0%
Patch, Reseal, Restripe - Cavallaro Transit Center (SVT)	\$ -	\$	7,550	\$	7,550		0%
Patch, Reseal, Restripe - Soquel Park & Ride Lot	\$ -	\$	5,650	\$	5,650		0%
Reseal Operations Facility Roof-FY08 - Retention Invoice	\$ 2,663	\$	-	\$	(2,663)		100%
Add Alarm Audio/Visual - OPS Bldg	\$ 1,744	\$	-	\$	(1,744)		100%
Spare Posi/Lock - 105 Nozzle Assembly	\$ -	\$	1,208	\$	1,208		0%

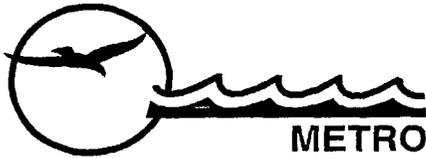
5-2.910



**FY2009**  
**CAPITAL BUDGET**  
*For the month ending - December 31, 2008*

	<u>YTD Actual</u>		<u>FY09 Budget</u>		<u>Remaining Budget</u>	<u>% Spent YTD</u>
<b><u>Revenue Vehicle Replacement</u></b>						
ParaCruz Van - Replacements (27)	\$ -	\$	2,840,804	\$	2,840,804	0%
ParaCruz Van - Expansion (3)	\$ -	\$	300,000	\$	300,000	0%
Rebuild Bus Engines - 1998 Fleet	\$ 176,058	\$	106,302	\$	(69,756)	166%
<b><u>Non-Revenue Vehicle Replacement</u></b>						
Supervisor Vehicle - Hybrid	\$ -	\$	29,500	\$	29,500	0%
DGS Fees - Last FY Purchase	\$ 1,651	\$	-	\$	(1,651)	100%
<b><u>Maint Equipment</u></b>						
Replace Repeater for Davenport	\$ -	\$	15,000	\$	15,000	0%
Portable Steam Cleaner - Transit Center cleaning	\$ 10,081	\$	11,207	\$	1,126	90%
Battery Powered Walk Behind Sweeper - Pacific Station	\$ 5,285	\$	5,500	\$	215	96%
Wet/Dry Vac - Pacific Station, & other Metro facilities	\$ -	\$	1,400	\$	1,400	0%
Decelerometer w/Printer	\$ -	\$	1,323	\$	1,323	0%
2000 Watt Generator	\$ 1,095	\$	1,200	\$	105	91%
<b><u>Office Equipment</u></b>						
Digital Cameras - Supervisors (12)	\$ -	\$	3,500	\$	3,500	100%
<b><u>Admin</u></b>						
Purchase & Renovation of Vernon Bldg	\$ 19,792	\$	2,962,139	\$	2,942,347	1%
<hr/>						
Subtotal District Funded Projects	\$ 293,853	\$	7,424,337	\$	7,130,484	4%
<hr/>						
<b>TOTAL CAPITAL PROJECTS</b>	<b>\$ 9,348,912</b>	<b>\$</b>	<b>34,007,183</b>	<b>\$</b>	<b>24,658,271</b>	<b>27%</b>

5-2-2011



**FY2009  
CAPITAL BUDGET**

*For the month ending - December 31, 2008*

	<u>YTD Actual</u>	<u>FY09 Budget</u>	<u>Remaining Budget</u>	<u>% Spent YTD</u>
<b><u>CAPITAL FUNDING</u></b>				
Federal Capital Grants	\$ 752,084	\$ 2,668,343	\$ 1,916,258	28%
State/Other Capital Grants (STIP)	\$ 6,582,989	\$ 8,610,000	\$ 2,027,011	76%
State/Other Capital Grants (1B PTMISEA)	\$ 540,848	\$ 4,404,019	\$ 3,863,171	12%
State/Other Capital Grants (TCRP)	\$ 3,392	\$ 873,216	\$ 869,824	0%
State/Other Capital Grants	\$ -	\$ 500,000	\$ 500,000	0%
State Security Bond Funds (1B)	\$ 18,048	\$ 440,505	\$ 422,457	4%
STA Funding (Current Year) *	\$ -	\$ 4,918,675	\$ 4,918,675	0%
STA Funding (Prior Year)	\$ 557,752	\$ 574,325	\$ 16,573	97%
Alternative Fuel Conversion Fund	\$ 462,000	\$ 462,000	\$ -	100%
District Reserves (Lawsuit & Sakata Proceeds)	\$ 431,799	\$ 6,440,577	\$ 6,008,778	7%
Capital Reserves	\$ -	\$ 4,115,523	\$ 4,115,523	0%
<b>TOTAL CAPITAL FUNDING</b>	<b>\$ 9,348,912</b>	<b>\$ 34,007,183</b>	<b>\$ 24,658,270</b>	<b>27%</b>

\* Based on FY09 STA Claim of \$5,340,804

5-2.9.12



## **AGENDA**

**FEBRUARY 18, 2009 - 6:00 PM  
PACIFIC STATION CONFERENCE ROOM  
920 PACIFIC AVENUE, SANTA CRUZ, CALIFORNIA**

- 1. ROLL CALL**
- 2. AGENDA ADDITIONS/DELETIONS**
- 3. ORAL/WRITTEN COMMUNICATION**
- 4. CONSIDERATION OF APPROVAL OF MINUTES OF JANUARY 21, 2009**
- 5. FILE RIDERSHIP REPORT FOR NOVEMBER 2008 (NOT AVAILABLE)**
- 6. FILE PARACRUZ OPERATIONS STATUS REPORT FOR OCTOBER 2008**
- 7. ELECTION OF OFFICERS**
- 8. CONSIDERATION OF MAC 2009 REGULAR MEETING CALENDAR**
- 9. REPORT BY MAC REPRESENTATIVE TO OTHER TRANSIT RELATED MEETINGS**
- 10. DISCUSSION OF REVISED ELDERLY AND PERSONS WITH DISABILITIES FIXED ROUTE DISCOUNT FARE POLICY**
- 11. CONSIDERATION OF FIXED ROUTE HOLIDAY SERVICE**
- 12. CONSIDERATION OF DESIGNATED DISABLED PARKING SPACE AT THE WATSONVILLE TRANSIT CENTER**
- 13. DISTRIBUTION OF MAC VOUCHERS**
- 14. COMMUNICATIONS TO METRO GENERAL MANAGER**
- 15. COMMUNICATIONS TO METRO BOARD OF DIRECTORS**
- 16. ITEMS FOR NEXT MEETING AGENDA**
- 17. ADJOURNMENT**

*NEXT MEETING: WEDNESDAY, MARCH 18, 2009, AT 6:00 PM  
PACIFIC STATION CONFERENCE ROOM*

**5-4.1**

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT**

**Minutes - METRO Advisory Committee (MAC)**

**December 17, 2008**

The METRO Advisory Committee (MAC) met on Wednesday, December 17, 2008 in the Pacific Station Conference Room located at 920 Pacific Avenue in Santa Cruz, California.

Chair Naomi Gunther called the meeting to order at 6:10 p.m.

**1. ROLL CALL:**

**MEMBERS PRESENT**

Naomi Gunther, Chair  
Mara Murphy, Vice Chair  
Dennis "Pop" Papadopulo  
Stuart Rosenstein  
Dave Williams  
Robert Yount

**MEMBERS ABSENT**

Heidi Curry

**VISITORS PRESENT**

Steve Prince, Bus Operator/ UTU Rep.

**STAFF PRESENT**

Ciro Aguirre, Operations Manager  
Mary Ferrick, Fixed Route Superint.  
Margaret Gallagher, District Counsel  
April Warnock, Paratransit Superint.

**2. AGENDA ADDITIONS/DELETIONS**

None.

**3. ORAL/WRITTEN COMMUNICATION**

Written:

Robert Yount distributed an article from a magazine titled "The Challenge Of Inclusiveness: Common Medical Conditions Impacting Transit Today", which is attached to the file copy of these minutes.

Oral:

None.

**4. CONSIDERATION OF MINUTES OF NOVEMBER 19, 2008**

**ACTION: MOTION: DENNIS PAPADOPULO SECOND: ROBERT YOUNT**

**ACCEPT AND FILE MINUTES OF THE NOVEMBER 19, 2008 MEETING AS PRESENTED.**

**Motion passed unanimously with Heidi Curry being absent.**

5-4.2

**5. RIDERSHIP REPORT FOR SEPTEMBER 2008**

Robert Yount mentioned that route 10 had a large increase in bikes. Dennis Papadopulo commented that he's seen some really small folding bikes, which is great because they don't take up much room inside the bus.

There was discussion of the Highway 17 Express running more frequently with extra buses per running time and more trips, which has increased ridership.

**6. PARACRUZ OPERATIONS STATUS REPORT FOR AUGUST 2008**

Chair Naomi Gunther noted the volume of trips increased, which impacts statistics. April Warnock reported the volume increased slightly, but the rides greater than 10 miles increased and that is reflective of the San Lorenzo Valley and people traveling between Watsonville and Santa Cruz.

April Warnock explained the frequency of rider trips and the reason the shared rides fluctuate and how it is reflected on the graphs.

There was a discussion of the history of METRO taking over direct operation of ParaCruz service, which was previously performed by Community Bridges.

**7. CONSIDERATION OF WHETHER METRO SHOULD ALLOW PARACRUZ ELIGIBLE RIDERS FREE FARES ON METRO'S FIXED ROUTE**

Margaret Gallagher said it is recognized that some persons with disabilities are not able to use fixed route services even if the services are accessible. Complementary paratransit service is required by the ADA to serve persons, who are because of a disability unable to utilize the fixed route.

ParaCruz fares are \$3.00 a ride, fixed route is \$1.50 and Senior/Disabled fixed route fare is \$0.75. Paratransit eligible riders can ride the fixed route service for half the current fare or \$0.75. METRO believes the differential in the cost is already an incentive and suggest that MAC not recommend to the Board of Directors that persons who are eligible for paratransit service be allowed to utilize fixed route for free.

**ACTION: MOTION: ROBERT YOUNT SECOND: DENNIS "POP" PAPADOPULO**

**MAC RECOMMENDS THAT SANTA CRUZ METROPOLITAN TRANSIT DISTRICT NOT OFFER ELIGIBLE PARATRANSIT RIDERS FREE FARES ON METRO'S FIXED ROUTE SERVICES**

**Motion passed unanimously with Heidi Curry being absent.**

**8. REPORT BY MAC REPRESENTATIVE TO OTHER TRANSIT RELATED MEETINGS**

Robert Yount stated that the BSAC did not have a quorum for their last meeting, so there is nothing to report.

**9. DISCUSS POSSIBILITY OF A WATSONVILLE MEETING AND ALTERNATE MEETING LOCATIONS**

Margaret Gallagher discussed the possibility of having a MAC meeting at the Watsonville Library and the impact to staff to have the meeting at another location. Mrs. Gallagher suggested developing a comprehensive plan which could include identifying groups in Watsonville for the purpose of MAC members attending these meetings, giving a presentation introducing MAC and METRO and to extend an invitation for them to join a MAC meeting to discuss transportation issues. The concern being that unless a lot of ground work is done before a meeting is scheduled in Watsonville no one will attend and so the goal of getting input from others will not occur.

MAC members discussed the reason for having the meeting in Watsonville and Scotts Valley was to receive information, input and fill vacancies on the committee. Stuart Rosenstein thinks MAC needs to be more visible and fill the vacancies on MAC with a diverse group of people to get more input.

Ciro Aguirre, April Warnock and Mary Ferrick discussed several opportunities that METRO has taken advantage of to promote the advisory committee, service and improvements to service at some recent functions such as Branciforte Bridge inauguration, Second Harvest Food Bank outreach to the community facility viewing, Going Green Fair and Cal EXPO.

Vice Chair Mara Murphy reported she has advertised MAC meetings on the Santa Cruz Sentinel website.

**10. DISTRIBUTION OF MAC VOUCHERS**

Ciro Aguirre distributed a copy of a staff report recommending that the Board of Directors take action on December 19, 2008, to reappoint current members of the METRO Advisory Committee whose terms expire December 31, 2008 to new terms, which is attached to the file copy of these minutes. Mr. Aguirre also distributed METRO MAC vouchers to the MAC members at this time.

**11. COMMUNICATIONS TO METRO GENERAL MANAGER**

None.

**12. COMMUNICATIONS TO METRO BOARD OF DIRECTORS**

None.

**13. ITEMS FOR NEXT MEETING AGENDA**

- ParaCruz Passenger Loading and Unloading at Watsonville Transit Center
- Fixed Route Holiday Service
- Published Bus Schedules and Connections
- Bus Operator Shifts
- MAC 2009 Calendar

**ADJOURN**

There being no further business, Chair Naomi Gunther thanked everyone for participating and adjourned the meeting at 7:40 p.m.

Respectfully submitted,



KAREN BLIGHT  
Administrative Assistant

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27<sup>th</sup>, 2009  
**TO:** Board of Directors  
**FROM:** April Warnock, Paratransit Superintendent  
**SUBJECT:** METRO PARACRUZ OPERATIONS STATUS REPORT

## I. RECOMMENDED ACTION

**This report is for information only - no action requested**

## II. SUMMARY OF ISSUES

- METRO ParaCruz is the federally mandated ADA complementary paratransit program of the Transit District, providing shared ride, door-to-door demand-response transportation to customers certified as having disabilities that prevent them from independently using the fixed route bus.
- METRO assumed direct operation of paratransit services November 1, 2004.
- Operating Statistics and customer feedback information reported are for the month of November 2008.
- ParaCruz Performance Goals are reflected in the Comparative Statistics Table in order to better compare actual performance.
- A breakdown of pick-up times beyond the ready window is included.
- At the January 23<sup>rd</sup>, 2008 METRO Board of Directors meeting, Staff was requested to provide additional information on the number of ParaCruz in-person eligibility assessments in comparison to past years, since implementation.

## III. DISCUSSION

METRO ParaCruz is the federally mandated ADA complementary paratransit program of the Transit District, providing shared ride, door-to-door demand-response transportation to customers certified as having disabilities that prevent them from independently using the fixed route bus.

METRO began direct operation of ADA paratransit service (METRO ParaCruz) beginning November 1, 2004. This service had been delivered under contract since 1992.

At the January 23<sup>rd</sup>, 2008 METRO Board of Directors meeting Staff was requested to provide additional information on the number of ParaCruz eligibility assessments conducted each year since in-person eligibility assessments started August 2002. In person Eligibility assessments

5-5.1

were initiated while METRO's ADA Paratransit was a service contracted with Community Bridges. METRO ParaCruz has been administered in-house since October 2004. Attachment G illustrates the differences of the number of assessments conducted each year, separated into each category of Eligibility determinations.

There has been discussion regarding ParaCruz on-time performance. It was noted that most statistical data continues to show improvement, the reported percentage of pick ups performed within the "ready window" has remained relatively consistent, hovering at roughly 90%. Staff was requested to provide a break down reflecting pick-ups beyond the "ready window".

The table below displays the percentage of pick-ups within the "ready window" and a breakdown in 5-minute increments for pick-ups beyond the "ready window".

	November 2007	November 2008
Total pick ups	7237	7137
<b>Percent in "ready window"</b>	<b>92.48%</b>	<b>96.46%</b>
1 to 5 minutes late	3.11%	1.56%
6 to 10 minutes late	1.66%	.92%
11 to 15 minutes late	1.16%	.48%
16 to 20 minutes late	.55%	.27%
21 to 25 minutes late	.39%	.13%
26 to 30 minutes late	.21%	.08%
31 to 35 minutes late	.07%	.06%
36 to 40 minutes late	.10%	.04%
41 or more minutes late (excessively late/missed trips)	.06%	.01%
Total beyond "ready window"	<b>7.52%</b>	<b>3.54%</b>

During the month of November 2008, ParaCruz received five (5) Customer Service complaints and one (1) compliment. Three (3) of the complaints were valid, and two (2) were not valid.

As a way to monitor performance for selected items, two new columns have been added to the Comparative Operating Statistics Table. They are titled, respectively, 'Performance ' and 'Performance Goals'. These new columns identify what the average is for the unpredictable factors, and performance goals that we have established for reported items where performance is a critical indicator to ParaCruz' efficiency.

#### IV. FINANCIAL CONSIDERATIONS

NONE

#### V. ATTACHMENTS

**Attachment A:** Comparative Operating Statistics Table for November 2008.

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- Attachment B:** Number of Rides Comparison Chart
- Attachment C:** Shared vs. Total Rides Chart
- Attachment D:** Mileage Comparison Chart
- Attachment E:** Year To Date Mileage Chart
- Attachment F:** Daily Drivers vs. Subcontractor Chart
- Attachment G:** Eligibility Charts

# Attachment **A**

Board of Directors  
Board Meeting February 27<sup>th</sup>, 2008

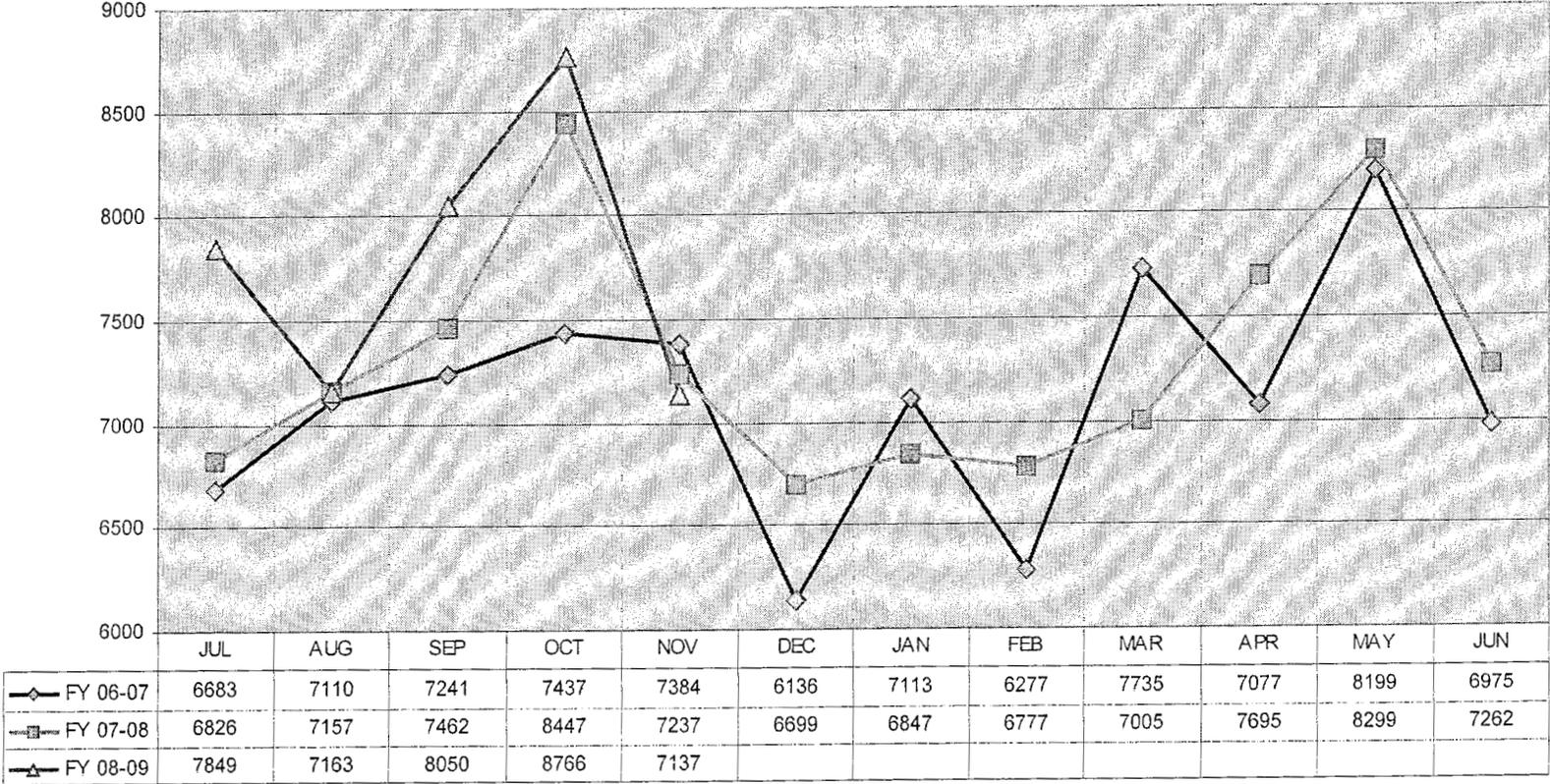
## Comparative Operating Statistics This Fiscal Year, Last Fiscal Year through November.

	Nov 07	Nov 08	Fiscal 07-08	Fiscal 08-09	Performance Averages	Performance Goals
Requested	8165	8047	39,792	41,673	8072	
Performed	7237	7137	37,129	38,965	7462	
Cancels	19.34%	21.37%	15.94%	17.39%	17.70%	
No Shows	2.89%	2.51%	2.41%	2.97%	2.76%	Less than 3%
Total miles	48,186	48,596	243,211	261,528	49,212	
Av trip miles	5.17	4.95	5.15	5.08	4.99	
Within ready window	92.48%	96.46%	92.48%	93.69%	94.34%	92.00% or better
Excessively late/missed trips	4	1	16	20	2.83	Zero (0)
Call center volume	6042	5902	30,471	26,960	6301	
Call average seconds to answer	30	30	30	36	30.08 seconds	Less than 2 minutes
Hold times less than 2 minutes	97%	97%	96%	96%	96%	Greater than 90%
Distinct riders	801	792	1,338	1,345	785	
Most frequent rider	58 rides	35 rides	243 rides	201 rides	53 rides	
Shared rides	66.5%	72.7%	65.0%	66.6%	68.5%	Greater than 60%
Passengers per rev hour	2.51	1.97	2.46	2.12	2.19	Greater than 1.6 passengers/hour
Rides by supplemental providers	10.43%	12.76%	19.96%	10.16%	10.26%	No more than 25%
Vendor cost per ride	\$24.36	\$25.35	\$22.99	\$23.20	\$22.51	
ParaCruz driver cost per ride (estimated)	\$23.14	\$28.25	\$23.96	\$24.57	\$25.19	
Rides < 10 miles	71.98%	71.19%	79.72%	70.50%	71.83%	
Rides > 10	28.02	28.81%	20.28%	29.50%	28.17%	

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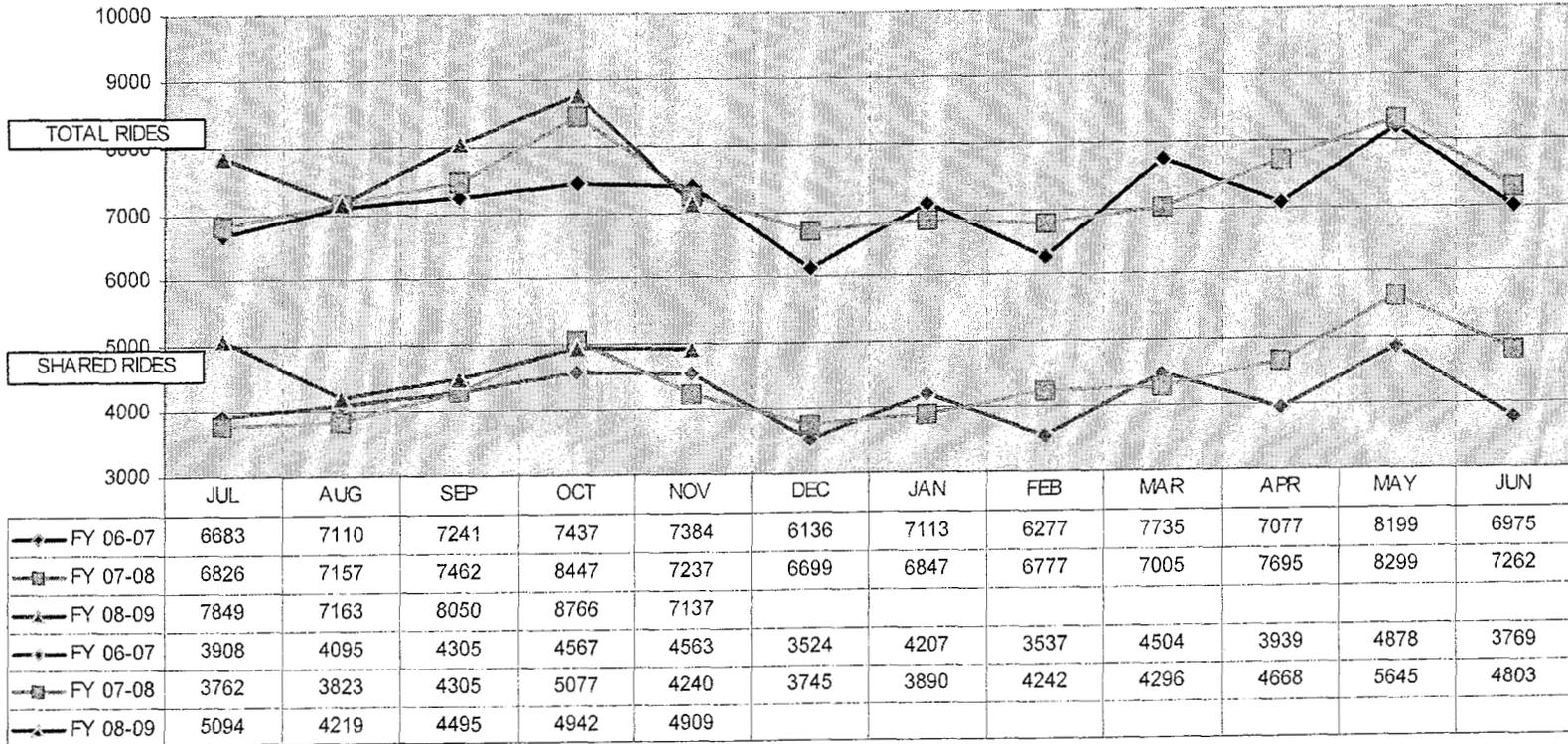
5-5.61

NUMBER OF RIDES COMPARISON CHART



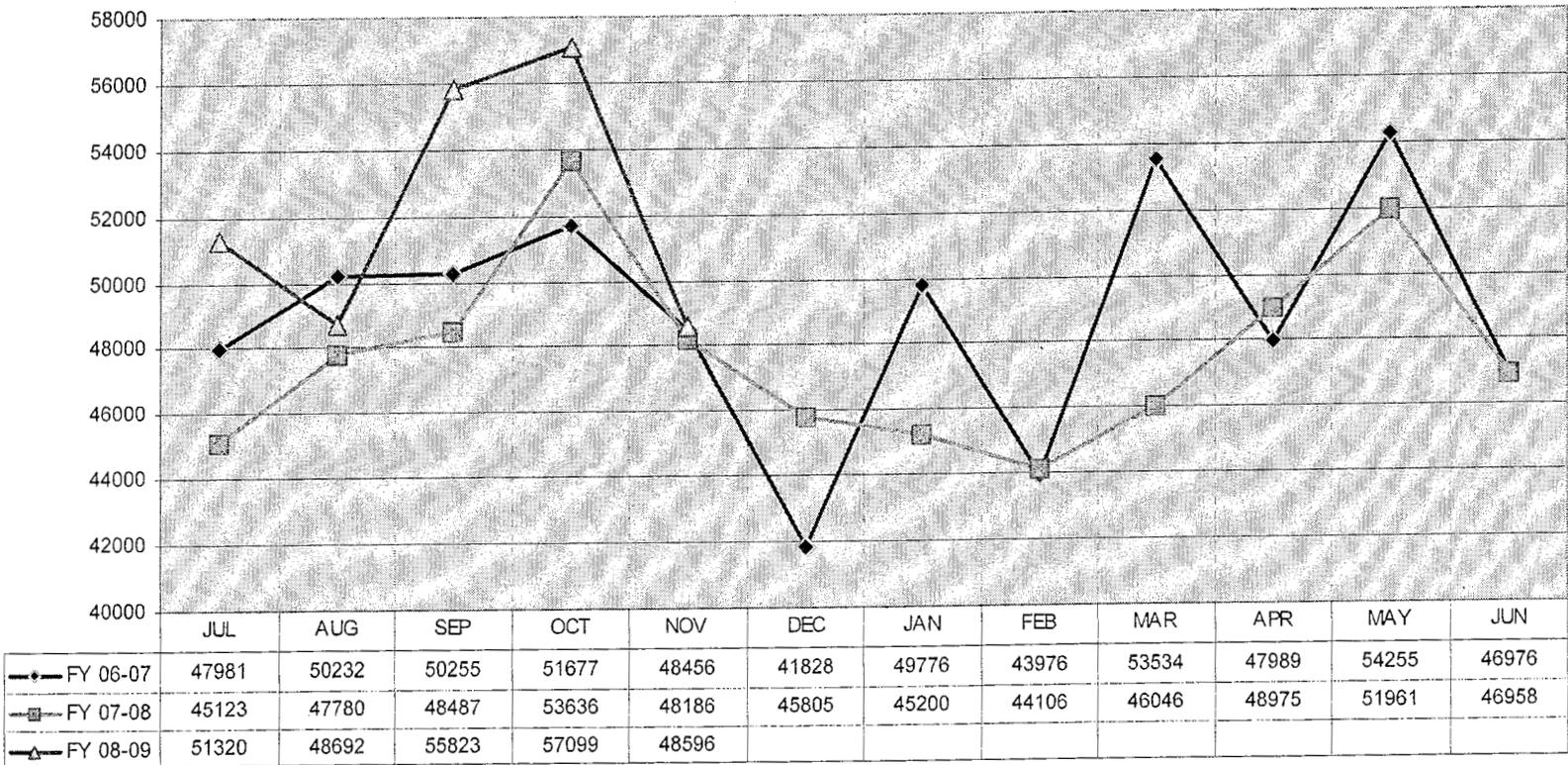
Attachment B

TOTAL vs. SHARED RIDES



5-5.21

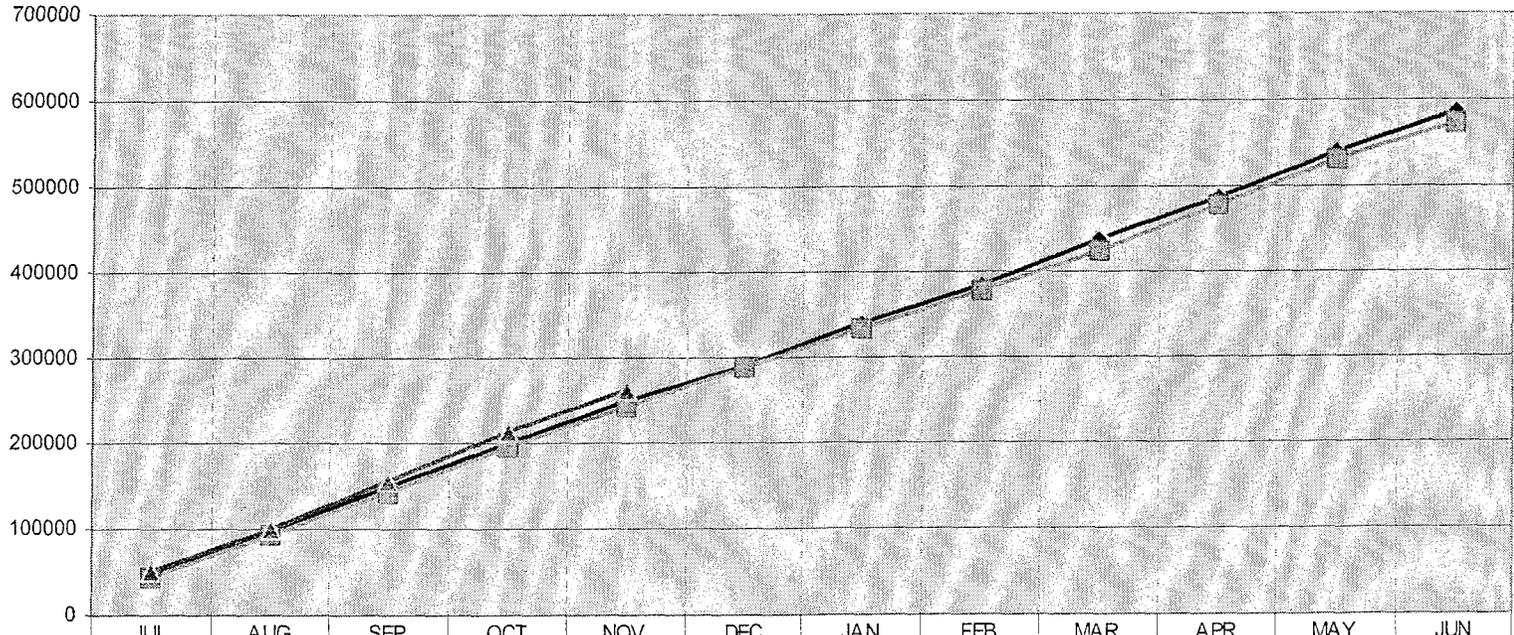
MILEAGE COMPARISON



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Attachment D

YEAR TO DATE MILEAGE COMPARISON



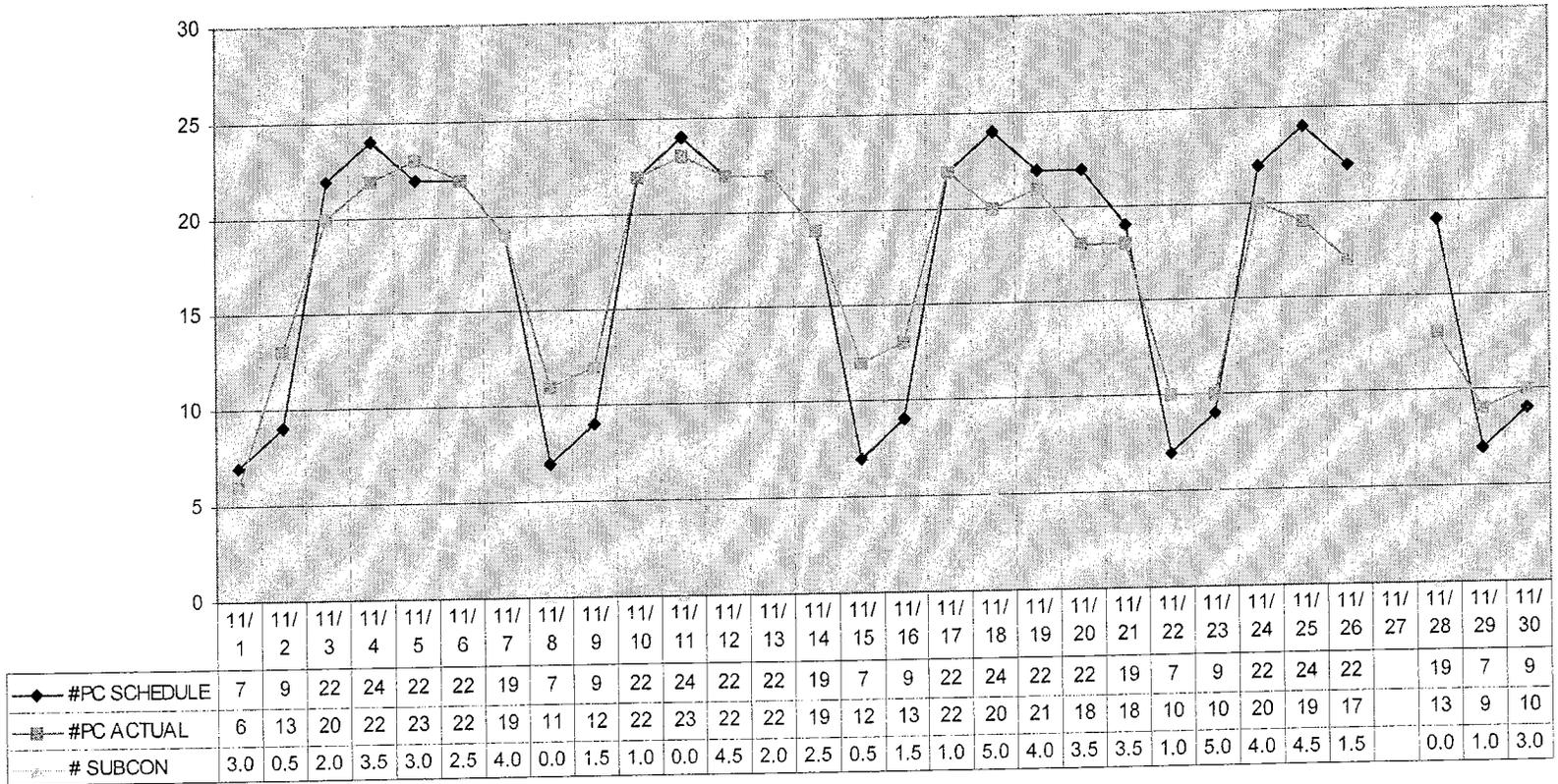
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
FY 06-07	47981	98213	148468	200145	248601	290429	340205	384181	437715	485704	539959	586935
FY 07-08	45123	92903	141390	195026	243212	289017	334217	378323	424761	478831	530792	572750
FY 08-09	51320	100012	155835	212931	261528							

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Attachment E

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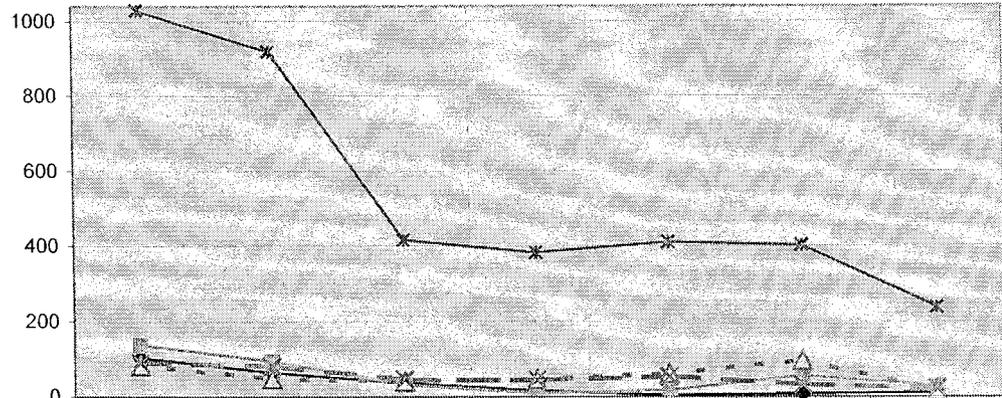
DAILY DRIVER vs. SUBCONTRACTOR



Attachment E

Board of Directors  
Board Meeting February 27<sup>th</sup>, 2009

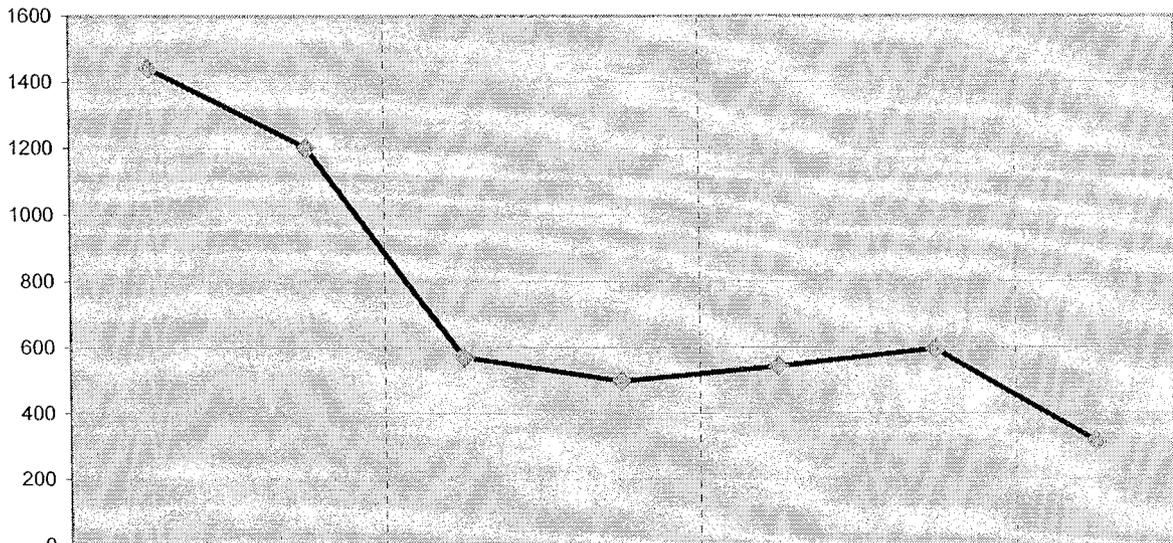
ELIGIBILITY COMPARISON CHART



	FY02-03	FY03-04	FY04-05	FY05-06	FY06-07	FY07-08	FY08-09
Denied	104	64	36	16	3	7	11
Restricted Conditional	137	94	32	9	16	57	29
Restricted Trip by Trip	83	47	41	46	61	97	15
Temporary	90	80	45	44	53	32	21
Unrestricted	1029	918	417	383	410	403	239

\*\* Data for FY08-09 is for six months only

TOTAL ELIGIBILITY DETERMINATIONS



	FY02-03	FY03-04	FY04-05	FY05-06	FY06-07	FY07-08	FY08-09
Total	1443	1203	571	498	543	596	315

\*\* Data for FY08-09 is for six months only

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# HIGHWAY 17 EXPRESS OPERATING STATISTICS SUMMARY

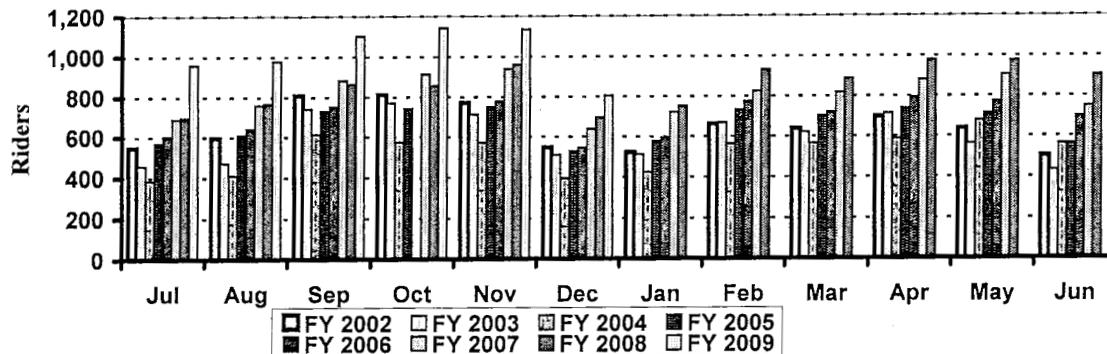
FISCAL YEAR 2009

MONTHLY	Jul-2008	Aug-2008	Sep-2008	Oct-2008	Nov-2008	Dec-2008	Jan-2009	Feb-2009	Mar-2009	Apr-2009	May-2009	Jun-2009
<b>Total Ridership</b>	25,909	26,183	27,827	31,546	27,852	21,008						
Avg. Weekday Ridership	959	977	1,101	1,142	1,133	805						
Avg. Saturday Ridership	540	566	550	625	567	422						
Avg. Sunday Ridership	531	565	500	697	660	324						
<b>Total Service Days</b>	31	31	30	31	30	31						
Number of Weekdays	22	21	21	23	18	22						
Number of Saturdays	4	5	4	4	5	4						
Numbers of Sundays	5	5	5	4	7	5						
<b>Revenue Hours</b>	1,485	1,451	1,468	1,633	1,456	1,592						

QUARTERLY	Q1			Q2			Q3			Q4		
<b>Total Ridership</b>	79,919			80,406								
Avg. Weekday Ridership	1,012			1,022								
Avg. Saturday Ridership	553			540								
Avg. Sunday Ridership	532			564								
<b>Revenue Hours</b>	4,403			4,681								

FYTD	Jul-2008	Aug-2008	Sep-2008	Oct-2008	Nov-2008	Dec-2008	Jan-2009	Feb-2009	Mar-2009	Apr-2009	May-2009	Jun-2009
<b>Total Ridership</b>	25,909	52,092	79,919	111,465	139,317	160,325						
Avg. Weekday Ridership	959	968	1,012	1,046	1,061	1,017						
Avg. Saturday Ridership	540	554	553	570	569	547						
Avg. Sunday Ridership	531	548	532	567	592	549						
<b>Revenue Hours</b>	1,485	2,936	4,403	6,037	7,492	9,084						

**HIGHWAY 17 EXPRESS**  
Average Weekday Ridership History



**FYTD COMPARISON**  
2009 vs. 2008

	FY 2009	FY 2008	Percent Change
	Jul '08 to Dec '08	Jul '07 to Dec '07	
# of Weekdays	127	126	0.8%
Total Ridership	160,325	124,916	28.3%
Avg. Wkday Ridership	1,017	805	26.3%
Avg Sat Ridership	547	402	35.9%
Avg Sun Ridership	549	408	34.6%
Revenue Hours	9,084	8,604	5.6%
Riders Per Rev. Hour	17.65	14.52	21.6%

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**Santa Cruz METRO  
November 2008 Ridership Report**

ROUTE	Miles	Hours	Revenue	UC		Cabrillo	Full Fare	Cash S/D Tickets	S/D Riders	S/D Day Pass	S/D Day Pass	Passes/Free Rides	Pacific Shores	Total Ridership	Passengers Per Mile	Passengers Per Hour	W/C	Bike
				Student	Faculty													
10	4,847.09	405.66	\$1,649.66	27,201	1,538	164	946	30	45	11	2	900	4	30,842	6.36	76.03	17	988
13	1,868.64	159.80	\$333.68	12,848	578	107	184	11	4	2	3	252	4	13,994	7.49	87.57	6	405
15	6,489.66	544.70	\$1,755.33	42,673	1,800	365	973	46	47	3	6	852	6	46,772	7.21	85.87	12	1,243
16	14,161.28	1,157.63	\$5,695.77	88,117	2,981	661	3,232	124	110	32	11	2,195	8	97,472	6.88	84.20	33	2,645
19	5,392.66	402.70	\$1,616.86	24,654	995	203	909	33	40	5	19	895	3	27,756	5.15	68.92	14	857
3	2,045.16	148.19	\$1,153.85	333	166	294	524	60	134	20	39	1,342	80	2,993	1.46	20.20	16	58
4	1,273.59	131.99	\$1,090.41	229	60	165	430	289	226	14	30	3,353	9	4,807	3.77	36.42	18	77
7	937.80	84.01	\$181.58	85	49	72	54	27	22	8	18	602	0	937	1.00	11.15	3	14
9	390.28	20.70	\$251.09	33	3	7	145	17	10	2	0	168	0	386	0.99	18.64	1	1
12A	223.79	16.15	\$41.30	981	35	6	25	6	4	0	0	12	0	1,070	4.78	66.23	0	37
20	5,845.57	389.52	\$0.00	19,653	721	318	995	72	83	12	6	1,392	114	23,368	4.00	59.99	10	687
27x	1,194.76	102.00	\$129.35	4,715	257	19	76	4	3	0	0	46	0	5,121	4.29	50.21	1	213
31	1,918.48	98.69	\$1,034.11	74	64	165	591	49	22	10	1	662	0	1,638	0.85	16.60	7	118
32	643.36	38.11	\$368.53	155	23	21	219	11	4	0	0	337	0	771	1.20	20.22	1	19
33	398.88	18.40	\$201.51	1	6	1	121	31	2	0	0	233	0	395	0.99	21.47	0	8
34	223.36	14.13	\$168.33	0	0	3	91	2	1	0	0	180	0	278	1.24	19.65	1	0
35	36,565.61	1,830.61	\$23,220.11	1,250	328	2,268	12,698	536	977	255	128	19,147	1	37,587	1.03	20.53	39	1,626
40	2,326.28	91.76	\$1,182.49	54	7	36	606	9	38	31	14	599	1	1,396	0.60	15.21	0	42
41	2,740.37	113.66	\$1,096.85	245	100	129	640	23	22	11	4	458	28	1,660	0.61	14.60	0	226
42	3,275.13	121.76	\$689.19	164	16	60	398	12	29	0	3	307	7	997	0.30	8.19	0	66
53	1,002.24	70.79	\$344.92	7	18	51	170	4	52	1	8	480	2	793	0.79	11.20	37	20
54	2,282.97	131.99	\$508.07	10	5	187	262	17	52	4	3	531	0	1,072	0.47	8.12	7	36
55	2,427.48	165.01	\$1,119.05	21	13	1,797	571	37	105	12	10	1,555	6	4,126	1.70	25.01	94	110
56	1,895.22	83.70	\$509.72	4	6	408	240	17	48	12	6	587	0	1,327	0.70	15.86	14	45
66	6,285.54	539.12	\$8,796.24	1,958	381	830	4,668	305	603	118	66	6,914	9	15,851	2.52	29.40	101	521
68	4,797.14	391.23	\$5,040.21	1,703	369	435	2,646	191	347	77	50	4,460	7	10,286	2.14	26.29	54	312
68N	1,790.75	128.56	\$0.00	606	105	118	664	18	42	0	0	780	0	2,333	1.30	18.15	6	148
69	3,038.41	273.92	\$4,395.79	1,546	354	500	2,385	195	308	32	37	4,077	16	9,451	3.11	34.50	58	329
69A	13,994.72	749.44	\$16,005.14	1,419	596	909	8,794	662	1,024	151	105	8,509	14	22,184	1.59	29.60	157	722
69N	1,493.91	119.99	\$820.10	383	60	346	486	22	37	0	0	712	0	2,045	1.37	17.05	6	116
69W	13,527.92	750.74	\$15,856.24	1,851	430	4,093	8,897	542	877	114	93	9,472	17	26,387	1.95	35.15	140	953
70	2,446.39	201.16	\$2,412.71	289	118	3,668	1,347	114	170	13	7	2,313	23	8,062	3.30	40.08	30	336
71	46,350.68	2,647.62	\$46,107.47	2,880	1,086	12,391	25,426	1,937	3,145	313	237	24,559	86	72,061	1.55	27.22	341	3,060
72	4,734.07	228.91	\$3,115.91	3	25	238	1,640	105	369	20	31	1,328	0	3,759	0.79	16.42	17	66
74	2,895.28	169.51	\$3,053.75	6	23	91	1,658	84	292	19	35	1,045	0	3,253	1.12	19.19	4	33
75	6,378.84	384.25	\$7,434.48	27	38	286	3,989	195	656	78	54	2,518	0	7,841	1.23	20.41	51	156
76	2,312.73	121.94	\$0.00	0	0	0	0	0	0	0	0	0	0	-	0.00	0.00	0	0
79	1,412.33	82.49	\$1,374.46	3	38	173	581	64	253	19	49	715	0	1,895	1.34	22.97	72	32
88	399.24	40.00	\$18.50	2	0	1	5	3,956	0	0	0	1,422	0	5,386	13.49	134.65	1	1
91x	5,079.24	218.38	\$2,446.80	157	98	1,178	1,265	187	136	55	23	1,679	3	4,781	0.94	21.89	8	246
UC Supp.	285.67	17.12	\$29.35	2,991	155	6	17	1	0	0	0	27	3	3,200	11.20	186.92	0	54
Night Owl	1,158.95	103.68	\$0.00	1,401	17	14	27	1	0	0	0	8	1	1,469	1.27	14.17	0	33
<b>TOTAL</b>	<b>218,751.43</b>	<b>13,509.72</b>	<b>\$161,248.92</b>	<b>240,732</b>	<b>13,663</b>	<b>32,785</b>	<b>89,597</b>	<b>10,048</b>	<b>10,341</b>	<b>1,458</b>	<b>1,100</b>	<b>107,624</b>	<b>455</b>	<b>507,803</b>	<b>2.32</b>	<b>37.59</b>	<b>1,377</b>	<b>16,660</b>
ROUTE	VTA/SC		REVENUE	ECO	Full	S/D	17	Passes/	RIDERSHIP		Passengers	Passengers	W/C	Bike				
17	45,114.31	1,425.98	\$57,611.77	45	86	257	11,639	1,183	1,186	117	11,023	25,536	0.57	17.91	58	1,203		

<b>November Ridership</b>	<b>533,339</b>
<b>November Revenue</b>	<b>\$218,861</b>

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**Santa Cruz METRO  
November 2007 Ridership Report**

ROUTE	Miles	Hours	Passes/ Free Rides	UC Student	UC Staff Faculty	Full Fare	Day Pass	Cash S/D Riders	S/D Day Pass	Cabrillo	Total Ridership	Passengers Per Mile	Passengers Per Hour	W/C	Bike
10	4,942.47	413.75	1,159	29,612	1,791	932	16	90	3	158	33,798	6.84	81.69	38	888
13	2,088.48	178.60	348	12,142	704	226	1	6	2	80	13,530	6.48	75.76	4	378
15	7,324.99	626.40	1,164	41,381	2,049	973	9	46	6	285	45,959	6.27	73.37	16	1,274
16	15,127.16	1,257.61	2,647	86,117	3,318	3,533	27	107	15	522	96,402	6.37	76.65	27	2,590
19	5,747.36	424.87	1,080	23,785	1,270	934	7	92	19	153	27,386	4.76	64.46	7	783
3	2,272.40	164.66	1,463	409	164	605	30	139	25	189	3,203	1.41	19.45	-	1
4	1,682.30	146.66	3,077	205	63	352	11	230	24	124	4,329	2.57	29.52	42	115
7	1,042.00	93.34	567	42	43	43	3	38	13	55	844	0.81	9.04	5	1
9	433.64	23.00	165	38	27	71	1	20	-	15	341	0.79	14.83	-	8
12A	261.52	18.05	17	768	123	21	-	4	1	9	947	3.62	52.47	-	37
20	5,920.14	394.53	1,345	20,989	959	1,137	22	109	6	335	25,137	4.25	63.71	13	609
27	1,325.61	113.33	46	4,498	220	71	-	5	-	16	4,862	3.67	42.90	1	164
31	2,131.64	109.66	1,069	241	83	673	21	28	2	120	2,283	1.07	20.82	14	89
32	714.84	42.34	251	9	6	249	-	13	-	23	579	0.81	13.68	1	15
33	423.81	19.55	154	1	-	99	-	2	-	6	274	0.65	14.02	-	1
34	237.32	15.01	234	-	-	112	-	-	-	-	349	1.47	23.25	-	4
35	37,102.87	1,858.42	20,398	1,250	518	14,119	258	1,169	148	2,097	40,584	1.09	21.84	54	1,636
40	2,615.70	96.16	885	68	9	734	46	43	19	34	1,858	0.71	19.32	-	54
41	2,938.28	122.00	550	193	71	747	4	26	2	158	1,797	0.61	14.73	-	173
42	3,363.05	121.59	410	148	41	364	-	45	5	83	1,121	0.33	9.22	-	133
53	1,113.60	78.66	431	4	7	245	9	87	11	34	850	0.76	10.81	53	6
54	2,029.23	117.66	419	34	10	200	4	57	2	112	844	0.42	7.17	2	19
55	2,697.20	183.34	1,520	25	54	565	20	165	23	1,337	3,747	1.39	20.44	66	88
56	2,105.80	93.00	482	2	7	217	11	19	-	404	1,160	0.55	12.47	13	30
66	6,336.96	543.66	6,988	1,549	354	5,509	155	620	66	734	16,349	2.58	30.07	177	441
88	4,755.77	396.73	4,753	1,530	292	2,984	84	303	34	398	10,534	2.21	26.55	84	280
68N	1,882.10	128.56	802	435	56	794	-	46	-	116	2,269	1.21	17.65	10	79
69	3,333.51	301.19	4,101	1,562	398	2,899	40	240	32	466	9,919	2.98	32.93	54	312
69A	14,074.32	756.51	9,351	1,228	534	10,076	155	1,172	134	798	24,130	1.71	31.90	227	733
69N	1,659.90	133.32	901	386	112	627	-	30	-	321	2,394	1.44	17.96	14	105
69W	13,681.80	762.40	9,863	1,508	572	9,756	137	1,017	91	3,689	27,186	1.99	35.66	164	897
70	2,734.20	224.83	2,325	301	133	1,417	35	178	16	2,891	7,422	2.71	33.01	38	253
71	47,255.71	2,702.67	24,759	2,621	1,223	27,558	301	3,241	256	10,246	72,274	1.53	26.74	415	2,725
72	5,262.88	254.34	1,350	3	25	1,746	43	256	25	164	3,702	0.70	14.56	28	36
74	3,240.08	188.34	750	7	32	1,606	12	174	17	71	2,759	0.85	14.65	15	11
75	6,366.66	384.25	2,572	21	48	3,709	61	536	83	433	7,667	1.20	19.95	59	74
76	1,893.31	99.75	363	4	10	410	8	75	8	5	902	0.48	9.04	6	17
79	1,569.26	91.66	1,000	4	35	539	30	154	54	230	2,100	1.34	22.91	80	24
88	399.24	40.01	10	2	-	4	-	4	-	3	1,346	3.37	33.64	1	-
91	5,379.86	222.90	1,814	185	118	1,754	33	75	21	982	5,219	0.97	23.41	19	246
UC Supplemental	1,521.45	95.27	47	6,060	245	83	1	6	-	12	6,457	4.24	67.78	-	90
Unknown			225	141	7		-	13	55	28	648			13	21
<b>TOTAL</b>	<b>226,988.40</b>	<b>14,038.58</b>	<b>111,855</b>	<b>239,508</b>	<b>15,731</b>		<b>1,595</b>	<b>10,680</b>	<b>1,218</b>	<b>27,936</b>	<b>515,461</b>			<b>1,760</b>	<b>15,440</b>

ROUTE	Monthly Pass	VTA/SC Day Pass	CalTrain	Full Fare	17 Day Pass	S/D Riders	ECO Pass	METRO RIDERSHIP	Passengers Per Mile	Passengers Per Hour	W/C	Bike			
17	43,792.71	1,415.18	10,496	65	73	10,415	98	1,520	7,640	176	24,115	0.55	17.04	43	1,256

Night Owl	5,941.00
<b>TOTAL</b>	<b>5,941.00</b>

<b>November Ridership</b>	545,517
<b>November Revenue</b>	\$ 232,079.11

5-7.2

BUS OPERATOR LIFT TEST \*PULL-OUT\*

	A	B	C	D	E	F	
VEHICLE CATEGORY	TOTAL BUSES	AVG # DEAD IN GARAGE	AVG # AVAIL. FOR SERVICE	AVG # IN SERVICE	AVG # SPARE BUSES	AVG # LIFTS OPERATING	% LIFTS WORKING ON PULL-OUT BUSES
FLYER/HIGHWAY 17 - 40'	7	0	7	1	6	1	100%
FLYER/LOW FLOOR - 40'	12	2	10	6	4	6	100%
FLYER/LOW FLOOR - 35'	18	3	15	10	5	10	100%
FLYER/HIGH FLOOR - 35'	13	3	10	3	7	3	100%
GILLIG/SAM TRANS - 40'	10	2	8	4	4	4	100%
DIESEL CONVERSION - 35'	15	5	10	9	1	9	100%
DIESEL CONVERSION - 40'	14	3	11	10	1	10	100%
ORION/HIGHWAY 17 - 40'	11	4	7	6	1	6	100%
GOSHEN	1	0	1	1	0	1	0%
TROLLEY	1	0	1	0	1	0	100%
CNG NEW FLYER - 40'	10	2	8	8	0	8	100%

5-7.3

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

## PASSENGER LIFT PROBLEMS

MONTH OF NOVEMBER 2008

BUS #	DATE	DAY	REASON
9834G	3-Nov	Monday	Lift non-operational. Will not deploy. Just makes a clank sound.
9817LF	5-Nov	Wednesday	While deploying ramp, when it gets to a certain point it crashes down. Unlike(?) when stowing it.
2306OR	6-Nov	Thursday	Kneel sometimes does not come back up.
2217CN	7-Nov	Friday	Ramp doesn't deploy properly.
9838G	10-Nov	Monday	Kneel not working.
8100F	13-Nov	Wednesday	Will not work.
2219CN	18-Nov	Tuesday	W/C area flip up seat needs to be fixed - left side of bus - seat is very stiff to raise and doesn't release well.
8103F	18-Nov	Tuesday	Kneel works going down but comes right back up. Does not hold in down position.
2219CN	19-Nov	Wednesday	Flip up w/c area, left side (driver side) will not go up. Fix Please.
2213CN	19-Nov	Wednesday	Broken toggle switch for kneel.
8100F	19-Nov	Wednesday	Ramp doesn't always deploy, when it does it hits the curb. It shudders when deboarding a lift passenger.
9833G	20-Nov	Thursday	Lift is ok on pre-trip, but not with a wheel chair.
2205CG	26-Nov	Wednesday	Warning buzzer not working during kneeling cycle.
2301OR	27-Nov	Thursday	Kneel rises very slowly.

F New Flyer  
G Gillig  
C Champion  
LF Low Floor Flyer  
GM GMC  
CG CNG  
CN SR855 & SR854  
OR Orion/Hwy 17

Note: Lift operating problems that cause delays of less than 30 minutes.

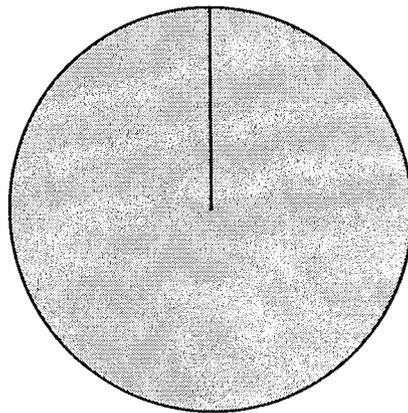
5-7.4

Dropped Service for FY09

	FY07		FY08		FY09	
	Dropped Hours	Dropped Miles	Dropped Hours	Dropped Miles	Dropped Hours	Dropped Miles
July	5.02	96.88	5.53	90.97	81.53	1482.81
August	15.02	276.46	4.93	110.45	1.13	23.95
September	11.30	160.72	9.00	191.05	11.50	194.51
October	37.52	540.19	9.52	122.24	29.75	555.98
November	37.55	477.48	3.32	45.89	11.60	59.92
December	6.08	143.84	18.97	241.87		
January	12.24	188.23	49.20	453.86		
February	13.07	188.23	53.53	717.31		
March	7.13	133.30	22.50	315.63		
April	4.85	43.67	40.75	586.55		
May	16.00	241.42	16.40	246.82		
June	62.19	802.29	52.05	882.35		
<b>TOTAL</b>	<b>227.96</b>	<b>3,292.71</b>	<b>285.70</b>	<b>4,004.99</b>	<b>135.52</b>	<b>2,317.17</b>

Dropped Service Breakdown for November 2008

Road  
Closures/  
driver error/  
dropped  
11.60 hrs



5-7.5

**Santa Cruz METRO  
December 2008 Ridership Report**

ROUTE	Miles	Hours	Revenue	UC Student	UC Staff Faculty	Cabrillo	Full Fare	Tickets	Cash S/D Riders	S/D Day Pass	S/D Day Pass	Passes/ Free Rides	Pacific Shores	Total Ridership	Passengers Per Mile	Passengers Per Hour	W/C	Bike
10	5,350.01	448.41	\$1,054.53	14,492	1,530	175	607	35	36	5	3	867	9	17,759	3.32	39.60	29	586
13	989.28	84.60	\$175.05	5,990	291	46	94	5	6	0	1	106	0	6,539	6.61	77.29	1	196
15	3,436.08	288.70	\$647.25	17,067	771	152	340	18	23	3	4	420	6	18,804	5.47	65.13	4	540
16	12,263.08	991.76	\$3,351.03	40,782	2,556	609	1,837	70	122	32	23	2,215	7	48,253	3.93	48.65	17	1,400
19	4,768.30	359.59	\$950.18	11,971	840	206	464	17	64	11	14	682	3	14,272	2.99	39.69	9	381
3	2,499.64	181.13	\$1,315.08	359	91	284	625	72	136	27	28	1,386	71	3,079	1.23	17.00	19	69
4	1,556.61	161.33	\$1,199.58	165	78	124	437	303	326	14	31	3,572	6	5,056	3.25	31.34	17	114
7	1,146.20	102.67	\$325.87	187	44	51	122	24	73	5	21	641	0	1,168	1.02	11.38	10	13
9	477.00	25.30	\$147.71	17	4	6	71	7	6	4	1	153	0	269	0.56	10.63	0	4
12A	118.48	8.55	\$48.93	589	30	5	24	0	1	1	0	5	0	655	5.53	76.61	0	25
20	5,946.64	396.39	\$1,489.44	8,662	725	214	778	88	109	18	8	1,493	129	12,224	2.06	30.84	10	343
27x	632.52	54.00	\$64.75	2,276	176	12	33	1	1	2	0	28	1	2,530	4.00	46.85	0	107
31	2,344.80	121.33	\$1,019.60	42	67	121	545	53	18	15	1	666	0	1,528	0.65	12.59	1	109
32	786.32	46.57	\$324.53	117	15	12	196	13	6	1	0	305	0	665	0.85	14.28	0	16
33	373.95	17.25	\$252.75	0	4	2	150	11	0	1	0	171	0	339	0.91	19.65	0	3
34	209.40	13.24	\$51.70	0	0	0	28	0	0	0	0	38	0	66	0.32	4.98	1	0
35	38,328.35	1,923.05	\$23,218.05	727	335	1,849	12,445	697	1,117	292	135	19,395	1	36,993	0.97	19.24	31	1,666
40	2,473.88	100.39	\$1,051.65	21	15	23	590	16	30	14	2	490	2	1,203	0.49	11.98	1	29
41	3,169.26	131.66	\$1,112.76	178	64	82	661	21	19	8	1	404	31	1,469	0.46	11.16	3	152
42	3,389.62	125.67	\$801.57	164	20	63	459	9	44	4	2	237	8	1,010	0.30	8.04	0	63
53	1,224.96	86.53	\$373.22	11	14	27	172	13	59	4	7	505	0	812	0.66	9.38	30	35
54	1,932.96	112.33	\$400.30	9	4	127	201	24	42	4	1	486	0	898	0.46	7.99	15	21
55	2,966.92	201.67	\$1,245.51	23	12	1,178	589	48	136	19	20	1,459	3	3,487	1.18	17.29	59	98
56	2,316.38	102.30	\$455.71	4	4	258	210	16	68	6	7	447	1	1,021	0.44	9.98	32	36
66	6,546.55	565.37	\$8,884.40	939	349	699	4,698	298	708	115	45	7,192	13	15,056	2.30	26.63	130	436
68	5,057.72	414.01	\$5,358.78	877	360	348	2,832	214	404	66	39	4,620	4	9,764	1.93	23.58	69	272
68N	1,848.50	132.99	\$1,184.99	246	64	116	689	16	31	1	1	792	0	1,956	1.06	14.71	10	102
69	3,641.80	329.44	\$5,189.05	677	310	402	2,835	232	397	33	40	4,448	12	9,386	2.58	28.49	61	312
69A	14,611.79	787.23	\$16,702.53	750	439	830	9,244	837	1,175	114	132	9,491	19	23,031	1.58	29.26	174	840
69N	1,825.89	146.65	\$1,135.89	197	56	239	673	15	35	0	0	838	0	2,053	1.12	14.00	7	117
69W	14,254.40	796.34	\$16,481.39	874	434	330	9,238	605	940	127	83	9,891	32	22,554	1.58	28.32	119	912
70	2,158.58	177.49	\$1,950.68	157	84	2,304	1,053	112	122	18	17	1,859	15	5,741	2.66	32.35	24	227
71	49,511.57	2,832.64	\$44,304.77	1,801	1,030	9,203	24,249	1,980	2,836	310	224	24,572	101	66,306	1.34	23.41	324	3,140
72	5,786.09	279.77	\$3,273.16	15	17	219	1,750	96	293	40	22	1,406	1	3,859	0.67	13.79	15	72
74	3,538.68	207.17	\$2,812.40	6	32	78	1,504	120	226	23	33	1,193	0	3,215	0.91	15.52	8	41
75	6,598.80	397.50	\$6,416.85	17	38	185	3,343	174	577	96	56	2,199	0	6,685	1.01	16.82	42	162
76	1,681.98	88.66	\$654.92	4	3	3	340	24	67	6	4	298	0	749	0.45	8.45	0	0
79	1,726.19	100.83	\$1,519.05	2	19	97	662	69	261	23	42	825	0	2,000	1.16	19.84	49	21
88	798.48	80.01	\$18.50	2	0	1	5	3,956	0	0	0	1,422	0	5,386	6.75	67.32	1	1
91x	6,102.32	262.46	\$2,465.37	100	83	859	1,215	224	160	69	20	1,460	2	4,192	0.69	15.97	9	193
UC Supp.	736.94	46.11	\$0.00	2,991	155	6	17	1	0	0	0	27	3	3,200	4.34	69.40	0	54
Night Owl	560.83	49.80	\$0.00	5	5	5	5	5	5	5	5	5	5	50	0.09	1.00	0	33
<b>TOTAL</b>	<b>225,687.76</b>	<b>13,778.89</b>	<b>\$159,429.48</b>	<b>113,513</b>	<b>11,168</b>	<b>21,550</b>	<b>86,030</b>	<b>10,539</b>	<b>10,679</b>	<b>1,536</b>	<b>1,073</b>	<b>108,709</b>	<b>485</b>	<b>365,282</b>	<b>1.62</b>	<b>26.51</b>	<b>1,331</b>	<b>12,941</b>
ROUTE	REVENUE	VTA/SC Day Pass	ECO CalTrain	Full Fare	Tickets	S/D Riders	S/D Day Pass	Passes/ Free Rides	RIDERSHIP	Passengers Per Mile	Passengers Per Hour	W/C	Bike					
17	45,114.31	1,425.98	\$45,849.17	66	83	224	9,074	1,172	1,279	145	8,889		20,932	0.46	14.68	57	944	

**December Ridership** 386,214  
**December Revenue** \$205,279

5-7.6

**Santa Cruz METRO  
December 2007 Ridership Report**

ROUTE	Miles	Hours	Passes/ Free Rides	UC Student	UC Staff Faculty	Full Fare	Day Pass	Cash S/D Riders	S/D Day Pass	Cabrillo	Total Ridership	Passengers Per Mile	Passengers Per Hour	W/C	Bike
10	5,037.85	421.58	958	13,784	1,517	757	9	52	18	134	17,274	3.43	40.97	17	460
13	989.28	84.60	181	4,536	311	89	2	4	4	18	5,149	5.20	60.86	-	141
15	3,469.08	296.30	536	16,994	897	415	4	15	1	131	19,019	5.48	64.19	6	523
16	12,633.64	1,034.05	2,732	40,721	2,817	2,332	29	117	16	434	49,108	3.89	47.49	17	1,419
19	4,921.62	367.71	1,037	10,746	849	538	12	60	8	115	13,406	2.72	38.46	4	378
3	2,272.40	164.66	1,195	263	113	614	29	122	16	166	2,657	1.17	16.14	16	57
4	1,521.98	146.66	2,807	99	55	388	12	227	33	80	3,989	2.62	27.20	62	105
7	1,042.00	93.34	540	67	28	112	6	58	12	96	967	0.93	10.36	5	14
9	433.64	23.00	130	18	21	55	2	20	1	10	265	0.61	11.52	1	13
12A	123.28	8.55	2	332	41	16	1	1	-	3	399	3.24	46.67	-	16
20	5,917.26	394.37	1,186	9,174	670	875	16	99	5	241	12,454	2.10	31.58	7	384
27	632.52	54.00	29	1,745	125	16	-	1	-	4	1,923	3.04	35.61	-	76
31	2,131.64	109.66	798	268	99	609	10	26	1	80	1,944	0.91	17.73	11	75
32	714.84	42.34	241	9	4	187	1	6	-	18	495	0.69	11.69	-	14
33	349.02	16.10	108	-	-	71	-	1	-	4	201	0.58	12.48	-	2
34	195.44	12.36	167	-	-	101	-	-	-	1	271	1.39	21.93	-	5
35	37,777.05	1,894.36	18,594	758	411	13,035	280	1,082	157	1,336	36,189	0.96	19.10	39	1,455
40	2,536.48	98.99	735	24	9	643	44	49	12	26	1,567	0.62	15.83	-	47
41	2,971.35	123.33	439	133	69	599	6	22	2	92	1,403	0.47	11.38	-	116
42	3,424.70	125.84	383	112	36	388	1	52	3	68	1,064	0.31	8.46	1	94
53	1,113.60	78.66	479	1	8	239	7	54	7	35	857	0.77	10.89	52	22
54	2,186.70	126.66	354	17	13	278	8	42	4	84	811	0.37	6.40	5	21
55	2,697.20	183.34	1,176	17	19	585	19	111	16	971	2,943	1.09	16.05	60	45
56	2,105.80	93.00	472	9	7	215	6	31	2	253	1,009	0.48	10.85	10	11
66	6,530.78	560.84	6,538	841	365	5,901	121	700	55	613	15,514	2.38	27.66	115	392
68	4,961.12	408.51	4,514	850	306	3,349	92	332	30	319	9,966	2.01	24.40	89	244
68N	1,890.30	132.99	738	250	47	877	-	50	-	102	2,088	1.10	15.70	13	66
69	3,346.70	302.17	3,776	669	303	2,877	41	290	32	375	8,555	2.56	28.31	39	254
69A	14,532.19	780.16	8,813	740	505	10,012	153	1,002	122	619	22,631	1.56	29.01	218	594
69N	1,659.90	133.32	823	212	74	777	-	59	-	252	2,216	1.34	16.62	15	91
69W	14,100.52	784.67	9,045	918	449	9,887	143	948	78	2,541	24,638	1.75	31.40	157	826
70	2,158.58	177.50	1,797	137	74	1,127	25	139	22	1,912	5,344	2.48	30.11	28	186
71	48,570.81	2,777.17	22,302	1,555	952	24,344	291	2,777	219	7,027	61,356	1.26	22.09	404	2,441
72	5,261.20	254.34	1,312	6	29	1,238	39	220	17	133	3,072	0.58	12.08	10	26
74	3,240.08	188.34	810	-	33	1,353	14	158	17	68	2,518	0.78	13.37	19	9
75	6,586.20	397.50	2,342	27	29	2,878	59	392	53	221	6,215	0.94	15.64	38	85
76	2,102.96	110.83	382	1	11	372	13	43	14	7	875	0.42	7.89	7	14
79	1,569.26	91.66	1,033	7	51	602	25	163	43	126	2,118	1.35	23.11	52	14
88	798.48	80.01	346	5	1	5	-	1	-	2	4,232	5.30	52.89	-	3
91	5,398.60	223.67	1,501	132	111	1,409	51	82	18	625	4,139	0.77	18.50	3	232
UC Supplemental	722.05	45.21	16	1,865	93	28	-	3	-	3	2,008	2.78	44.41	-	34
Unknown			128	7	4	-	-	2	1	-	217			-	7
<b>TOTAL</b>	<b>220,628.10</b>	<b>13,442.35</b>	<b>101,495</b>	<b>108,049</b>	<b>11,356</b>	<b>90,193</b>	<b>1,571</b>	<b>9,613</b>	<b>1,037</b>	<b>19,345</b>	<b>353,066</b>			<b>1,520</b>	<b>11,011</b>

ROUTE	Monthly Pass	VTA/SC Day Pass	CalTrain	Full Fare	17 Day Pass	S/D Riders	METRO	ECO Pass	RIDERSHIP	Passengers Per Mile	Passengers Per Hour	W/C	Bike		
17	43,782.62	1,414.68	6,820	42	50	7,972	98	1,283	5,612	102	17,242	0.39	12.19	44	902

Night Owl	2,708.00
TOTAL	2,708.00

December Ridership	373,016
December Revenue	\$ 205,357.65

5-7.7

BUS OPERATOR LIFT TEST \*PULL-OUT\*

	A	B	C	D	E	F	
VEHICLE CATEGORY	TOTAL BUSES	AVG # DEAD IN GARAGE	AVG # AVAIL. FOR SERVICE	AVG # IN SERVICE	AVG # SPARE BUSES	AVG # LIFTS OPERATING	% LIFTS WORKING ON PULL-OUT BUSES
FLYER/HIGHWAY 17 - 40'	7	1	6	2	4	2	100%
FLYER/LOW FLOOR - 40'	12	2	10	7	3	7	100%
FLYER/LOW FLOOR - 35'	18	3	15	9	6	9	100%
FLYER/HIGH FLOOR - 35'	13	4	9	2	7	2	100%
GILLIG/SAM TRANS - 40'	10	1	9	2	7	2	100%
DIESEL CONVERSION - 35'	15	4	11	10	1	10	100%
DIESEL CONVERSION - 40'	14	3	11	10	1	10	100%
ORION/HIGHWAY 17 - 40'	11	4	7	6	1	6	100%
GOSHEN	1	0	1	0	1	0	0%
TROLLEY	1	0	1	0	1	0	100%
CNG NEW FLYER - 40'	10	2	8	7	1	7	100%

5-7.8

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

## PASSENGER LIFT PROBLEMS

MONTH OF DECEMBER 2008

BUS #	DATE	DAY	REASON
9838G	1-Dec	Monday	Kneel-need to turn the coach off and re-start for the kneel to go back up.
9838G	2-Dec	Tuesday	Does not want to raise after kneeling
8103F	2-Dec	Tuesday	Kneel does not stay down
2406PG	3-Dec	Wednesday	Wheelchair tracts dirty
2204CG	5-Dec	Friday	Rt wheelchair floor hook slider stuck
9838G	9-Dec	Tuesday	Kneel not working correctly
9835G	13-Dec	Saturday	When you kneel the bus, it won't raise back up
2224CN	14-Dec	Sunday	Kneel indicator light is "out"
8100F	15-Dec	Monday	Kneel not working, does not raise and stayed lower
8103F	15-Dec	Monday	Kneel will not stay down
2224CN	15-Dec	Monday	Kneel indicator light not working
8103F	26-Dec	Friday	Kneel does not stay down
2205CG	28-Dec	Sunday	Driver seat does not drop at kneel area.
2230CN	29-Dec	Monday	Ramp makes rusty noises and sticks
8103F	19-Dec	Monday	Kneel causes loss of pressure and releases on it's own sometimes
9823LF	29-Dec	Monday	Very slow kneel lowering
9813LF	30-Dec	Tuesday	Lift does not deploy you have to do it manually
9824LF	30-Dec	Tuesday	No audible sound when kneeling or ramp
2311OR	31-Dec	Wednesday	Kneel gets hung-up in the down position and leaks air

F New Flyer  
G Gillig  
C Champion  
LF Low Floor Flyer  
GM GMC  
CG CNG  
CN SR855 & SR854  
OR Orion/Hwy 17

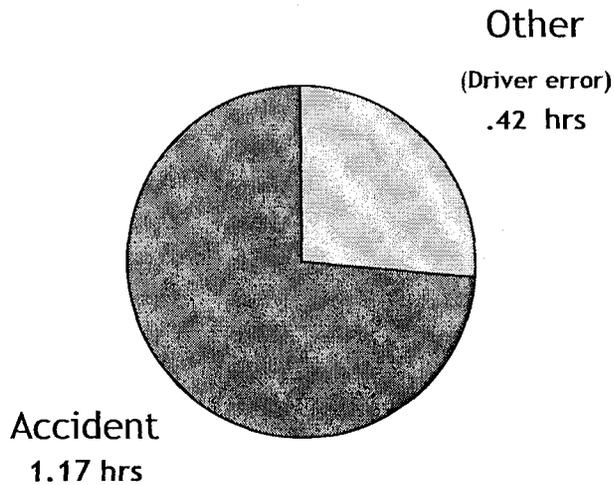
Note: Lift operating problems that cause delays of less than 30 minutes.

5-7.9

**Dropped Service for FY09**

	FY07		FY08		FY09	
	Dropped Hours	Dropped Miles	Dropped Hours	Dropped Miles	Dropped Hours	Dropped Miles
July	5.02	96.88	5.53	90.97	81.53	1482.81
August	15.02	276.46	4.93	110.45	1.13	23.95
September	11.30	160.72	9.00	191.05	11.50	194.51
October	37.52	540.19	9.52	122.24	29.75	555.98
November	37.55	477.48	3.32	45.89	11.60	59.92
December	6.08	143.84	18.97	241.87	1.58	21.32
January	12.24	188.23	49.20	453.86		
February	13.07	188.23	53.53	717.31		
March	7.13	133.30	22.50	315.63		
April	4.85	43.67	40.75	586.55		
May	16.00	241.42	16.40	246.82		
June	62.19	802.29	52.05	882.35		
<b>TOTAL</b>	<b>227.96</b>	<b>3,292.71</b>	<b>285.70</b>	<b>4,004.99</b>	<b>137.10</b>	<b>2,338.48</b>

**Dropped Service Breakdown for December 2008**



**5-7.10**

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009

**TO:** Board of Directors

**FROM:** Angela Aitken, Finance Manager 

**SUBJECT: UNIVERSITY OF CALIFORNIA – SANTA CRUZ  
MONTHLY SERVICE-NOVEMBER 2008 VERSUS NOVEMBER 2007**

## I. RECOMMENDED ACTION

**This report is for information purposes only. No action is required**

## II. SUMMARY OF ISSUES

- There were Seventeen (17) school-term days in 2008 and Nineteen (19) in 2007
- Revenue received from UCSC was \$306,220 versus \$278,625; an increase of 9.9%
- System-wide UCSC ridership increased by 10.7%
  - Total student ridership increased by 11.6%
  - Total Faculty/Staff ridership decreased by 2.9%
- Average Student ridership per school-term day decreased by 3.6%
- Average Faculty/Staff ridership per weekday decreased by 13.6%

## III. DISCUSSION

For the month of November 2008, there were Seventeen (17) school-term days; there were in Nineteen (19) school term days in November 2007.

Due to a collection error with the Fare box Data four (4) days of data were lost and had to be extrapolated. TAPS (UCSC) and METRO staff and management approved the extrapolation method. We have never experienced an error of this kind in the past and steps have been taken to prevent this happening in the future.

UCSC Revenue increased a total of \$27,594; or 9.9%. UCSC ridership for all METRO routes was up 10.7%. This includes an 11.6% increase in student ridership and a 2.9% decrease in Faculty/ Staff ridership.

Please see attached graphs that will depict Total UCSC Student and Faculty/Staff ridership decreasing by 3.6% and decreasing by 13.6% respectively.

5-8.1

**IV. FINANCIAL CONSIDERATIONS.**

Overall UCSC revenue is above FY 08 by 21.4%.

**V. ATTACHMENTS**

- Attachment A: Total UCSC Monthly Revenue**
- Attachment B: Total UCSC Ridership**
- Attachment C: Monthly UCSC Ridership**
- Attachment D: Total UCSC Student Ridership**
- Attachment E: Total UCSC Faculty/Staff Ridership**

Prepared by: Carolyn Hamm and Erich Friedrich

## Total UCSC Monthly Revenue

FY 08 UCSC Revenue									
Date	Regular Student Bill	Regular Staff Bill	Night Owl Bill	Supplemental Bill	27x	TOTAL	Last Year	% Change	\$ Change
Jul-07	\$ 33,024.00	\$ 15,920.00				\$ 48,944.00	\$ 46,696.41	4.8%	\$ 2,247.59
Aug-07	\$ 38,130.53	\$ 17,149.80				\$ 55,280.33	\$ 54,014.10	2.3%	\$ 1,266.23
Sep-07	\$ 101,639.55	\$ 16,690.11	\$ 2,433.63	\$ 4,176.42	\$ 1,501.57	\$ 126,441.28	\$ 170,754.64	-26.0%	\$ (44,313.36)
Oct-07	\$ 331,758.64	\$ 20,061.49	\$ 7,658.98	\$ 8,740.07	\$ 5,020.67	\$ 373,239.85	\$ 314,022.57	18.9%	\$ 59,217.28
Nov-07	\$ 247,552.14	\$ 16,527.66	\$ 6,321.47	\$ 3,205.48	\$ 5,018.58	\$ 278,625.33	\$ 253,496.74	9.9%	\$ 25,128.59
Dec-07	\$ 119,753.81	\$ 12,320.21	\$ 4,731.24	\$ 4,824.85	\$ 2,820.60	\$ 144,450.71	\$ 76,128.86	89.7%	\$ 68,321.85
Jan-08	\$ 256,740.31	\$ 17,162.30	\$ 10,939.02	\$ 2,683.50	\$ 3,671.21	\$ 291,196.34	\$ 277,066.89	5.1%	\$ 14,129.45
Feb-08	\$ 276,028.54	\$ 18,729.40	\$ 13,041.41	\$ 4,439.97	\$ 4,601.84	\$ 316,841.16	\$ 256,817.50	23.4%	\$ 60,023.66
Mar-08	\$ 209,758.69	\$ 17,772.03	\$ 8,550.08	\$ 7,601.47	\$ 4,626.41	\$ 248,308.68	\$ 210,515.59	18.0%	\$ 37,793.09
Apr-08	\$ 297,663.63	\$ 20,042.00	\$ 13,705.06	\$ 7,208.57	\$ 5,651.21	\$ 344,270.47	\$ 272,972.83	26.1%	\$ 71,297.64
May-08	\$ 275,379.83	\$ 19,473.42	\$ 12,965.34	\$ 9,079.77	\$ 6,163.16	\$ 323,061.52	\$ 294,166.80	9.8%	\$ 28,894.72
Jun-08	\$ 127,125.79	\$ 16,138.87	\$ 4,122.59	\$ 4,842.39	\$ 3,027.40	\$ 155,257.04	\$ 148,913.76	4.3%	\$ 6,343.28
<b>FY 2008 Totals</b>	<b>\$ 2,314,555.46</b>	<b>\$ 207,987.30</b>	<b>\$ 84,468.82</b>	<b>\$ 56,802.49</b>	<b>\$ 42,102.65</b>	<b>\$ 2,705,916.71</b>	<b>\$ 2,375,566.69</b>	<b>13.9%</b>	<b>\$330,350.02</b>
FY 09 UCSC Revenue									
Date	Regular Student Bill	Regular Staff Bill	Night Owl Bill	Supplemental Bill	27x	TOTAL	Last Year	% Change	\$ Change
Jul-08	\$ 40,787.95	\$ 14,367.08	-	\$ 9,719.80	-	\$ 64,874.83	\$ 48,944.00	32.5%	\$ 15,930.83
Aug-08	\$ 43,773.78	\$ 16,273.16	-	\$ 10,973.81	-	\$ 71,020.75	\$ 55,280.33	28.5%	\$ 15,740.42
Sep-08	\$ 151,871.29	\$ 18,162.59	\$ 3,763.96	\$ 2,563.82	\$ 2,007.46	\$ 178,369.12	\$ 126,441.28	41.1%	\$ 51,927.84
Oct-08	\$ 408,791.24	\$ 21,030.79	\$ 13,538.41	\$ 1,999.52	\$ 5,435.42	\$ 450,795.38	\$ 373,239.85	20.8%	\$ 77,555.53
Nov-08	\$ 274,825.68	\$ 15,381.16	\$ 10,512.74	\$ 5,500.47	\$ 3,989.36	\$ 306,220.05	\$ 278,625.33	9.9%	\$ 27,594.72
Dec-08						\$ -			\$ -
Jan-09						\$ -			\$ -
Feb-09						\$ -			\$ -
Mar-09						\$ -			\$ -
Apr-09						\$ -			\$ -
May-09						\$ -			\$ -
Jun-09						\$ -			\$ -
	<b>\$ 920,049.94</b>	<b>\$ 85,214.78</b>	<b>\$ 27,815.11</b>	<b>\$ 30,757.42</b>	<b>\$ 11,432.24</b>	<b>\$ 1,071,280.13</b>	<b>\$ 882,530.79</b>	<b>21.4%</b>	<b>\$188,749.34</b>

5-8.a1

Attachment A



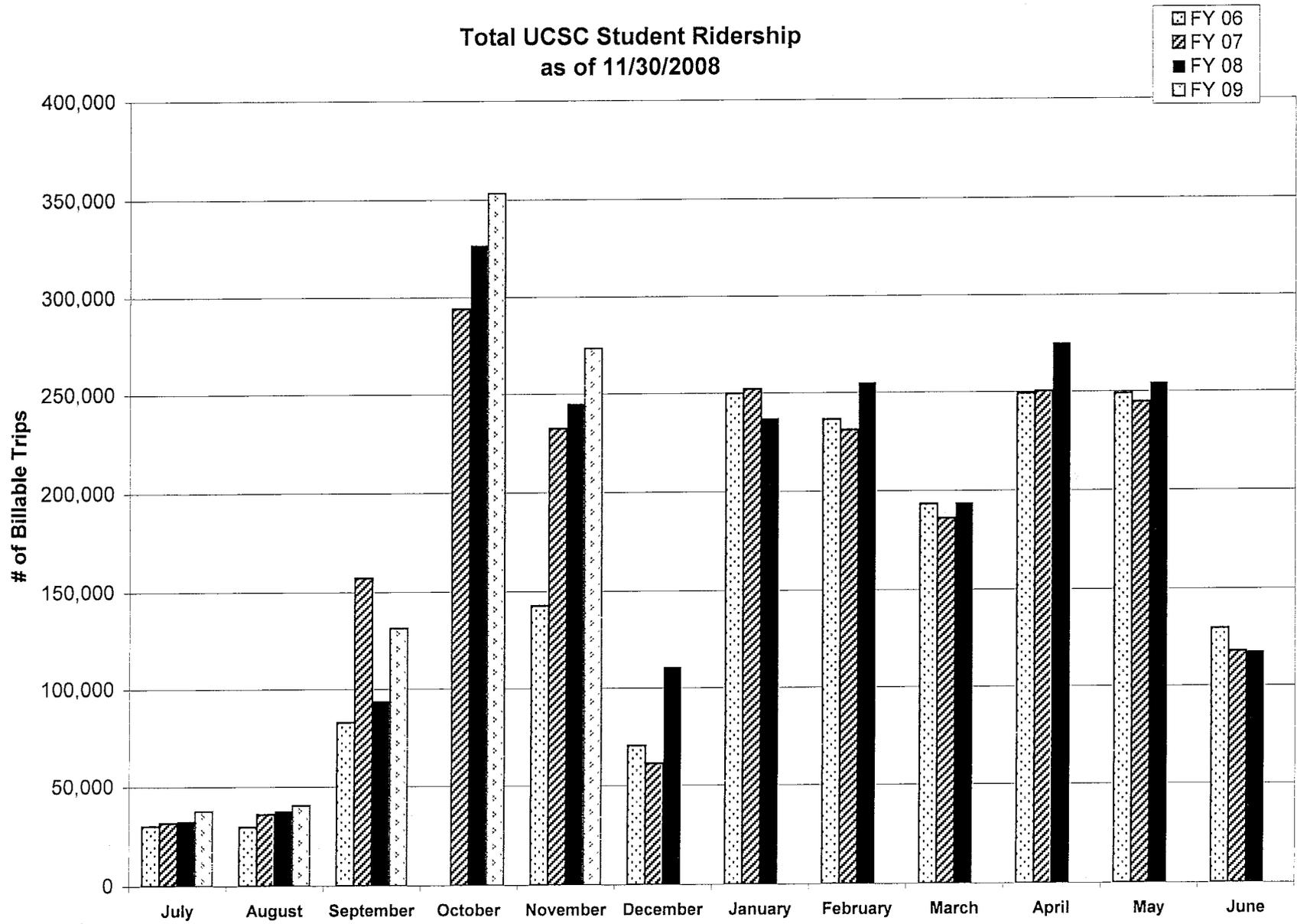
**Monthly UCSC Ridership**

<b>November 2008</b>	<b>Student Ridership</b>			<b>Faculty/ Staff Ridership</b>			<b>Average Student Ridership Per School Term Day</b>			<b>Average Faculty/Staff Ridership Per Weekday</b>		
	<b>FY 09</b>	<b>FY 08</b>	<b>%</b>	<b>FY 09</b>	<b>FY 08</b>	<b>%</b>	<b>FY 09</b>	<b>FY 08</b>	<b>%</b>	<b>FY 09</b>	<b>FY 08</b>	<b>%</b>
<b>Regular Service</b>	257,732	228,580	<i>12.8%</i>	14,719	15,261	<i>-3.6%</i>	10,001.0	10,393.0	<i>-3.8%</i>	578.1	681.8	<i>-15.2%</i>
<b>Supplemental</b>	6,103	6,060	<i>0.7%</i>	334	245	<i>36.3%</i>	359.0	318.9	<i>12.6%</i>	17.6	12.9	<i>36.4%</i>
<b>Night Owl</b>	6,379	5,802	<i>9.9%</i>	55	35	<i>57.1%</i>	92.5	157.2	<i>-41.2%</i>	1.2	0.8	<i>50.0%</i>
<b>27x</b>	4,830	4,498	<i>7.4%</i>	272	220	<i>23.6%</i>	254.2	236.7	<i>7.4%</i>	14.3	11.6	<i>23.3%</i>
<b>TOTAL</b>	<b>275,044</b>	<b>244,940</b>	<i>12.3%</i>	<b>15,380</b>	<b>15,761</b>	<i>-2.4%</i>	<b>10,706.7</b>	<b>11,105.8</b>	<i>-3.6%</i>	<b>611.2</b>	<b>707.1</b>	<i>-13.6%</i>

5-8.c1

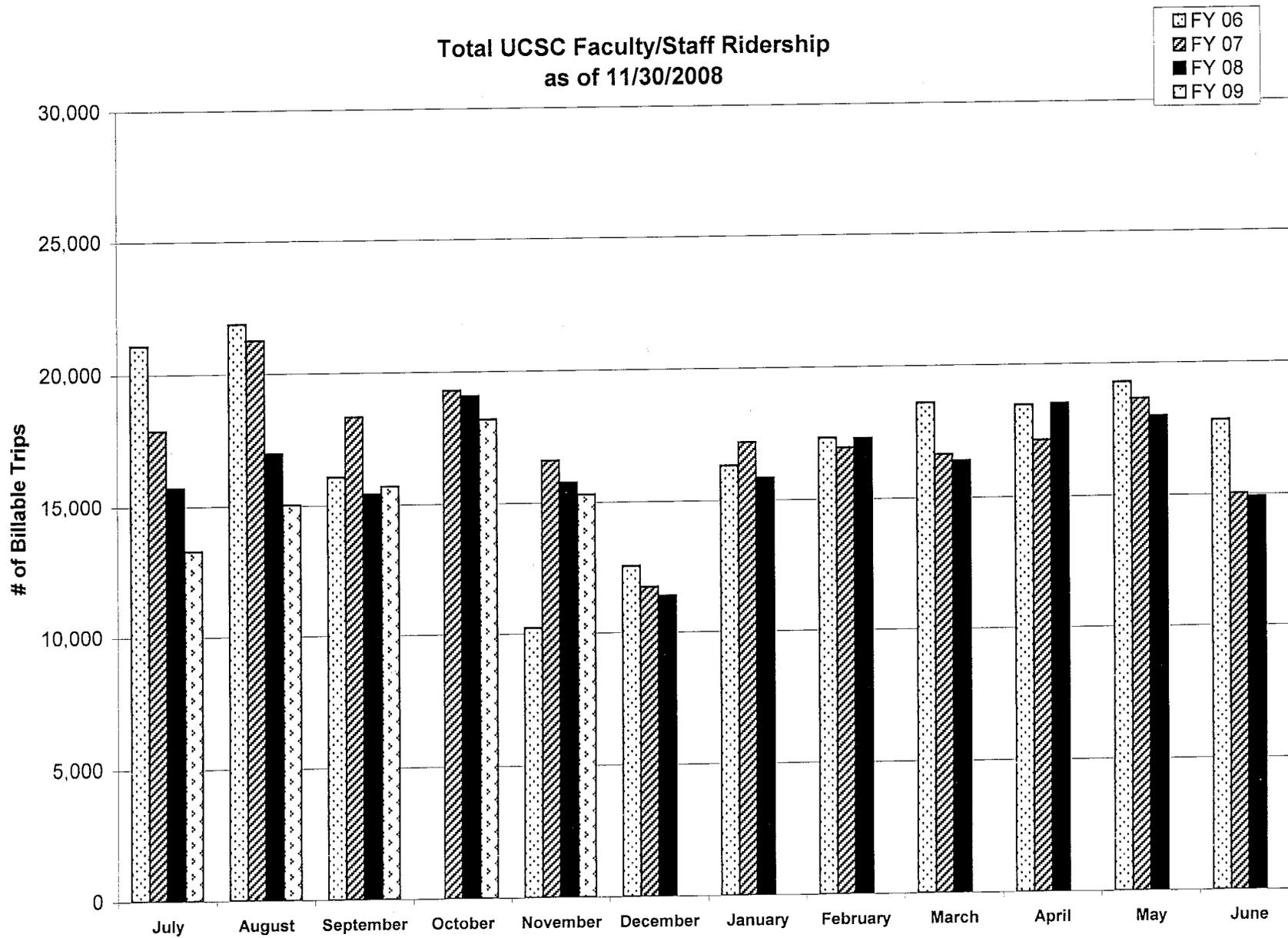
Attachment C

5-8.d1



5-8.e1

### Total UCSC Faculty/Staff Ridership as of 11/30/2008



Attachment E

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009

**TO:** Board of Directors

**FROM:** Angela Aitken, Finance Manager



**SUBJECT: UNIVERSITY OF CALIFORNIA – SANTA CRUZ  
MONTHLY SERVICE-DECEMBER 2008 VERSUS DECEMBER 2007**

## I. RECOMMENDED ACTION

**This report is for information purposes only. No action is required**

## II. SUMMARY OF ISSUES

- There were Nine (9) school-term days in 2008 and Nine (9) in 2007
- Revenue received from UCSC was \$149,561 versus \$144,450; an increase of 3.5%
- System-wide UCSC ridership increased by 3.5%
  - Total student ridership increased by 4.0%
  - Total Faculty/Staff ridership decreased by 1.0%
- Average Student ridership per school-term day increased by 23.8%
- Average Faculty/Staff ridership per weekday decreased by 33.9%

## III. DISCUSSION

For the months of December 2008 and December 2007, there were Nine (9) school-term days. The final school-term day was December 11, 2008. School-term service would resume on January 6, 2009.

UCSC Revenue increased a total of \$5,110; or 3.5%. UCSC ridership for all METRO routes was up 3.5%. This includes an 4.0% increase in student ridership and a 1.0% decrease in Faculty/Staff ridership.

Please see attached graphs that will depict Total UCSC Student and Faculty/Staff ridership increasing by 4.0% and decreasing by 1.0% respectively.

## IV. FINANCIAL CONSIDERATIONS.

Overall UCSC revenue is above FY08 by 18.9%.

5-8.3

**V. ATTACHMENTS**

- Attachment A: Total UCSC Monthly Revenue**
- Attachment B: Total UCSC Ridership**
- Attachment C: Monthly UCSC Ridership**
- Attachment D: Total UCSC Student Ridership**
- Attachment E: Total UCSC Faculty/Staff Ridership**

Prepared by: Carolyn Hamm and Erich Friedrich

5-8.4

### Total UCSC Monthly Revenue

FY 08 UCSC Revenue									
Date	Regular Student Bill	Regular Staff Bill	Night Owl Bill	Supplemental Bill	27x	TOTAL	Last Year	% Change	\$ Change
Jul-07	\$ 33,024.00	\$ 15,920.00				\$ 48,944.00	\$ 46,696.41	4.8%	\$ 2,247.59
Aug-07	\$ 38,130.53	\$ 17,149.80				\$ 55,280.33	\$ 54,014.10	2.3%	\$ 1,266.23
Sep-07	\$ 101,639.55	\$ 16,690.11	\$ 2,433.63	\$ 4,176.42	\$ 1,501.57	\$ 126,441.28	\$ 170,754.64	-26.0%	\$ (44,313.36)
Oct-07	\$ 331,758.64	\$ 20,061.49	\$ 7,658.98	\$ 8,740.07	\$ 5,020.67	\$ 373,239.85	\$ 314,022.57	18.9%	\$ 59,217.28
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Dec-07	\$ 119,753.81	\$ 12,320.21	\$ 4,731.24	\$ 4,824.85	\$ 2,820.60	\$ 144,450.71	\$ 76,128.86	89.7%	\$ 68,321.85
Jan-08	\$ 256,740.31	\$ 17,162.30	\$ 10,939.02	\$ 2,683.50	\$ 3,671.21	\$ 291,196.34	\$ 277,066.89	5.1%	\$ 14,129.45
Feb-08	\$ 276,028.54	\$ 18,729.40	\$ 13,041.41	\$ 4,439.97	\$ 4,601.84	\$ 316,841.16	\$ 256,817.50	23.4%	\$ 60,023.66
Mar-08	\$ 209,758.69	\$ 17,772.03	\$ 8,550.08	\$ 7,601.47	\$ 4,626.41	\$ 248,308.68	\$ 210,515.59	18.0%	\$ 37,793.09
Apr-08	\$ 297,663.63	\$ 20,042.00	\$ 13,705.06	\$ 7,208.57	\$ 5,651.21	\$ 344,270.47	\$ 272,972.83	26.1%	\$ 71,297.64
May-08	\$ 275,379.83	\$ 19,473.42	\$ 12,965.34	\$ 9,079.77	\$ 6,163.16	\$ 323,061.52	\$ 294,166.80	9.8%	\$ 28,894.72
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<b>FY 2008 Totals</b>	<b>\$ 2,314,555.46</b>	<b>\$ 207,987.30</b>	<b>\$ 84,468.82</b>	<b>\$ 56,802.49</b>	<b>\$ 42,102.65</b>	<b>\$ 2,705,916.71</b>	<b>\$ 2,375,566.69</b>	<b>13.9%</b>	<b>\$330,350.02</b>
FY 09 UCSC Revenue									
Date	Regular Student Bill	Regular Staff Bill	Night Owl Bill	Supplemental Bill	27x	TOTAL	Last Year	% Change	\$ Change
Jul-08	\$ 40,787.95	\$ 14,367.08	-	\$ 9,719.80	-	\$ 64,874.83	\$ 48,944.00	32.5%	\$ 15,930.83
Aug-08	\$ 43,773.78	\$ 16,273.16	-	\$ 10,973.81	-	\$ 71,020.75	\$ 55,280.33	28.5%	\$ 15,740.42
Sep-08	\$ 151,871.29	\$ 18,162.59	\$ 3,763.96	\$ 2,563.82	\$ 2,007.46	\$ 178,369.12	\$ 126,441.28	41.1%	\$ 51,927.84
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Nov-08	\$ 274,825.68	\$ 15,381.16	\$ 10,512.74	\$ 5,500.47	\$ 3,989.36	\$ 306,220.05	\$ 278,625.33	9.9%	\$ 27,594.72
Dec-08	\$ 129,527.31	\$ 11,581.57	\$ 4,892.43	\$ 3,560.21	\$ 2,118.85	\$ 149,561.52	\$ 144,450.71	3.5%	\$ 5,110.81
Jan-09						\$ -			\$ -
Feb-09						\$ -			\$ -
Mar-09						\$ -			\$ -
Apr-09						\$ -			\$ -
May-09						\$ -			\$ -
Jun-09						\$ -			\$ -
	<b>\$ 1,049,577.25</b>	<b>\$ 96,796.35</b>	<b>\$ 32,707.54</b>	<b>\$ 34,317.63</b>	<b>\$ 13,551.09</b>	<b>\$ 1,220,841.65</b>	<b>\$ 1,026,981.50</b>	<b>18.9%</b>	<b>\$193,860.15</b>

5-8.22

Attachment A



Monthly UCSC Ridership

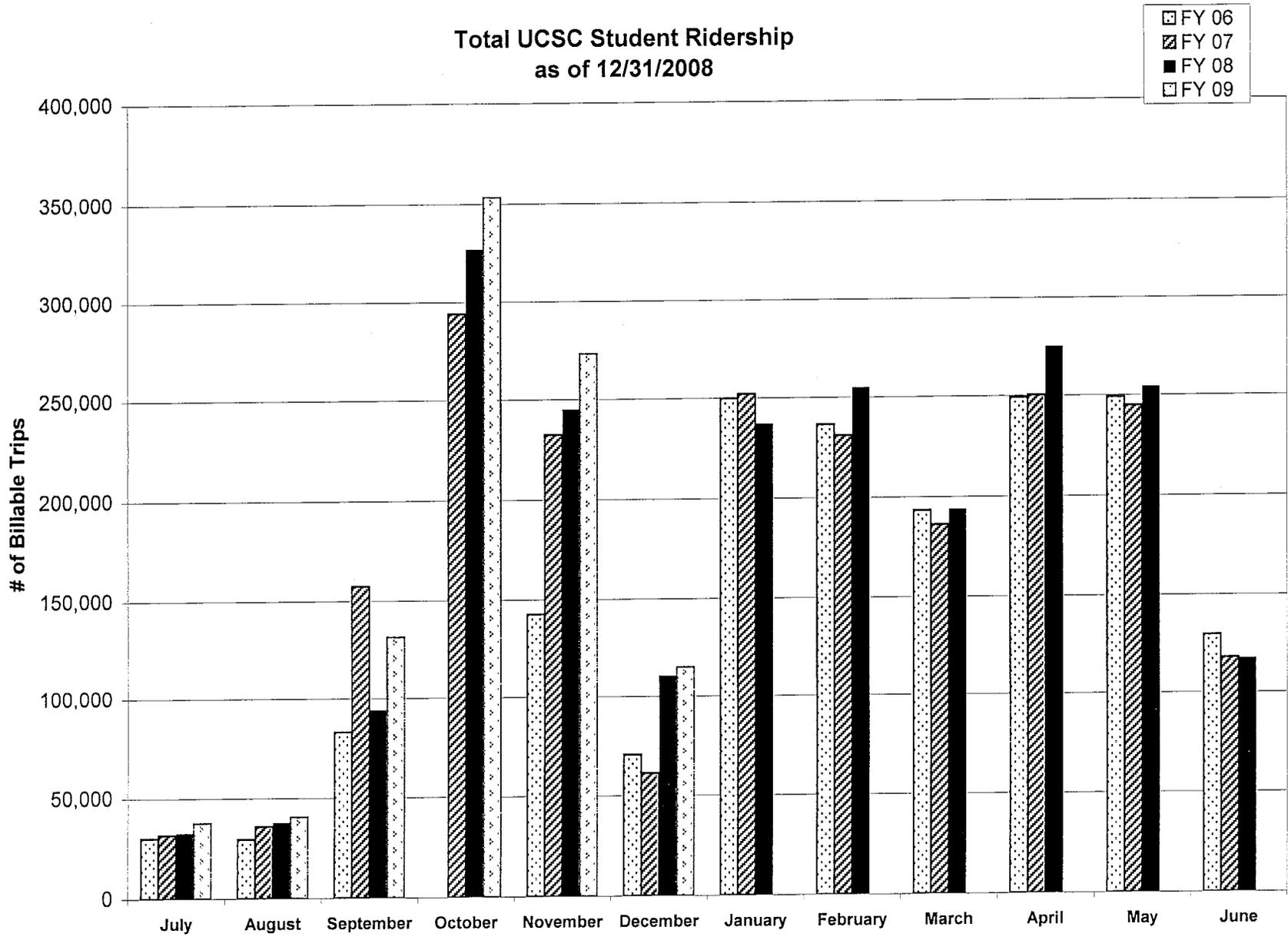
December 2008	Student Ridership			Faculty/ Staff Ridership			Average Student Ridership Per School Term Day			Average Faculty/Staff Ridership <i>Per Weekday</i>		
	FY 09	FY 08	%	FY 09	FY 08	%	FY 09	FY 08	%	FY 09	FY 08	%
Regular Service	108,307	104,212	3.9%	10,915	11,137	-2.0%	9,548.4	7,665.0	24.6%	305.1	486.9	-37.3%
Supple- mental	2,991	1,865	60.4%	155	93	66.7%	299.1	207.2	44.3%	17.2	10.3	66.7%
Night Owl	1,401	2,754	-49.1%	17	21	-19.0%	62.0	140.4	-55.8%	2.0	0.9	128.6%
27x	2,276	1,745	30.4%	176	125	40.8%	119.8	91.8	30.4%	9.3	6.6	40.8%
<b>TOTAL</b>	<b>114,975</b>	<b>110,576</b>	<b>4.0%</b>	<b>11,263</b>	<b>11,376</b>	<b>-1.0%</b>	<b>10,029.3</b>	<b>8,104.4</b>	<b>23.8%</b>	<b>333.5</b>	<b>504.7</b>	<b>-33.9%</b>

5-8.c2

Attachment C

5-8. dr

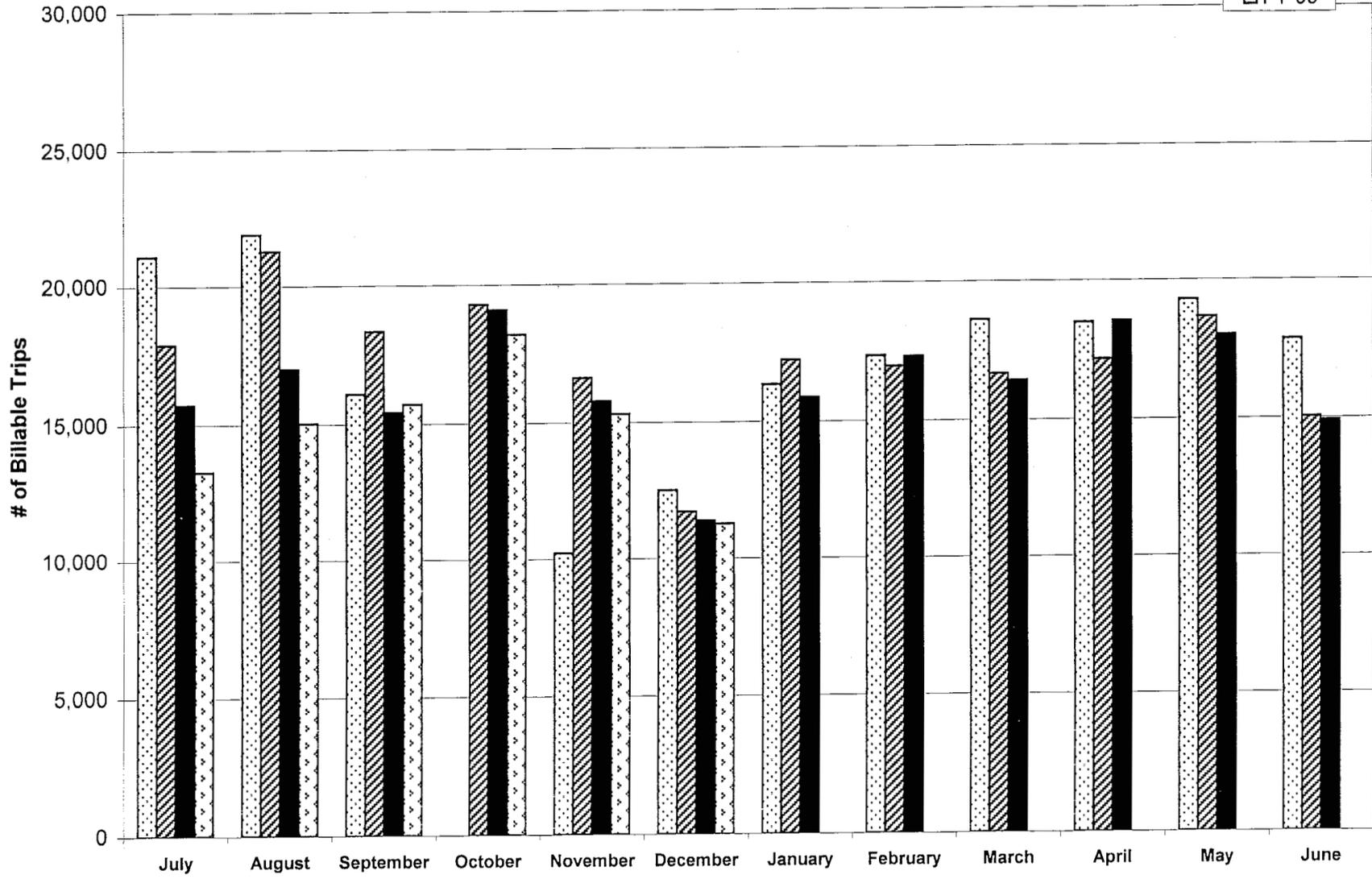
### Total UCSC Student Ridership as of 12/31/2008



Attachment D

Total UCSC Faculty/Staff Ridership  
as of 12/31/2008

FY 06  
FY 07  
FY 08  
FY 09



Attachment E

5-8.e2

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009  
**TO:** Board of Directors  
**FROM:** Frank L. Cheng, Project Manager  
**SUBJECT:** CONSIDERATION OF METROBASE STATUS REPORT

## I. RECOMMENDED ACTION

**That the Board of Directors accept and file the MetroBase Status Report.**

## II. SUMMARY OF ISSUES

- Maintenance Building
  - METRO has moved into the first phase of the new Maintenance Building.
  - West Bay Builders working on punch-list items for the first phase of building.
  - Elevator permit complete.
  - West Bay demolition and regarding on 2<sup>nd</sup> half of site commenced.
  - Trees impacted and endangered by the construction per Arborist report have been removed.
- Operations Building
  - RNL has repackaged the Operations Building.
  - Operations Building drawings have completed plan check review.
  - Invitation For Bids is pending State release of Proposition 1B Bond Funds.
- Vernon Administration Building
  - Wald, Ruhnke & Dost Architects has completed the drawings and specs.
  - Vernon Building is vacant
  - Invitation For Bids will be released in February 2009.

## III. DISCUSSION

On December 1, 2008, METRO began moving all equipment from existing Maintenance Building to new Maintenance Building. West Bay Builders is continuing to work on punch-list items for the first phase of the Maintenance Building. Elevator located next to stairway on first half of building is operational and the State Inspector issued a permit for usage.

Currently, West Bay Builders began demolition of the previous Maintenance Building. The site needs to be prepared for site grading, plumbing, and lay down area for casting tilt-up panels in the upcoming month. During the demolition, the Butler building, concrete, and asphalt were removed. Also, after an arborist study on the impact of all trees on site, some trees had high

5-9.1

impact and endangerment by the construction. These trees were recommended by the arborist to be removed.

In regards to the Operations Building, RNL Design has completed the re-package of the Operations Building. The plans have been reviewed by the City of Santa Cruz, and plan checked by Bureau Veritas. Invitation for Bids is pending State release of Proposition 1B Bond Funds.

For the current work on the River Street site, the existing bus wash was demolished and repaved. With the completion of the demo, the bus yard will have more room for assisting in the Operations Building component of the MetroBase Project. The Operation Building component will be done in multiple phases to minimize the impact on the agency.

Wald, Ruhnke & Dost (WR&D) Architects have completed drawings for the Vernon Administration Building. Drawings are in the process of plan checking. Invitation for Bids will be released in February 2009.

Information for the MetroBase Project can be viewed at <http://www.scmtd.com/metrobase> Information on the project, contact information, and MetroBase Hotline number (831) 621-9568 can be viewed on the website.

New updates on the MetroBase Project:

- Bus Wash Demo complete.
- RNL Design Operations Building re-package complete.
- WR&D Vernon Administration Building complete.

Previous information regarding the MetroBase Project:

- A. Maintenance Building (IFB 06-01)
  - West Bay working on 2<sup>nd</sup> half site work, and punch-list items for 1<sup>st</sup> half.
  - IFB 06-01 Maintenance Building awarded to West Bay Builders.
  - Weekly Construction Meetings.
- B. Operations Building
  - RNL Design Operations Building re-package complete.
  - Bus Wash Demo complete.
- C. Vernon Administration Building (IFB 08-28)
  - Wald, Ruhnke & Dost Architects complete.
  - Invitation For Bids scheduled for February 2009.

5-9.2

#### **IV. FINANCIAL CONSIDERATIONS**

Funds for the construction of the Maintenance Building, Operations Building, and Vernon Administration Building Components of the MetroBase Project are available within the funds the METRO has secured for the Project.

#### **V. ATTACHMENTS**

**Attachment A: None**

5-9.3

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009

**TO:** Board of Directors

**FROM:** Angela Aitken, Finance Manager  
April Warnock, Paratransit Superintendent

**SUBJECT: CONSIDERATION OF CONTRACT RENEWAL WITH CRUZ CAR WASH FOR PARACRUZ VEHICLE WASHING SERVICES**

## I. RECOMMENDED ACTION

**That the Board of Directors authorize the General Manager to execute an amendment to the contract with Cruz Car Wash for ParaCruz vehicle washing services to extend the term of the contract for one (1) additional year and allow a rate increase equal to the annual percentage change to the Consumer Price Index for the San Francisco-Oakland-San Jose area in effect on March 1, 2009.**

## II. SUMMARY OF ISSUES

- METRO established a contract with Cruz Car Wash for ParaCruz vehicle washing services on March 1, 2005.
- The contract will expire on February 28, 2009.
- The contract may be renewed for four (4) additional one-year terms.
- Contractor has expressed an interest in extending the contract one additional year to February 28, 2010.
- Staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Cruz Car Wash for ParaCruz vehicle washing services to extend the contract term for one additional year and allow a rate increase equal to the annual percentage change to the Consumer Price Index for the San Francisco-Oakland-San Jose area in effect on March 1, 2009.

## III. DISCUSSION

METRO established a contract with Cruz Car Wash for ParaCruz vehicle washing services on March 1, 2005. The contracts will expire on February 28, 2009. Section 4.01 of the contract allows METRO the option to renew the contract for four (4) additional one-year terms. Cruz Car Wash has provided good service under this contract. An extension of the contract would be favorable to METRO. Cruz Car Wash has also reviewed the contract and has indicated their desire to extend the contract for one additional year and allow a rate increase equal to the annual

5-10.1

percentage change to the Consumer Price Index for the San Francisco-Oakland-San Jose area in effect on March 1, 2009.

Staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Cruz Car Wash for ParaCruz vehicle washing services to extend the contract term for one additional year and allow a price increase equal to the annual percentage change to the Consumer Price Index for the San Francisco-Oakland-San Jose area in effect on March 1, 2009.

#### **IV. FINANCIAL CONSIDERATIONS**

Funds to support this contract is included in the ParaCruz FY09 operating budget. The ParaCruz vehicle washing contract is budgeted for \$10,000 for this fiscal year.

#### **V. ATTACHMENTS**

**Attachment A:** Letter from Cruz Car Wash

**Attachment B:** Cruz Car Wash Contract Amendment

Prepared By: Lloyd Longnecker, Purchasing Agent

5-10.2



## Attachment A

Full Service Car Wash & Gas  
Express Detail Service

Monday, January 26, 2009

Lloyd Longnecker  
Santa Cruz Metropolitan Transit District  
370 Encinal Street  
Suite 100  
Santa Cruz, CA 95060

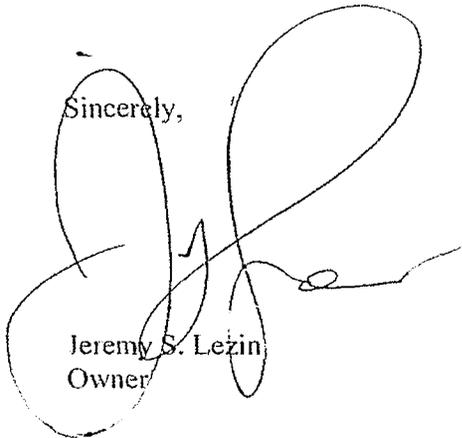
Re: District Contract No. 04-10.2009-2010 Renewal of Contract

Dear Lloyd,

I am in receipt of your letter of December 31<sup>st</sup>, regarding the renewal of our contract with Metro to wash ParaCruz vehicles. We would like to renew this contract and adjust the rates as allowed in the contract to the San Francisco/Oakland/San Jose Consumer's Price Index, in effect on March 1, 2009

I look forward to hearing from you and continuing our great relationship.

Sincerely,



Jeremy S. Lezin  
Owner

# Attachment **B**

## **SANTA CRUZ METROPOLITAN TRANSIT DISTRICT FOURTH AMENDMENT TO CONTRACT NO. 360 FOR PARACRUZ VEHICLE WASHING SERVICES**

This Fourth Amendment to Contract No. 360 for ParaCruz vehicle washing services is made effective March 1, 2009 between the Santa Cruz Metropolitan Transit District, a political subdivision of the State of California ("District") and CRUZ CAR WASH ("Contractor").

### I. RECITALS

1.1 District and Contractor entered into a Contract for ParaCruz vehicle washing services ("Contract") on March 1, 2005.

1.2 The Contract allows for the extension upon mutual written consent.

Therefore, District and Contractor amend the Contract as follows:

### II. TERM

2.1 Article 4.01 is amended to include the following language:

This Contract shall continue through February 28, 2010. This Contract may be mutually extended by agreement of both parties.

### III. COMPENSATION

3.1 Article 5.01 is amended to include the following language:

Effective March 1, 2009, the rate for vehicle washing services will be increased by the annual percentage change in the Consumer Price Index for the San Francisco-Oakland-San Jose area in effect on March 1, 2009.

### IV. REMAINING TERMS AND CONDITIONS

4.1 All other provisions of the Contract that are not affected by this amendment shall remain unchanged and in full force and effect.

SIGNATURES ON NEXT PAGE

V. AUTHORITY

5.1 Each party has full power to enter into and perform this Fourth Amendment to the Contract and the person signing this Fourth Amendment on behalf of each has been properly authorized and empowered to enter into it. Each party further acknowledges that it has read this Fourth Amendment to the Contract, understands it, and agrees to be bound by it.

Signed on \_\_\_\_\_

DISTRICT  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

\_\_\_\_\_  
Leslie R. White  
General Manager

CONTRACTOR  
CRUZ CAR WASH

By \_\_\_\_\_  
Jeremy S. Lezin  
President

Approved as to Form:

\_\_\_\_\_  
Margaret R. Gallagher  
District Counsel

5-10.62<sup>2</sup>

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009

**TO:** Board of Directors

**FROM:** Angela Aitken, Finance Manager  
April Warnock, Paratransit Superintendent

**SUBJECT: CONSIDERATION OF CONTRACT RENEWAL WITH STEVE'S UNION  
FOR PARACRUZ VEHICLE FUELING SERVICES**

## I. RECOMMENDED ACTION

**That the Board of Directors authorize the General Manager to execute an amendment to the contract with Steve's Union for ParaCruz vehicle fueling services to extend the term of the contract for one (1) additional year.**

## II. SUMMARY OF ISSUES

- METRO established a contract with Steve's Union for ParaCruz vehicle fueling services on March 1, 2005.
- The contract will expire on February 28, 2009.
- The contract may be renewed for four (4) additional one-year terms.
- Contractor has expressed an interest in extending the contract one additional year to February 28, 2010.
- Staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Steve's Union for ParaCruz vehicle fueling services to extend the contract term for one additional year.

## III. DISCUSSION

METRO established a contract with Steve's Union for ParaCruz vehicle fueling services on March 1, 2005. The contracts will expire on February 28, 2009. Section 4.01 of the contract allows METRO the option to renew the contract for four (4) additional one-year terms. Steve's Union has provided good service under this contract. An extension of the contract would be favorable to METRO. Steve's Union has also reviewed the contract and has indicated their desire to extend the contract for one additional year.

Staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Steve's Union for ParaCruz vehicle fueling services to extend the contract term for *one additional year*.

5-11.1

**IV. FINANCIAL CONSIDERATIONS**

Funds to support this contract is included in the ParaCruz FY09 operating budget. The ParaCruz vehicle fueling contract is budgeted for \$250,000 for this fiscal year.

**V. ATTACHMENTS**

**Attachment A:** Letter from Steve's Union

**Attachment B:** Steve's Union Contract Amendment

Prepared By: Lloyd Longnecker, Purchasing Agent

5-11.2

STEVE'S UNION SERVICE  
1500 Soquel Drive  
Santa Cruz, CA 95065-1711  
831 476-3857

Attachment **A**

1/2/08

MR Lloyd Longnecker

S.C. Metro

370 ENCINAL ST Suite 100

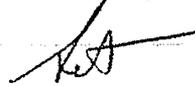
Santa Cruz Ca. 95060

RE: DISTRICT Contract NO. 04-10 Fuelink PARA CRUZ vehicles

DEAR MR. Longnecker,

I am in agreement to extend the contract for an  
additional one-year period.

Sincerely,



STEVE ONETO

5-11.a1

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
FOURTH AMENDMENT TO CONTRACT NO. 361  
FOR PARACRUZ VEHICLE FUELING SERVICES**

This Fourth Amendment to Contract No. 361 for ParaCruz vehicle fueling services is made effective March 1, 2009 between the Santa Cruz Metropolitan Transit District, a political subdivision of the State of California ("METRO") and STEVE'S UNION SERVICE ("Contractor").

I. RECITALS

1.1 METRO and Contractor entered into a Contract for ParaCruz vehicle fueling services ("Contract") on March 1, 2005.

1.2 The Contract allows for the extension upon mutual written consent.

Therefore, METRO and Contractor amend the Contract as follows:

II. TERM

2.1 Article 4.01 is amended to include the following language:

This Contract shall continue through February 28, 2010. This Contract may be mutually extended by agreement of both parties.

III. REMAINING TERMS AND CONDITIONS

3.1 All other provisions of the Contract that are not affected by this amendment shall remain unchanged and in full force and effect.

IV. AUTHORITY

4.1 Each party has full power to enter into and perform this Fourth Amendment to the Contract and the person signing this Fourth Amendment on behalf of each has been properly authorized and empowered to enter into it. Each party further acknowledges that it has read this Fourth Amendment to the Contract, understands it, and agrees to be bound by it.

SIGNATURES ON NEXT PAGE

Signed on \_\_\_\_\_

METRO  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

---

Leslie R. White  
General Manager

CONTRACTOR  
STEVE'S UNION SERVICE

By \_\_\_\_\_  
Steve Oneto  
President

Approved as to Form:

---

Margaret R. Gallagher  
District Counsel

5-11.62<sup>2</sup>

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009

**TO:** Board of Directors

**FROM:** Angela Aitken, Finance Manager  
Robyn Slater, Human Resources and Acting Maintenance Manager

**SUBJECT: CONSIDERATION OF CONTRACT RENEWAL WITH DIXON & SON TIRES, INC. FOR PURCHASE OF REVENUE AND NON-REVENUE TIRES**

## I. RECOMMENDED ACTION

**That the Board of Directors authorize the General Manager to execute an amendment to the contract with Dixon and Son Tires, Inc. to extend the term of the contract for one (1) additional year with no change to the terms and conditions.**

## II. SUMMARY OF ISSUES

- METRO established a contract with Dixon & Son Tires, Inc. for revenue and non-revenue tires on March 1, 2006.
- METRO has an option to renew this contract for four (4) additional one-year terms.
- Dixon & Son Tires, Inc. has indicated that they are interested in extending the contract an additional year to February 28, 2010 with no change to the terms and conditions.
- Staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Dixon and Son Tires, Inc. to extend the term of the contract for one (1) additional year with no change to the terms and conditions.

## III. DISCUSSION

METRO's current contract with Dixon & Son Tires, Inc. for revenue and non-revenue tires is due to expire on February 28, 2009. Dixon & Son, Inc. has provided good service under this contract. An extension of the contract would be favorable to METRO. Section 3.02 of the contract allows METRO the option to renew the contract for four (4) additional one-year terms. Dixon & Son, Inc. has also reviewed the contract and has indicated their desire to extend the contract for one additional year with no change to the terms and conditions.

Staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Dixon and Son Tires, Inc. to extend the term of the contract for one (1) additional year with no change to the terms and conditions.

5-12.1

**IV. FINANCIAL CONSIDERATIONS**

Funds to support this contract amendment are included in the Fleet FY09 (\$180,000) and FY10 (\$187,000) Tires and Tubes budget.

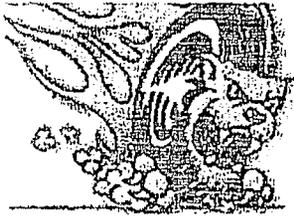
**V. ATTACHMENTS**

**Attachment A:** Letter from Dixon & Son Tires, Inc.

**Attachment B:** Amendment to Contract with Dixon and Son Tires, Inc.

Prepared By: Lloyd Longnecker, Purchasing Agent

5-12.2



Attachment **A**  
**DIXON & SON TIRES INCORPORATED**

DIXON AND SON TIRE INC.  
125 WALKER ST  
WATSONVILLE, CA 95076

February 3, 2009

Santa Cruz Metropolitan  
Transit District  
120 Du Bois Street  
Santa Cruz, Ca 95060

Attn: Lloyd Longnecker,

Re: Letter of Intent to Extend Revenue and Non Revenue Vehicle Tires Contract

Dixon & Son Tire would like to extend the current Tire Contract with the Santa Cruz Metro for an additional year.

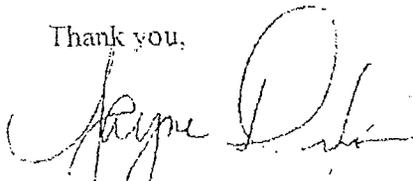
Dixon and Son is willing to waive the Consumer Price Index increase option on Bandag Retreading, Non Revenue Tires, Valve Stems, and Labor.

All new Revenue Tire will remain the same as last year and be billed at the net state price.

The state adjusts the net state prices annually on March 1.

We look forward to continuing doing business with you, and if you have any questions or comments, please call me at (831) 722-4197.

Thank you,



Jayne Dixon

125 Walker St. Watsonville CA. 95076  
Tel. (831) 722 4197

5-12.a1

# Attachment B

## SANTA CRUZ METROPOLITAN TRANSIT DISTRICT THIRD AMENDMENT TO CONTRACT FOR REVENUE AND NON-REVENUE TIRES

This Third Amendment to the Contract for revenue and non-revenue tires is made effective March 1, 2009 between the Santa Cruz Metropolitan Transit District, a political subdivision of the State of California ("METRO") and Dixon and Son Tires, Inc. ("Contractor").

### I. RECITALS

- 1.1 METRO and Contractor entered into a Contract for revenue and non-revenue tires ("Contract") on March 1, 2006.
- 1.2 The Contract allows for the extension upon mutual written consent.

Therefore, METRO and Contractor amend the Contract as follows:

### II. TERM

- 2.1 Article 3.02 is amended to include the following language:

This Contract shall continue through February 28, 2010. This Contract may be mutually extended by agreement of both parties.

### III. REMAINING TERMS AND CONDITIONS

- 3.1 All other provisions of the Contract that are not affected by this amendment shall remain unchanged and in full force and effect.

### IV. AUTHORITY

- 4.1 Each party has full power to enter into and perform this Third Amendment to the Contract and the person signing this Third Amendment on behalf of each has been properly authorized and empowered to enter into it. Each party further acknowledges that it has read this Third Amendment to the Contract, understands it, and agrees to be bound by it.

SIGNATURES ON NEXT PAGE

5-12.61<sup>1</sup>

Signed on \_\_\_\_\_

METRO  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

\_\_\_\_\_  
Leslie R. White  
General Manager

CONTRACTOR  
DIXON AND SON TIRES, INC.

By \_\_\_\_\_  
Dave H. Dixon  
Owner

Approved as to Form:

\_\_\_\_\_  
Margaret R. Gallagher  
District Counsel

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009

**TO:** Board of Directors

**FROM:** Angela Aitken, Finance Manager  
Ciro Aguirre, Manager of Operations

**SUBJECT: CONSIDERATION OF CONTRACT EXTENSION WITH PAT PIRAS CONSULTING FOR REVIEW OF THE ADA PARATRANSIT ELIGIBILITY PROCESS**

## I. RECOMMENDED ACTION

**It is recommended that the Board of Directors authorize the General Manager to execute an amendment to the contract with Pat Piras Consulting to extend the contract for review of the ADA Paratransit eligibility process through June 30, 2009.**

## II. SUMMARY OF ISSUES

- METRO entered into a contract with Pat Piras Consulting for review of the ADA paratransit eligibility process on May 5, 2008.
- This contract will expire on March 31, 2009.
- METRO has purchased the Trapeze CERT module and contractor has offered to provide new template forms necessary for the eligibility process.
- Staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Pat Piras Consulting for review of ADA paratransit eligibility process to extend the term of the contract to June 30, 2009. This will be a time extension only and there will be no additional contract compensation.

## III. DISCUSSION

METRO entered into a contract with Pat Piras Consulting for review of the ADA paratransit eligibility process on May 5, 2008. Contract was to expire on March 31, 2008. METRO has purchased the Trapeze CERT module which is used in the eligibility certification process. There have been technical difficulties with the new module causing delays in its implementation. The contractor has recommended extending the contract term in order to provide new template forms necessary for the eligibility process and to provide assistance in the implementation process.

Staff recommends that the Board of Directors authorize the General Manager to execute an amendment to the contract with Pat Piras Consulting for review of the ADA paratransit eligibility process to extend the term of the contract to June 30, 2009. This will be a time extension only and there will be no additional contract compensation.

5-13.1

**IV. FINANCIAL CONSIDERATIONS**

No financial implications from this action.

**V. ATTACHMENTS**

**Attachment A:** Contract Amendment

Prepared By: Lloyd Longnecker, Purchasing Agent

5-13.2

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
THIRD AMENDMENT TO CONTRACT NO. 08-22  
FOR REVIEW OF ADA PARATRANSIT ELIGIBILITY PROCESS**

This Third Amendment to Contract No. 08-22 for review of ADA paratransit eligibility process is made effective April 1, 2009 between the Santa Cruz Metropolitan Transit District, a political subdivision of the State of California ("METRO") and Pat Piras Consulting ("Contractor").

I. RECITALS

- 1.1 METRO and Contractor entered into a Contract for Review of ADA paratransit eligibility process ("Contract") on May 5, 2008.
- 1.2 On July 25, 2008, METRO extended the contract term to November 30, 2008.
- 1.3 On November 21, 2008, METRO extended the contract term to March 31, 2009.
- 1.4 The Contract allows for the extension upon mutual written consent.

Therefore, METRO and Contractor amend the Contract as follows:

II. TERM

- 2.1 Article 4.01 is amended to include the following language:

This Contract shall continue through June 30, 2009. This Contract may be mutually extended by agreement of both parties.

III. REMAINING TERMS AND CONDITIONS

- 3.1 All other provisions of the Contract that are not affected by this amendment shall remain unchanged and in full force and effect.

IV. AUTHORITY

- 4.1 Each party has full power to enter into and perform this Third Amendment to the Contract and the person signing this Third Amendment on behalf of each has been properly authorized and empowered to enter into it. Each party further acknowledges that it has read this Third Amendment to the Contract, understands it, and agrees to be bound by it.

SIGNATURES ON NEXT PAGE

Signed on \_\_\_\_\_

METRO  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

\_\_\_\_\_  
Leslie R. White  
General Manager

CONTRACTOR  
PAT PIRAS CONSULTING

By \_\_\_\_\_  
Patrishia Piras  
Principal/Director

Approved as to Form:

\_\_\_\_\_  
Margaret R. Gallagher  
District Counsel

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009  
**TO:** Board of Directors  
**FROM:** Angela Aitken, Finance Manager  
**SUBJECT:** **CONSIDERATION OF A RESOLUTION AUTHORIZING TWO NEW SIGNERS ON THE DEPOSIT ACCOUNT FOR THE ADMINISTRATION OF APPROVED WORKERS' COMPENSATION CLAIMS WITH COMERICA BANK**

## I. RECOMMENDED ACTION

**That the Board of Directors adopt the resolution authorizing two new signers to the Comerica Bank deposit account for the workers' compensation trust fund.**

## II. SUMMARY OF ISSUES

- The Board of Directors of METRO adopted a resolution on February 25, 2005, establishing a deposit account with Comerica Bank for a trust fund for the purpose of paying approved workers' compensation claims.
- The program administrator, Octagon Risk Services, Inc., was acquired by Sedgwick Claims Management Services (CMS), Inc, on September 13, 2006.
- Sedgwick Claims Management Services (CMS), Inc, requested that two signers be added to the account as a result of the acquisition.
- The Board of Directors of METRO adopted a resolution on November 10, 2006, adding Forrest Norris, Octagon Vice President, and Bob Blankenship, Octagon Financial Reporting Manager.
- Staff is requesting that Les White, General Manager, and Angela Aitken, Finance Manager be added as authorized signers on the account.

## III. DISCUSSION

The Board of Directors of METRO adopted a resolution on February 25, 2005, establishing a deposit account with Comerica Bank for a trust fund for the purpose of paying approved workers' compensation claims.

The program administrator, Octagon Risk Services, Inc., was acquired by Sedgwick Claims Management Services (CMS), Inc, on September 13, 2006.

Sedgwick Claims Management Services (CMS), Inc, requested that two signers be added to the account as a result of the acquisition.

The Board of Directors of METRO adopted a resolution on November 10, 2006, adding Forrest Norris, Octagon Vice President, and Bob Blankenship, Octagon Financial Reporting Manager.

Staff is requesting that Les White, General Manager and Angela Aitken, Finance Manager be added as authorized signers on the account, since all other signers were superseded in prior updates.

5-14.1

**IV. FINANCIAL CONSIDERATIONS**

Annual contract with Sedgwick Claims Management Services (CMS) (formerly Octagon Risk) is \$130,000, and funds are provided for in the FY09 Operating Budget.

**V. ATTACHMENTS**

**Attachment A:** Resolution Authorizing Two Additional Signers on the Deposit Account for the Administration of Approved Workers' Compensation Claims with Comerica Bank.

5-14.2

**BEFORE THE BOARD OF DIRECTORS OF THE  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT**

Resolution No. \_\_\_\_\_  
On the Motion of Director: \_\_\_\_\_  
Duly Seconded by Director: \_\_\_\_\_  
The Following Resolution is Adopted:

**Attachment A**

**A RESOLUTION AUTHORIZING TWO NEW SIGNERS ON THE DEPOSIT ACCOUNT  
FOR THE ADMINISTRATION OF APPROVED WORKERS' COMPENSATION CLAIMS  
WITH COMERICA BANK**

**WHEREAS**, the Santa Cruz Metropolitan Transit District has entered into a contract with Octagon Risk Services, Inc., for administering workers' compensation claims, and

**WHEREAS**, the Santa Cruz Metropolitan Transit District has established a deposit account with Comerica ("Bank") as a trust fund for the purpose of paying approved workers' compensation claims effective February 25, 2005; and

**WHEREAS**, Sedgwick Claims Management Services (CMS) acquired Octagon Risk Services, Inc., as of September 13, 2006, and the following individuals were added on November 10, 2006 as authorized signers on the account:

Forrest Norris, Octagon Vice President  
Bob Blankenship, Octagon Financial Reporting Manager

**NOW, THEREFORE BE IT RESOLVED AND ORDERED** that the following individuals be added as authorized signers on the account:

Les White, General Manager  
Angela Aitken, Finance Manager

**PASSED AND ADOPTED** this 27<sup>th</sup> day of February 2009 by the following vote:

**AYES:** Directors -  
**NOES:** Directors -  
**ABSENT:** Directors -  
**ABSTAIN:** Directors -

**APPROVED** \_\_\_\_\_  
Dene Bustichi  
Board Chair

**ATTEST** \_\_\_\_\_  
LESLIE R. WHITE  
General Manager

**APPROVED AS TO FORM:**

\_\_\_\_\_  
MARGARET GALLAGHER  
District Counsel

5-14.a1

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009  
**TO:** Board of Directors  
**FROM:** Ciro Aguirre, Manager of Operations  
**SUBJECT: CONSIDERATION OF AGREEMENT WITH THE SANTA CRUZ SEASIDE COMPANY FOR THE PROVISION OF LATE-NIGHT SERVICE**

## I. RECOMMENDED ACTION

**That the Board authorize staff to enter into an agreement with the Santa Cruz Seaside Company to subsidize the operation of Late-Night Service on Route 71.**

## II. SUMMARY OF ISSUES

- METRO has operated a late-night trip on Route 71 that has been subsidized by the Seaside Company (Boardwalk).
- The Boardwalk agrees to pay the costs of the extra service that will operate from the Boardwalk.
- The service has been extremely successful and the Boardwalk is again interested in providing the service.

## III. DISCUSSION

The Seaside Company (Boardwalk) has requested METRO to extend the starting point for the last Route 71 trip to include the Boardwalk for the Summer of 2009. Their interest is due to the fact that a large number of their employees are young students living in Watsonville, and the Metro bus service ends before the end of their employees evening shift. The Seaside Company has assured that METRO would not incur costs by agreeing to fund the cost of the route extension.

The service has been provided in previous years during Summer, and again, would be provided through the entire Summer bid. The service will operate for 96 days, from June 11 to September 16, 2009. The Boardwalk requires the late service for less than that period, but they have agreed to fully underwrite the cost of the service extension to the Beach area for the entire bid.

The total cost for the service is estimated at approximately \$1,800.

5-15.1

**IV. FINANCIAL CONSIDERATIONS**

There is no financial impact on METRO as the Boardwalk is picking up the full cost of the extension for the entire bid.

**V. ATTACHMENTS**

**Attachment A:** February 03, 2009 Letter from Santa Cruz Seaside Company



## Attachment A

February 3, 2009

Ciro Aguirre  
Manager of Operations  
Santa Cruz Metropolitan Transit District  
370 Encinal Street Suite 100  
Santa Cruz, CA 95060

RE: 2009 Request for Late Night Transit Service on route 71 to Watsonville for the summer

Dear Ciro;

Please take the Santa Cruz Seaside Company request for late night service to Watsonville for the summer of 2009 to the Santa Cruz Metropolitan Transit District Board. The Santa Cruz Seaside Company will sign another Agreement for Transit Service, between the Santa Cruz Metropolitan Transit District (SCMTD) and the Santa Cruz Seaside Company, for summer bus service to connect our employees to the Metro Center for late night service on route 71.

Thank you for keeping the contract the same amount as last year at \$1,800. Our employees use the service as do other beach area business employees. We appreciate the Transit District responding to our company and other beach area employer's needs.

Sincerely,

Jo Anne Dlott  
Vice President Human Resources

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009  
**TO:** Board of Directors  
**FROM:** Robyn D. Slater, Human Resources Manager  
**SUBJECT:** **CONSIDER APPROVAL OF CLASS SPECIFICATION CHANGE FROM SENIOR ACCOUNTING TECHNICIAN TO PURCHASING ASSISTANT**

## **RECOMMENDED ACTION**

**That the Board of Directors approve the revised class specification (job description) moving one of the incumbents in the Senior Accounting Technician class specification to the newly created class specification of Purchasing Assistant**

## **II. SUMMARY OF ISSUES**

- The Memorandum of Understanding (MOU) between METRO and the Service Employees International Union (SEIU), Local 521 states an employee can request a review of their class specification. One of the incumbents in the classification of Senior Accounting Technician requested such a review.
- The Senior Accounting Technician class specification has not been updated since January 1999.
- The position is written as a general accounting position. Currently there are five incumbents in this class specification performing varied duties.
- A new class specification of Purchasing Assistant was created to reflect the specific duties of the employee that works in the Purchasing area of the Finance department.
- A wage survey was conducted using the new Purchasing Assistant class specification.
- The results of the survey showed that the current wage range for the Senior Accounting Technician was also appropriate for the Purchasing Assistant class specification.
- As part of this process meetings were held with the affected employee and representatives of SEIU and consensus was reached on both the new class specification and the determination to use the wage range for the Senior Accounting Technician.

## **III. DISCUSSION**

The current MOU with SEIU Local 23 states that employees can request reclassification studies of their class specification and wage range in December and June. One of the incumbents in the Senior Accounting Technician asked for a reclassification.

5-16.1

The Senior Accounting Technician class specification was last updated in 1999. The position is written as a general accounting position and encompasses many of the functions performed in the accounting field.

Currently there are five incumbents in the Senior Accounting Technician class specification. Based on the MOU language this reclassification was accepted because the individual was requesting her position be moved out of the Senior Accounting Technician class specification to a new individual class specification. No other employee in the Senior Accounting Technician class specification was affected by this reclassification.

Many of the specific duties performed by the incumbent were not adequately explained in the Senior Accounting Technician class specification. A new class specification of Purchasing Assistant was created using information provided by the incumbent, and her supervisor. The new Purchasing Assistant class specification was created so that it accurately reflects the specific job duties that were identified in the reclass process.

Once consensus was reached on the new class specification a wage survey was conducted. The Purchasing Assistant class specification was distributed to specific transit and governmental agencies to review and provide information on like positions in their organization.

Based on the information collected it was determined that the wage scale for the Senior Accounting Technician was also appropriate for the new Purchasing Assistant class specification.

As part of this process meetings were held with the affected employee and representatives of SEIU. Consensus was reached on both Purchasing Assistant class specification and the determination to use the wage range for the Senior Accounting Technician.

#### **IV. FINANCIAL CONSIDERATIONS**

There is no fiscal impact to this action.

#### **V. ATTACHMENTS**

**Attachment A: Purchasing Assistant Class Specification**

5-16.2

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

## Attachment A

### PURCHASING ASSISTANT

#### DEFINITION

Under close supervision, the Purchasing Assistant performs a variety of routine activities in the acquisition, approval, receipt and record keeping for purchased equipment, materials, services and supplies; performs routine purchasing. Researches, resolves, and maintains assigned product, price, and delivery discrepancies; and performs related duties as assigned.

#### DISTINGUISHING CHARACTERISTICS

Purchasing Assistant is a paraprofessional. Incumbents initially perform duties under close supervision; but as experience is gained incumbents independently perform routine or standard purchasing activities within established policies and parameters and assist vendors and METRO staff in resolving problems and understanding METRO purchasing procedures.

#### EXAMPLES OF DUTIES

- Receives requisitions; analyzes requisitions for compliance with METRO standards and ensures information is complete and accurate; identifies possible suppliers;
- Performs routine purchasing assignments, obtains quotes, and places orders;
- Assists with determining specification requirements on assigned purchases; confers with departments to obtain required information and resolve questions regarding requirements;
- Investigates, assesses, and resolves straightforward product (e.g. damaged goods, incorrect merchandise), receiving (e.g., failure to deliver on time), vendor (e.g., billing problems), or other problems, complaints or discrepancies; contacts vendors and suppliers and appropriate internal departments to resolve issues;
- Uses CAL Card purchasing card on selected small purchases within established authorization limits; and maintains related records;
- Reviews and analyzes quotations and bids received from suppliers and verifies for accuracy and completeness; calculates discounts; evaluates prices, delivery conditions and the quality and suitability of supplies, materials, services and equipment;
- Performs purchase order and catalog file maintenance
- Provides technical training of procedures to others
- Within level of authority, determines or recommends appropriate suppliers and vendors as determined by METRO purchasing policies and procedures;
- May assist purchasing agent in researching, developing, writing and compiling Invitation for Bids, Request for Quotations and Request for Proposals; collects and analyzes purchasing related data; writes correspondence; compiles statistical reports;
- Acts as METRO liaison with vendors and suppliers; educates vendors and suppliers regarding purchasing policies and procedures; requests and obtains information about products and services from suppliers and vendors; maintain vendor files.
- Interacts with other METRO departments to provide assistance and information as required; regularly follows-up with departments on orders placed; coordinates end of year purchasing requirements for METRO departments
- Performs related duties as required.

5-16.a1

## EMPLOYMENT STANDARDS

Sufficient training, education, and experience to demonstrate the ability to perform the above tasks and possession of the knowledge and abilities listed.

### Knowledge of:

- Methods, procedures, and terminology used in public agency purchasing;
- Applicable state, and federal laws and regulations governing purchasing activities;
- General types and sources of equipment, materials and supplies used by a transportation authority;
- Standard office practices and procedures;
- Business correspondence, formats, report writing and proper business English usage, including grammar, spelling and punctuation;
- Good customer service skills.

### Ability to:

- Operate a computer and word processing, spreadsheet and other standard software;
- Organize, set priorities and exercise sound judgment within established guidelines;
- Make calculations quickly and accurately;
- Research discrepancies and make sound determinations regarding their resolution;
- Understand and follow written and oral instructions;
- Prepare clear, concise and highly accurate records and reports;
- Communicate clearly and effectively orally and in writing;
- Use tact, discretion, and diplomacy in dealing with contractors and vendors;
- Research and analyze products and vendors;
- Collect, assemble, and analyze technical data;
- Understand, interpret, explain and apply METRO, state and federal rules, regulations, laws and policies;
- Establish and maintain effective working relationships with METRO departments, suppliers, vendors and others encountered in the course of work.

## TRAINING AND EXPERIENCE

High school degree or G.E.D. and two years of purchasing-related or equivalent experience.

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009

**TO:** Board of Directors

**FROM:** Frank L. Cheng, Project Manager

**SUBJECT: CONSIDERATION OF AUTHORIZING THE GENERAL MANAGER TO EXECUTE A CONTRACT AMENDMENT FOR A CHANGE ORDER IN THE AMOUNT OF NOT-TO-EXCEED \$2,688.70 FROM JOS. J. ALBANESE TO PROVIDE ADDITIONAL FUNDS TO THE DEMOLITION AND REPAVING CONTRACT TO ACCOMMODATE COSTS RELATING TO UNFORSEEN SOILS CONDITION CAUSED BY THE WET WEATHER CONDITIONS**

## I. RECOMMENDED ACTION

**That the Board of Directors authorize the General Manager to execute a contract amendment for a change order in the amount of Not-To-Exceed \$2,688.70 from Jos. J. Albanese to provide additional funds to the demolition and repaving contract to accommodate costs relating to unforeseen soils condition caused by the wet weather conditions.**

## II. SUMMARY OF ISSUES

- On January 9, 2009, the Board of Directors approved a contract with Jos. J. Albanese for the demolition and repaving of the old bus wash area at 1200 River Street, Santa Cruz in the amount of \$28,850.
- On January 22, 2009, Jos J Albanese commenced the work
- During the demolition, wet weather conditions hindered the work site.
- Extra work to remove wet soils was required.
- An additional amount of Not-To-Exceed \$2,688.70 is required for the demolition contract that will cover the extra work required to excavate and replace the unsuitable soils.

## III. DISCUSSION

On January 9, 2009, the Board of Directors approved a contract with Jos. J. Albanese for the demolition and repaving of the old bus wash area at 1200 River Street, Santa Cruz in the amount of \$28,850. The estimated timeframe for the project was three weeks. METRO staff and Jos. J. Albanese had an onsite meeting and was able to determine a construction period of 1.5 weeks.

On January 22, 2009, Jos J Albanese commenced the work. In the process of demolition and paving, wet unsuitable soils were discovered. The wet weather conditions hindered the work site and extra work to remove unsuitable soils was required. With the quick turn around time, the work was completed in one week. The finished asphalt product was allowed to sit unused for two

5-17.1

days to fully cure. METRO staff stripped the area and began using the area on January 29, 2009. The full impact to staff was only 1.5 weeks.

An additional amount of Not-To-Exceed \$2,688.70 is required for the demolition contract that will cover the extra work required to excavate and replace the unsuitable soils. Staff is therefore recommending that the General Manager be authorized to execute an amendment for a Change Order in the amount of Not-To-Exceed \$2,688.70 to Jos. J. Albanese for the demolition and repaving contract to accommodate costs relating to unforeseen soils condition caused by the wet weather conditions.

#### **IV. FINANCIAL CONSIDERATIONS**

This Change Order, in the amount of Not-To-Exceed \$2,688.70 will increase the total contract with Jos. J. Albanese to \$31,538.70. Funds are available in the MetroBase Project to cover this Change Order.

#### **V. ATTACHMENTS**

**None**

5-17.2

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009  
**TO:** Board of Directors  
**FROM:** Robyn Slater, Human Resources Manager  
**SUBJECT: PRESENTATION OF EMPLOYEE LONGEVITY AWARDS**

## I. RECOMMENDED ACTION

**Staff recommends that the Board of Directors recognize the anniversaries of those District employees named on the attached list and that the Board Chair present them with awards.**

## II. SUMMARY OF ISSUES

- None.

## III. DISCUSSION

Many employees have provided dedicated and valuable years to the Santa Cruz Metropolitan Transit District. In order to recognize these employees, anniversary awards are presented at five-year increments beginning with the tenth year. In an effort to accommodate those employees that are to be recognized, they will be invited to attend the Board meetings to receive their awards.

## IV. FINANCIAL CONSIDERATIONS

None.

## V. ATTACHMENTS

**Attachment A:** Employee Recognition List

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
EMPLOYEE RECOGNITION**

**TEN YEARS**

Jukka Naukkarinen, Bus Operator  
Brenda H. Malphrus, Bus Operator  
Eloise Kelly, Bus Operator

**FIFTEEN YEARS**

None

**TWENTY YEARS**

None

**TWENTY-FIVE YEARS**

None

**THIRTY YEARS**

None

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009

**TO:** Board of Directors

**FROM:** Angela Aitken, Finance Manager 

**SUBJECT: PUBLIC HEARING: CONSIDERATION OF ADOPTING THE SHORT RANGE TRANSIT PLAN**

## I. RECOMMENDED ACTION

**That the Board of Directors receive public comments and consider adopting the final Short Range Transit Plan.**

## II. SUMMARY OF ISSUES

- METRO received a federal grant to develop a Short Range Transit Plan and contracted with Wilbur Smith Associates to perform the work.
- Wilbur Smith Associates presented the Draft Short Range Transit Plan to the Board on July 11, 2008 and outlined a proposed Trunk and Feeder Service Option.
- At that time, staff was directed to prepare a public outreach campaign to solicit public input on the Trunk and Feeder Service Option.
- In developing the public outreach process, staff found the Trunk and Feeder Service Option to be infeasible.
- Staff presented its findings to the Board December 19, 2008 and recommended removing the Trunk and Feeder Service Option.
- Staff was directed to have Wilbur Smith Associates revise the draft Short Range Transit Plan without the Trunk and Feeder Service Option and present it for adoption.
- The Board also requested that the final SRTP add new information on required technology to make the Trunk and Feeder Service Option possible.
- Wilbur Smith Associates has now submitted the final Short Range Transit Plan with the requested Board directed revisions.
- The public hearing will provide comments for consideration in adopting the final Short Range Transit Plan.
- Staff recommends adopting the final Short Range Transit Plan.

### III. DISCUSSION

METRO received a grant to develop a Short Range Transit Plan (SRTP) and contracted with Wilbur Smith Associates to perform the work. While not a requirement for funding, the Federal Transit Administration and regional planning agencies were looking to the SRTP to justify capital improvements, service changes and grant funding requests. METRO last prepared an SRTP in 1997. Since then, significant changes at METRO warranted a complete update to the plan. The SRTP also provides policy guidance and serves as a reference for METRO decisions regarding services, resources and performance measurements over the course of the next 5 years.

When Wilbur Smith Associates began the SRTP, METRO projected \$1 million per year to be available for additional service. With the economic climate changing drastically while the plan was being produced, there are no new funds on the horizon for expansion.

On July 11, 2008, Wilbur Smith Associates (WSA) presented the draft SRTP to the Board. The proposed plan included a new service delivery model: the Trunk and Feeder Service Option. There were concerns about whether there had been enough public input to warrant such a major change in METRO's fixed-route service. The Board of Directors requested that staff return with a plan to solicit public input.

Staff developed a public outreach program and evaluated the Trunk and Feeder Service Option to determine its feasibility. In the Santa Cruz to Watsonville corridor alone, the Trunk and Feeder Service Option would require a 17% increase in service costing approximately \$850,000 per year. In addition, staff identified new technologies necessary to successfully implement a Trunk and Feeder Service Option.

Staff presented its findings to the Board on December 19, 2008 and recommended removing the Trunk and Feeder Service Option. The Board directed staff to have Wilbur Smith Associates revise the draft SRTP to reflect that the Trunk and Feeder Service Option not be pursued in the five-year planning horizon of the plan and to make no revision to the current service delivery model. The Board also requested that the final SRTP add new information on required technology to make the Trunk and Feeder Service Option possible. Wilbur Smith Associates has now submitted the final Short Range Transit Plan with the requested revisions (Attachment A).

The public hearing provides a forum for input on the final SRTP. Public comments provide the Board additional information in consideration of adopting the Short Range Transit Plan.

Staff recommends adopting the final Short Range Transit Plan.

#### **IV. FINANCIAL CONSIDERATIONS**

There are no financial impacts as this report is to receive and adopt a Short Range Transit Plan with no changes to our current service.

#### **V. ATTACHMENTS**

**Attachment A: Short Range Transit Plan**

Please see enclosed  
FY08 – FY12  
Short Range Transit Plan

2007 - 2008

# Santa Cruz Metro

Short Range Transit Plan



# **SANTA CRUZ METRO**

## **SHORT RANGE TRANSIT PLAN**

DECEMBER 2008

The preparation of this report has been financed in part by the Association of Monterey Bay Area Governments with funding from the United States Department of Transportation, Federal Transit Administration.

# TABLE OF CONTENTS

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## Chapters

- 1 Introduction
- 2 Background
- 3 Goals, Objectives and Standards
- 4 System Evaluation / Current Performance
- 5 Service Improvement Program
- 6 Financial Analysis and Capital Needs
- 7 Addendum

## Appendices

- A History of Metro
- B Fleet Inventory
- C Metro Website Evaluation
- D Outreach Results
- E Financial Tables

# CHAPTER 1: INTRODUCTION

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## OVERVIEW OF PROJECT

The ever changing demographic and economic conditions in Santa Cruz County continually shift the future demands on the transportation infrastructure. Residents' decisions on where to live, work, and recreate and the mode of transportation they choose to make these trips directly impact the transportation needs for the region. As roadway congestion worsens and fuel prices continue to go up, the availability of alternative modes of transportation to the automobile will play a significant role in the future transportation network for Santa Cruz County.

Santa Cruz Regional Transportation Commission (SCRTC) functions as the County's authority for prioritizing major capital improvement projects for the region's transportation needs. These needs are derived from matching anticipated future travel conditions to the available infrastructure to support this travel. RTC's planning process predicts future demands based on current travel behavior and assigns funding accordingly.

Over the past twelve months, Santa Cruz METRO, the regions' public transportation provider, has been working with Wilbur Smith Associates (WSA) to assess the future role for public transportation in the region. This effort involved a thorough assessment of system performance and financial data from the agency as well as a provided a number of different forums for community input and involvement to gain insight on the various needs of each community. This information was brought together to develop METRO's first comprehensive short range transit plan (SRTP) that will be used to help guide future decisions made about METRO's operations.

## PURPOSE OF THE SRTP

The SRTP is a plan used by METRO to help determine the most efficient and effective use of the current and future resources to meet the transit needs for the residents of Santa Cruz County. The plan provides a comprehensive overview of transit operations in the County, establishes service standards to assist policy makers in making critical decisions, and outlines a service plan to focus available resources. The planning horizon for the plan is FY 2008 to FY 2012, focusing on the short-term needs of the agency.

Section one provides an overview of the service, including service area characteristics, the regional transit network, the fleet and facilities of the organization and the organizational structure of the agency. Section two of the SRTP reviews the outreach efforts involved in the development of the plan. Section three of the plan details the goals, objectives, and service standards of the agency. Section four outlines the goals and objectives of METRO and recommended service standards. Section five provides a service improvement plan for the five year planning horizon and section six is the financial plan. Appendices A through I contain supplementary information collected and used during the development of the plan.

## SERVICE AREA CHARACTERISTICS

### Service Area Overview

Santa Cruz County (Figure 2-1) is nearly 450 square miles and home to over 250,000 people. Nearly 50% of the population lives on 5% of the total land in the County. This population can be found in the communities of Santa Cruz, Watsonville, Capitola and Scotts Valley. This concentration of population in urban areas creates a large network of open space and rural areas within the County.

## Santa Cruz

The City of Santa Cruz is the County's largest city and the County's seat. The beach front city is situated on the northern portion of Monterey Bay, making it a prime tourist destination. Highway 1 runs east/west through the city and Highway 17 runs north, providing access to Santa Clara Valley. The city is home to the University of California at Santa Cruz (UCSC).

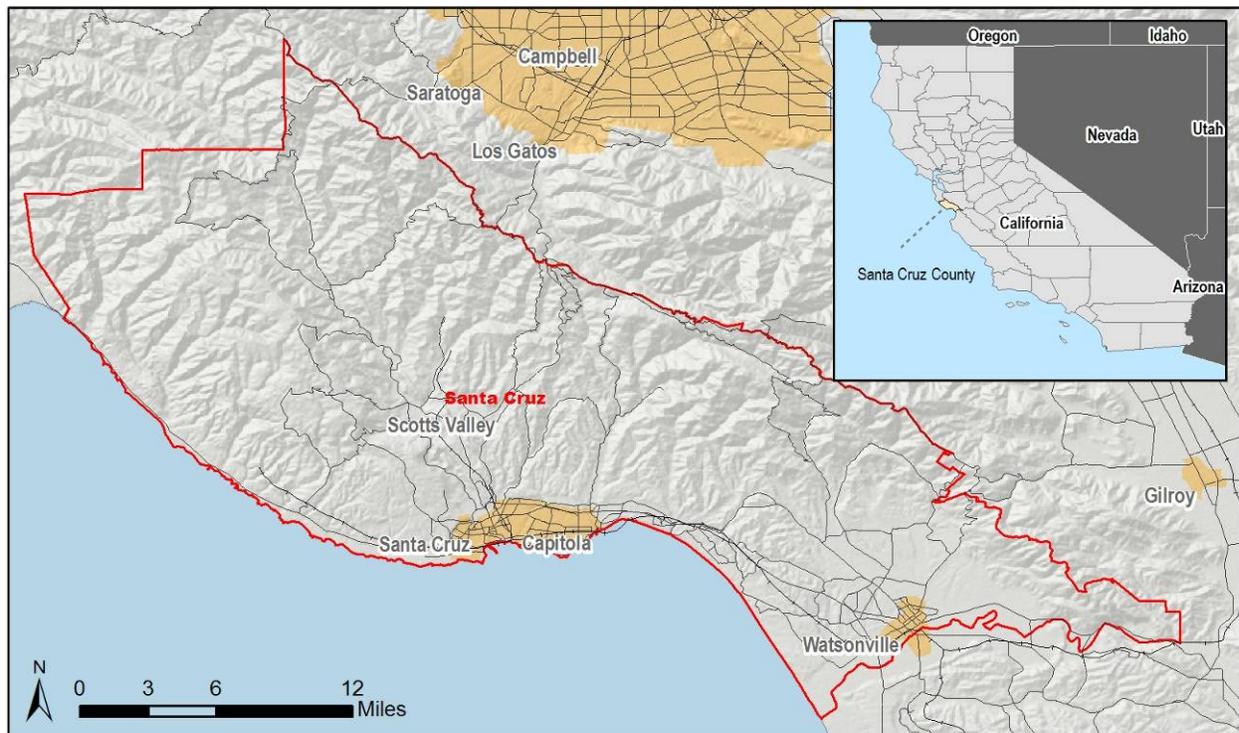
## Watsonville

The City of Watsonville is the second largest city in the County and located on the southeastern corner near Monterey County. The community is a key agricultural community in the region. Watsonville has nearly doubled in population over the past 25 years and is expected to grow to be the largest city in the County by 2015.

## Capitola

Capitola is another tourist town in Santa Cruz County located directly to the east of Santa Cruz. Its proximity to Santa Cruz and the unincorporated areas of Soquel, Aptos and Live Oak create one interconnected urbanized area that is stretched out along Highway 1. The center of activity in the town is located on the beachfront and is referred to as the Capitola Village.

Figure 1- 1: METRO Service Area (Santa Cruz County)



GIS Source: ESRI Data

## Scotts Valley

The city of Scotts Valley is located in the Santa Cruz Mountains between the City of Santa Cruz and the City of San Jose along Highway 17. Its location between these two cities adds both tourism and high-technology to the city's economy.

## San Lorenzo Valley

The San Lorenzo Valley is a region north of the City of Santa Cruz that follows the San Lorenzo River up into the Santa Cruz Mountains. The rural area is home to the towns of Ben Lomond, Felton, Brookdale, and Boulder Creek. The northern end of the Valley is home to Big Basin Redwoods State Park. Highway 9 is the key transportation corridor linking the Valley to the City of Santa Cruz

## UCSC

The University of California at Santa Cruz (UCSC) is one of the ten public collegiate universities in the University of California state school system. The campus is situated on 2,100 acres of rolling, forested hills overlooking the City of Santa Cruz and the Pacific Ocean. Just over 15,000 undergraduate and graduate students attend classes in Arts, Engineering, Humanities, Physical and Biological Sciences, and Social Sciences.

The University's 2005 Long Range Development Plan calls for future growth of an additional 5,100 students and 980 faculty members over the next 15 years. A high percentage of the University's students, and most of its' faculty live off-campus in Santa Cruz and the surrounding communities. This projected growth and off-campus living patterns will likely contribute to an increase of transit demand in the years to come.

## Demographics

Santa Cruz County contains only four incorporated cities; Santa Cruz, Watsonville, Capitola, and Scotts Valley. These cities are located primarily along Highway 1 and border the Pacific Ocean. Only Scotts Valley is located away from this corridor in the Santa Cruz Mountains. Table 2.1 shows how these communities compare in population and size to the rest of Santa Cruz County and the State. Table 1- 2 shows a detailed breakdown of the key demographics of each of these four communities, the county, and the state.

**Table 1- 1: Population and Area Overview**

City	Population	Area (sq.mi.)	Pop. Density (person/sq. mi.)
Santa Cruz	54,593	12.90	4,232.02
Watsonville	44,265	6.00	7,377.50
Capitola	10,033	1.60	6,270.63
Scotts Valley	11,385	4.60	2,473.70
Santa Cruz County	255,602	445.24	122.61
California	33,871,648	155,959.34	217.18

**Source: 2000 US Census**

The Association of Monterey Bay Area Governments serves as the Metropolitan Planning Organization (MPO) for the Counties of Monterey, Santa Cruz and San Benito. As part of its responsibilities, AMBAG provides forecasts for population, housing, and employment for these Counties. This process provides a common planning base for regional and local planning efforts.

Figures 2.2 – 2.4 show AMBAG's 2004 forecasts for the four incorporated cities in Santa Cruz County and the unincorporated regions of the County. The figures show that Watsonville is forecasted to become the largest city in the County, surpassing Santa Cruz by the year 2015. The other areas of the County are expected to experience population growth as well, but the majority is forecasted to occur in Watsonville.

The housing and employment forecasts continue to show higher quantities for Santa Cruz, despite being surpassed in population by Watsonville. Both Santa Cruz and Watsonville show steady growth in these categories with Scotts Valley and Capitola showing slow growth.

Table 1- 2: Service Area Demographic Summary, 2000-2006

	Santa Cruz		Watsonville		Capitola		Scotts Valley		Santa Cruz County		California	
Total Population (2000)	54,593		44,265		10,033		11,385		255,602		33,871,648	
Total Population (2006) estimate	54,778		48,709		9,507		11,150		249,705		36,457,549	
Population change (2000-2006)	+ 0.3%		+10.0%		-5.2%		-2.1%		-2.3%		+7.6%	
<b>Age</b>												
under 5	2,664	4.9%	4,100	9.3%	488	4.9%	774	6.8%	15,544	6.1%	2,486,981	7.3%
Persons under 18 yrs old	9,463	17.3%	15,037	34.0%	1,846	18.4%	2,939	25.8%	60,741	23.8%	9,249,829	27.3%
Persons between 18 and 25	11,188	20.5%	5,244	11.8%	936	9.3%	800	7.0%	30,397	11.9%	3,366,030	9.9%
Persons between 25 and 65	29,279	53.6%	20,182	45.6%	5,831	58.1%	6,073	53.3%	138,977	54.4%	17,660,131	52.1%
Persons 65 years and older	4,663	8.5%	3,802	8.6%	1,420	14.2%	1,573	13.8%	25,487	10.0%	3,595,658	10.6%
Median Age	31.7		27.4		38.4		38.3		35.0		33.3	
<b>Gender</b>												
Female	27,413	50.2%	22,240	50.2%	5,267	52.5%	5,544	48.7%	128,023	50.1%	16,874,892	49.8%
Male	27,180	49.8%	22,025	49.8%	4,766	47.5%	5,841	51.3%	127,579	49.9%	16,996,756	50.2%
<b>Disability</b>												
Persons with a disability, age 5+	7,814	14.3%	8,340		1,619		1,251		37,895		5,923,361	
<b>Journey to Work</b>												
Mean travel time to work (minutes), workers 16+	23		24		28		30		28		28	
<b>Mode to Work</b>												
Car, truck, or van:	21,289	73.5%	14,304	86.1%	4,911	86.2%	4,730	86.9%	105,600	83.7%	12,545,775	86.4%
Public transportation:	2,119	7.3%	484	2.9%	74	1.3%	127	2.3%	4,159	3.3%	736,037	5.1%
Motorcycle	117	0.4%	6	0.0%	25	0.4%	45	0.8%	374	0.3%	36,262	0.2%
Bicycle	1,282	4.4%	258	1.6%	92	1.6%	24	0.4%	2,585	2.0%	120,567	0.8%
Walked	2,343	8.1%	889	5.4%	298	5.2%	224	4.1%	5,599	4.4%	414,581	2.9%
Other means	168	0.6%	405	2.4%	57	1.0%	8	0.1%	1,044	0.8%	115,064	0.8%
Worked at home	1,653	5.7%	258	1.6%	242	4.2%	285	5.2%	6,745	5.3%	557,036	3.8%
<b>Ethnicity</b>												
White	52,137	95.5%	19,036	43.0%	8,412	83.8%	10,090	88.6%	191,931	75.1%	20,170,059	59.5%
Black or African American	945	1.7%	334	0.8%	117	1.2%	55	0.5%	2,477	1.0%	2,263,882	6.7%
American Indian and Alaska Native persons	469	0.9%	768	1.7%	57	0.6%	46	0.4%	2,461	1.0%	333,346	1.0%
Asian persons	2,677	4.9%	1,455	3.3%	401	4.0%	526	4.6%	8,789	3.4%	3,697,513	10.9%
Native Hawaiian and Other Pacific Islander persons	72	0.1%	53	0.1%	20	0.2%	21	0.2%	382	0.1%	116,961	0.3%
Persons reporting some other race	4,990	9.1%	20,328	45.9%	555	5.5%	245	2.2%	38,391	15.0%	5,682,241	16.8%
Persons reporting two or more races	2,456	4.5%	2,291	5.2%	471	4.7%	402	3.5%	11,171	4.4%	1,607,646	4.7%
Hispanic or Latino (of any race)	9,491	17.4%	33,254	75.1%	1,267	12.6%	729	6.4%	68,486	26.8%	10,966,566	32.4%
<b>Language and Education</b>												
Language other than English spoken at Home, % age 5+	22.3%		70.7%		17.6%		12.2%		27.8%		39.5%	
High school graduates, % of persons age 25+	89.1%		49.1%		91.3%		94.8%		83.2%		76.8%	
Bachelor's degree or higher, % of persons age 25+	44.4%		8.7%		34.6%		40.9%		34.2%		26.6%	
<b>Housing</b>												
Housing Units	21,504		11,695		5,309		4,423		98,873		12,214,549	
Homeownership rate	46.6%		48.1%		88.4%		74.9%		60.0%		56.9%	
Households	20,442		11,381		4,692		4,273		91,139		11,502,870	
Persons per household	2.44		3.84		2.11		2.56		2.71		2.87	
Owner-occupied	2.51		3.55		2.10		2.66		2.71		2.93	
Renter-occupied	2.39		4.11		2.11		2.27		2.70		2.79	
Median household income	\$50,605		\$37,619		\$46,048		\$2,449		\$53,998		\$47,493	
Individuals below poverty, % of pop	16.5%		19.1%		7.0%		2.5%		11.9%		14.2%	
Per capita income	\$25,758		\$13,205		\$27,609		\$35,684		\$26,396		\$ 22,711	

Source: 2000 US Census

Figure 1- 2: AMBAG Population Forecasts (2000-2030)

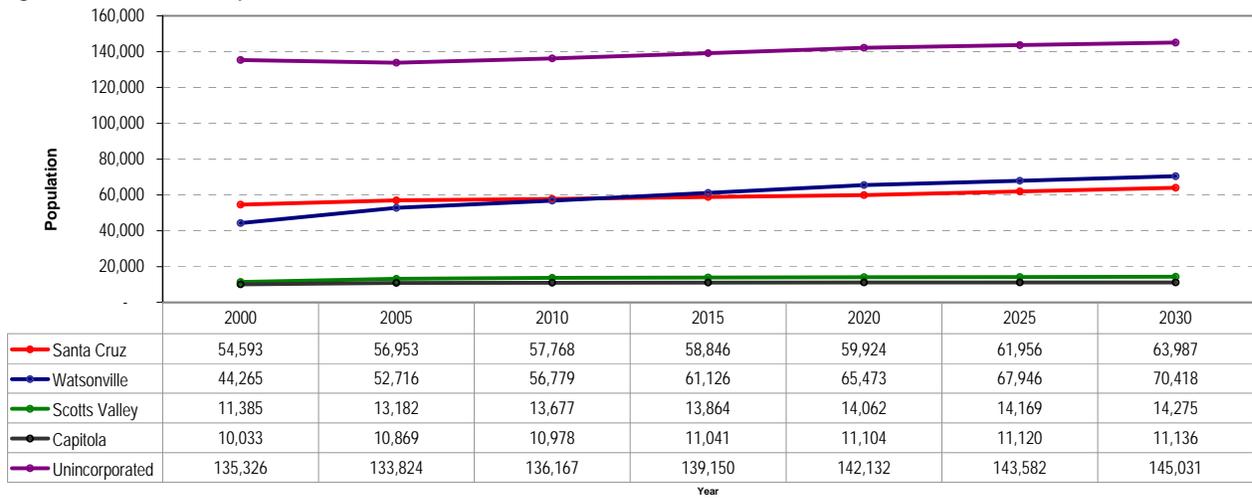


Figure 1- 3: AMBAG Housing Forecast (2000-2030)

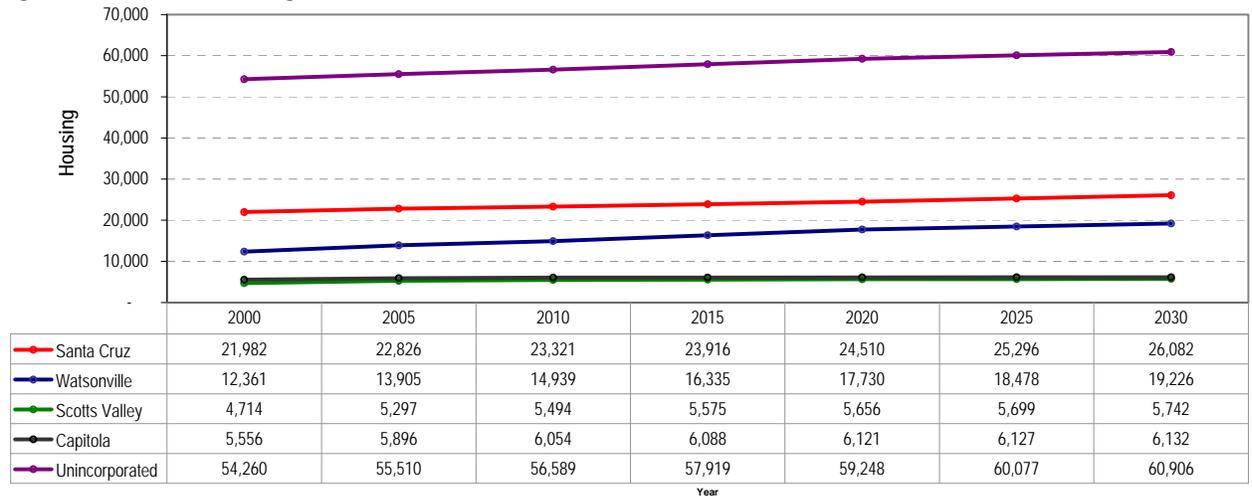
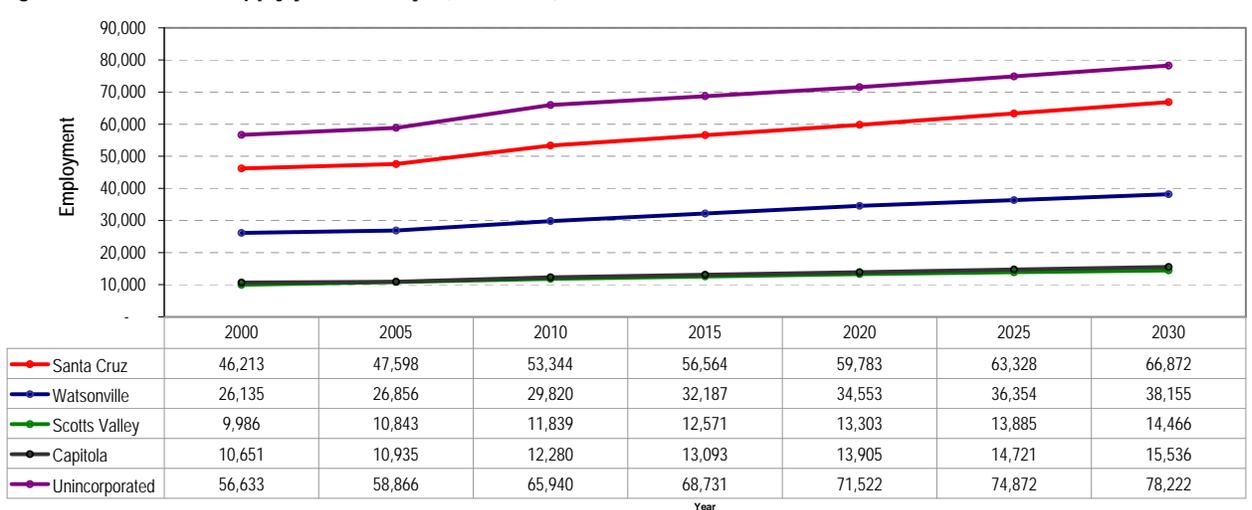


Figure 1- 4: AMBAG Employment Forecast (2000-2030)



## Economic Condition

Santa Cruz County has a strong economic base which is structured around agriculture, tourism and retail trades. The unemployment rates (Table 2-3) for the County are widely variable. The City of Santa Cruz is just under the statewide average, Watsonville is nearly twice the state average and Capitola and Scotts Valley are nearly half of the state average. Clearly, there is a rather significant variance between the four incorporated cities.

Table 1- 3: 2000 Unemployment Summary

City	Unemployment (pop 16+)
Santa Cruz	4.2%
Watsonville	7.9%
Capitola	2.1%
Scotts Valley	1.7%
Santa Cruz County	4.1%
California	4.3%

Source: 2000 US Census

The various employment categories and the number of employees employed in each profession are broken down for the various geographic regions and shown in Table 1- 4. These results show the region's economic dependence on tourism and agriculture and the rather unbalanced employment distribution when compared with the statewide distribution.

Table 1- 4: Employment Summary

	Santa Cruz		Watsonville		Capitola		Scotts Valley		Santa Cruz County		California	
Retail trade	3,608	19%	2,389	20%	2,809	47%	914	16%	12,714	20%	1,525,113	12%
Health care & social assistance	2,216	12%	2,110	17%	312	5%	435	7%	10,404	17%	1,434,479	11%
Accommodation & food services	4,036	21%	1,146	9%	1,496	25%	704	12%	10,060	16%	1,145,536	9%
Manufacturing & Agriculture	1,833	10%	2,801	23%	-	0%	631	11%	6,694	11%	1,616,504	13%
Wholesale trade	1,300	7%	1,471	12%	64	1%	681	12%	5,025	8%	811,344	6%
Professional, scientific, & technical services	1,917	10%	420	3%	60	1%	963	16%	4,701	8%	1,164,306	9%
Administrative & support & waste management & remediation service	440	2%	752	6%	433	7%	388	7%	3,247	5%	1,013,925	8%
Other services (except public administration)	1,097	6%	400	3%	236	4%	156	3%	3,021	5%	405,030	3%
Information	1,040	5%	233	2%	82	1%	782	13%	2,464	4%	563,841	4%
Real estate & rental & leasing	454	2%	268	2%	274	5%	148	3%	1,766	3%	273,899	2%
Arts, entertainment, & recreation	1,098	6%	156	1%	175	3%	60	1%	2,023	3%	287,157	2%
Educational services	170	1%	60	0%	60	1%	10	0%	417	1%	62,843	0%
Mining	-	0%	-	0%	-	0%	-	0%	-	0%	20,321	0%
Utilities	-	0%	-	0%	-	0%	-	0%	-	0%	57,461	0%
Construction	-	0%	-	0%	-	0%	-	0%	-	0%	870,334	7%
Transportation & Warehousing	-	0%	-	0%	-	0%	-	0%	-	0%	397,266	3%
Finance & insurance	-	0%	-	0%	-	0%	-	0%	-	0%	681,626	5%
Management of companies & enterprises	-	0%	-	0%	-	0%	-	0%	-	0%	267,738	2%
<b>Total</b>	<b>19,209</b>	<b>100%</b>	<b>12,206</b>	<b>100%</b>	<b>6,001</b>	<b>100%</b>	<b>5,872</b>	<b>100%</b>	<b>62,536</b>	<b>100%</b>	<b>12,598,723</b>	<b>100%</b>

Source: 2000 US Census

## Services Provided

The Santa Cruz Metropolitan Transit District (METRO) is the fixed route and paratransit service provider for Santa Cruz County. Appendix A contains a summary of the history of the organization. A total of 39 routes are offered throughout Santa Cruz County and one regional service is offered into Santa Clara County. ADA paratransit is provided within  $\frac{3}{4}$  miles from any of METRO's fixed route services. These service areas are shown below in Figure 2-5.

Figure 1- 5: Fixed Route and Paratransit Service Area



## Fixed Route

Five types of fixed route services are provided to meet the various bus needs of the residents of Santa Cruz County as shown in Table 1- 5 below. These categories were developed based on the differences in markets each type of route services and the differences in services frequencies/spans of service. Table 1- 6 and 2-7 show a breakdown of the frequencies and span of services for each route by category.

Table 1- 5: Fixed Route Classifications

Route Type	Description	Route Numbers
Rural	Lifeline service outside urban boundaries	33, 34, 40, 41, 42, 72, 76
Local / Feeder	Urban routes which connect residential areas or major trip generators with transit centers	3, 4, 7, 9, 31, 32, 53, 54, 55, 56, 66, 68, 74, 75, 79, 88
Intercity	Primary trunk lines with better than hourly service on arterial roads linking transit center or significant activity centers	35, 69, 69A, 69W, 69N, 70, 71, 91
UCSC	Routes that connect to the UCSC campus	10, 12, 13, 15, 16, 19, 20
Regional	Routes that travel beyond Santa Cruz County	17

**Rural Routes:** Rural routes provide service to rural areas of County in the Santa Cruz Mountains and outside Watsonville. These areas include the communities in the San Lorenzo Valley and Corralitos. Frequencies and span of service tends to be the lowest systemwide on these routes.

**Local / Feeder Routes:** These routes are designed to provide bus service within the urban communities of the County. Frequencies and span of services tend to be higher than rural routes but lower than intercity and UCSC. The majority of these routes serve the cities of Santa Cruz and Watsonville.

**Intercity:** Intercity routes are primarily focused on meeting the bus rider demands between the urban areas within the County including the Santa Cruz to Watsonville corridor and Santa Cruz to Scotts Valley corridor. A variety of service options (local stop to express) between Santa Cruz and Watsonville are offered to meet the various travel needs along the Highway 1 corridor. Intercity routes tend to have high service frequencies and high span of services.

**UCSC:** Due to the high transit demands to the University of Santa Cruz, routes have been specially structured and assigned their own category of fixed routes service. The majority of these services are only offered during the University's school term and are not in service during the summer months. The UCSC routes tend to have the highest ridership and productivity and experience a strong demand for bicycles. As a result, these routes tend to be the most frequent and have the longest running spans of service in the system.

**Regional:** There is one regional route which provides service between Santa Cruz County and Santa Clara County along SR-17. This service connects the Downtown Santa Cruz METRO station with San Jose's Diridon station servicing various park and ride lots and the Cavallaro Transit Center in Scotts Valley. At Diridon station, passengers can connect to the Santa Clara Valley Transportation Authority's (VTA) transit system the Caltrain and Amtrak regional rail systems. Once at Diridon, transit passenger can connect to the San Jose airport using the VTA system.

Table 1- 6: 2007 Weekday Service Headways and Span of Services

Route	AM Peak	Midday	PM Peak	Evening	Start Time	End Time	Span of Service
	to 8:29	8:30-14:29	14:30-17:59	18:00 to			
<b>Rural</b>							
33*	Limited Service, Trips Per Day = 2				6:55	15:18	1:00
34*	Limited Service, Trips Per Day = 2				7:25	15:05	1:00
40	Limited Service, Trips Per Day = 3				6:15	16:50	3:00
41	Limited Service, Trips Per Day = 4				6:05	18:50	6:00
42	Limited Service, Trips Per Day = 3				12:30	23:25	4:00
72/76	60	60	60	60	5:40	19:38	14:00
<b>Local / Feeder</b>							
3	60	60	60	60	6:50	19:28	13:00
4	60	60	60	60	6:45	17:25	11:00
7	60	60	60	60	8:50	18:18	10:00
9			Limited Service, Trips Per Day = 2		7:35	14:57	1:00
31	30		60		6:55	17:13	5:00
32		Limited Service, Trips Per Day = 2			14:15	15:50	1:00
53		120	120		9:05	17:55	4:00
54	Limited Service, Trips Per Day = 2				7:05	19:00	1:00
55	60	60	60		7:30	17:25	10:00
56	120	120	120		8:05	17:00	5:00
66	25-60	60	60	60-80	6:15	23:05	16:00
68	60	60	60	60	6:30	19:20	12:00
68N				60	18:30	23:30	5:00
74	60	60	60		6:50	18:35	12:00
75	60	60	60	60	6:09	21:02	15:00
79	60	60	60		7:10	17:35	11:00
88***	Limited Service, Trips Per Day = 4				6:05	18:35	3:00
<b>Intercity</b>							
35	3-41	30	30	28-75	5:53	23:45	18:00
35A	30	30	30	25-75	6:30	<i>0:08</i>	17:30
69	30-70	30	30	30	6:05	18:40	13:00
69A	60	60	60	60	6:45	19:48	13:00
69W	60	60	60	60	6:20	19:37	13:00
69N				30	19:00	22:20	3:00
70*	30	30	30		7:30	15:40	7:00
71	30	15-30	15	30-60	5:40	<i>0:45</i>	18:00
91	15-60	60	60	60	6:00	18:16	6:00
<b>UCSC</b>							
10	30	30	30	30	6:55	19:05	12:00
12*	Limited Service, Trips Per Day = 1				7:10	8:07	1:00
13*	60	60	60	60	7:20	19:07	12:00
15*	14-28	6-53	3-30	9-41	7:38	19:43	12:00
16	30	5-30	3-30	15-30	6:25	<i>2:14</i>	20:00
19*	30	30	30	30	7:30	<i>0:11</i>	17:00
19N**				40	23:45	<i>3:14</i>	4:00
20/20D	60	30-60	20-60	30	7:20	21:45	14:00
<b>Regional</b>							
17	15-40	60-100	20-60	60-90	4:35	23:30	17:00

\* Route does not provide service or provides limited service when school (UCSC, Cabrillo, or San Lorenzo Valley) is not in service

\*\* Friday-Saturday Service

\*\*\* Formerly Named 7N

\*\*\*\* Service Operates Mid-November Through Mid-April Only

Red italic text indicates AM time for the following day

 : Limited Service Times  
 : No Service Times

Table 1- 7: 2007 Weekend Service Headways and Span of Services

Route	AM Peak	Midday	PM Peak	Evening	Start Time	End Time	Span of Service
	to 8:29	8:30-14:29	14:30-17:59	18:00-21:59			
<b>Rural</b>							
33*							0:00
34*							0:00
40		Limited Service, Trips Per Day = 2			8:30	17:55	3:00
41			Limited Service, Trips Per Day = 1		9:30	10:50	1:00
42		Limited Service, Trips Per Day = 3			12:30	23:25	4:00
72/76	60	60	60		6:40	18:40	12:00
<b>Local / Feeder</b>							
3							0:00
4							0:00
7							0:00
9							0:00
31							0:00
32							0:00
53							0:00
54	120	120	120	120	7:30	19:00	9:00
55							0:00
56							0:00
66	60	60	60	60-80	7:00	23:05	16:00
68		60	60	60	8:30	19:20	10:00
68N				60	18:30	23:30	5:00
74							0:00
75	60	60	60	60	6:09	21:02	15:00
79							0:00
88****		Limited Service, Trips Per Day = 4			6:05	18:35	3:00
<b>Intercity</b>							
35	60	30-60	30	30-71	7:02	23:21	16:00
35A*	60	30-60	30	30-90	7:30	<i>0:08</i>	16:00
69		Limited Service, Trips Per Day = 1			7:37	8:18	1:00
69A	60	60	60	60	7:50	19:48	11:00
69W		60	60	60	8:37	21:34	13:00
69N							0:00
70*							0:00
71	30	30	30	30-60	6:05	22:30	17:00
91		Limited Service, Trips Per Day = 1			7:15	8:01	0:46
<b>UCSC</b>							
10	60	60	60	60	8:25	18:00	10:00
12*							0:00
13*							0:00
15*							0:00
16	60	15-60	15-30	15-45	7:05	<i>3:15</i>	20:00
19*		60	60	60	9:30	19:11	10:00
19N**				40	23:45	<i>3:14</i>	4:00
20/20D		60	60	60	8:20	21:15	13:00
<b>Regional</b>							
17	85-95	100	75-135	80-95	5:50	23:40	10:00

\* Route does not provide service or provides limited service when school (UCSC, Cabrillo, or San Lorenzo Valley) is not in service

\*\* Friday-Saturday Service

\*\*\* Formerly Named 7N

\*\*\*\* Service Operates Mid-November Through Mid-April Only

*Red italic text indicates AM time for the following day*

*0:08* : Limited Service Times

*3:15* : No Service Times

## ParaCruz

ParaCruz is the public transportation system for seniors or the disabled who are unable to use the fixed route transit service. The service is compliant with the American with Disabilities Act of 1990 and services areas within a  $\frac{3}{4}$  mile buffer of the fixed route service offered by METRO. Those registered in the program are eligible for shared ride, door-to-door pick up service from 6:00 AM until 10:30 PM every day except New Year's Day, Thanksgiving, and Christmas Day. Trips must be booked between 1-14 days in advance between the hours of 8:00 AM and 5:00 PM. Following completion of a reservation, customers are given a "ready window" of 30 minutes (10 minutes before and 20 minutes after) their requested time. The cost is \$3.00 per trip, twice the price of the regular fixed route fare.

METRO took over the paratransit service from Community Bridges (private contractor) in November of 2004. Minibus vehicles are used for the service which can accommodate wheelchairs and scooters less than 30" by 48" and less than 600 pounds when occupied.

## Neighboring Services

### Monterey Salinas Transit (MST)

Monterey-Salinas Transit (MST) is the fixed route and paratransit service provider for Monterey County. MST operates a total of 33 fixed-route services, providing service within  $\frac{3}{4}$  of a mile to an estimated 352,000 people. The service is structured to provide local and intercity service for Monterey Peninsula and Salinas Valley and rural services to the Carmel Valley, Big Sur, and coastal regions of the Monterey Peninsula. MST also runs service inland along the Highway 101 corridor to the cities of Chular, Gonzales, Greenfield, Soledad, and King City.

Major transit centers within the MST system are located in the Cities of Monterey, Salinas, Seaside, Marina, and Watsonville. The Watsonville Transit Center, opened in 1995, provides transferring service to Santa Cruz METRO bus lines. MST Routes 27, 28, and 29 that service the Watsonville Transit Center allow METRO riders to make direct transfers on to Salinas, Castroville and Marina. Transfers can then be made at either the Marina or Salinas Transit center for continued service to the rest of Monterey County.

MST offers free transfers to METRO routes for the travel to the North Zone<sup>1</sup> only. Transfers must be requested at time of payment for METRO fare and are not available at the Watsonville Transit Center. Day passes are also good for unlimited travel in the MST North Zone but METRO monthly pass holders must be accompanied by a transfer. METRO also accepts MST's Courtesy Cards (senior and disabled passes) giving riders a discounted fare. MST accepts METRO's senior rate payment even though the senior age is less than their own.

A memorandum of understanding signed in 1989 by MST and METRO outlines a plan for both agencies to provide coordinated and efficient transit service to transit riders of Watsonville and the Pajaro Valley. Aside from fare arrangements mentioned above, the agreement also calls for MST and METRO staff to assist in directing passenger between the two systems and providing each others information in the respective rider guides.

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<sup>1</sup> North Zone includes the communities of Watsonville, Marina, Prunedale, and Castroville.

## Santa Clara Valley Transportation Authority (VTA)

Valley Transit Authority (VTA) provides bus, light-rail, paratransit and various shuttle services to the Santa Clara County. Sixty-nine fixed-route bus services and three rail lines link the major communities including Mountain View, Sunnyvale, San Jose, Milpitas, Morgan Hill, and Gilroy.

METRO's Highway 17 Express service provides Santa Cruz and Santa Clara County residents with "over-the-hill" service between the two counties. Northbound passengers from Santa Cruz County can connect to VTA lines at either the Diridon Station or the Downtown Transit Plaza in San Jose. Since both of these locations serve as major transit terminals in the area, passengers have a number of options for bus, light rail and shuttle connections to most of Santa Clara County. The free Downtown DASH circulator shuttle is available at both of these locations as well.

Fares paid into the METRO system for the Highway 17 bus results in free transfer to VTA system, but not the reverse to METRO from VTA. A single ride is \$4, day pass \$8 and monthly pass is \$90.

## Altamonte Commuter Express (ACE)

The Altamonte Commuter Express is a regional commuter rail system linking the Central Valley, Livermore/Amador Valley, and Santa Clara County. Four AM westbound and four PM eastbound trains provide commuters from the communities of Stockton, Lathrop, Manteca, Tracy, Livermore, Pleasanton, and Fremont connections to the major employment destination in the Silicon Valley. The final stop along the corridor is the Diridon Station in San Jose, allowing connections to the Highway 17 Express from Santa Cruz County.

Transfers at the Diridon Station to ACE are not timed with the Highway 17 Express and discounted fare transfer rates are not available.

## Caltrain

Caltrain provides commuter rail service to 34 stations along a 77-mile corridor from San Francisco, through San Mateo and Santa Clara Counties to Gilroy. As of April 2<sup>nd</sup>, 2007, 96 trains provide weekday northbound and southbound service. Along with the regular all-stop service, a limited stop and baby bullet option are available to commuters. The baby bullet allows travel to occur between San Francisco and San Jose in less than an hour.

Caltrain services the Diridon Station in San Jose where the Highway 17 Express service from Santa Cruz stops. This location allows passengers a train connection to San Francisco and San Mateo Counties (northbound) or Morgan Hill/Gilroy (southbound). Persons boarding with a Caltrain monthly ticket and Peninsula pass receive \$4.50 credit towards a purchase of a HWY 17 day pass.

## Amtrak

Amtrak's Capitol Corridor service from Sacramento to San Jose is accessible via the Highway 17 Express. This commuter rail system provides service seven days a week to major destination in the East Bay and Sacramento Valley including Oakland, Berkeley, Martinez, Davis, Sacramento, and Auburn. Amtrak also provides motorcoach service from the Diridon Station south to San Luis Obispo and Santa Barbara.

## Organizational Structure

The organization structure for METRO is shown below in Figures 2- 6 to 2- 15. Nine major departments exist within this structure that is overseen by the Board of Directors:

- Office of the General Manager
- District Counsel

- Finance Department
- Human Resources Department
- Operations Department
- Maintenance Department
- Information Technology Department
- Fleet Department
- Facilities Department

Figure 1- 6: METRO Organizational Chart - All Departments

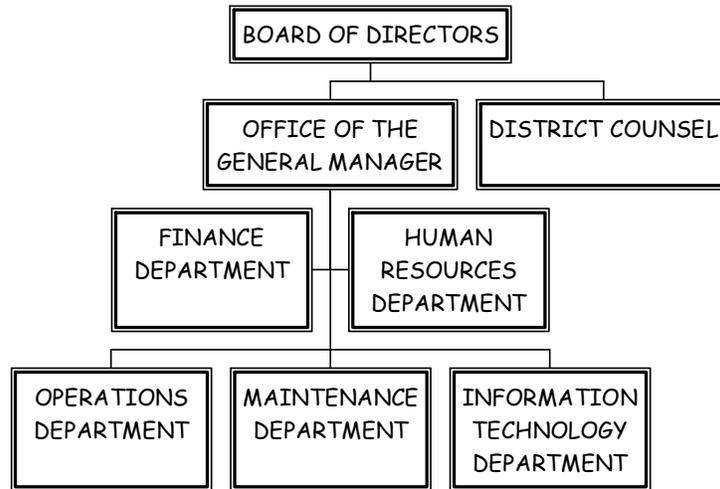


Figure 1- 7: METRO Organizational Chart - Office of the General Manager

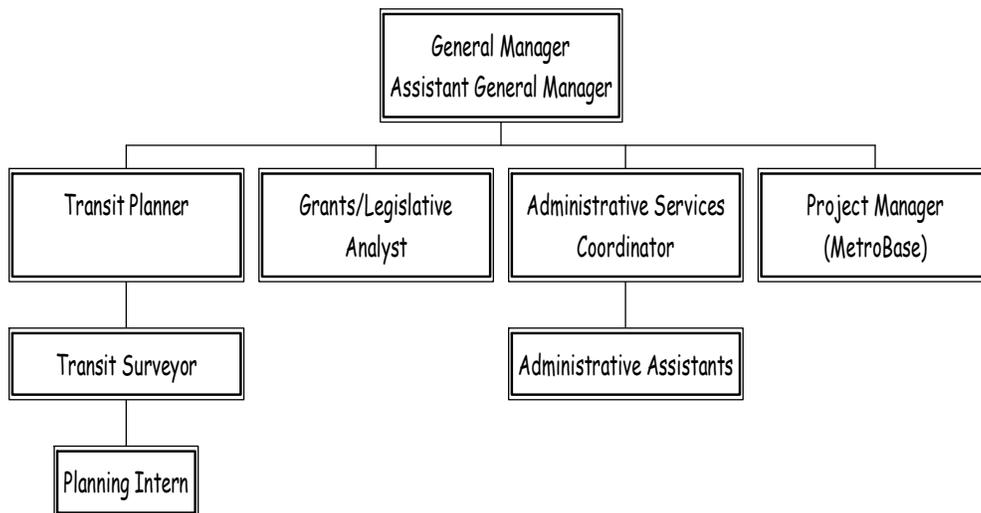


Figure 1- 8: METRO Organizational Chart – Office of District Counsel

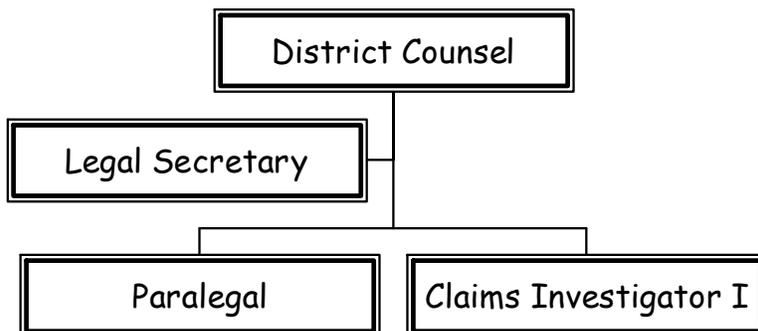


Figure 1- 9: METRO Organizational Chart – Office of Finance

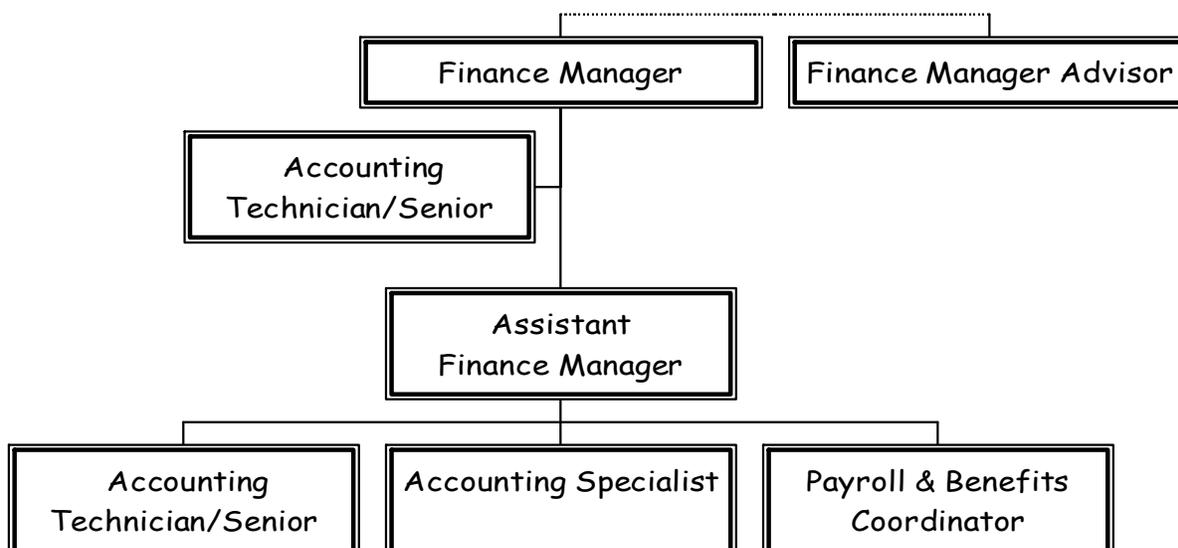


Figure 1- 10: METRO Organizational Chart – Human Resources Department

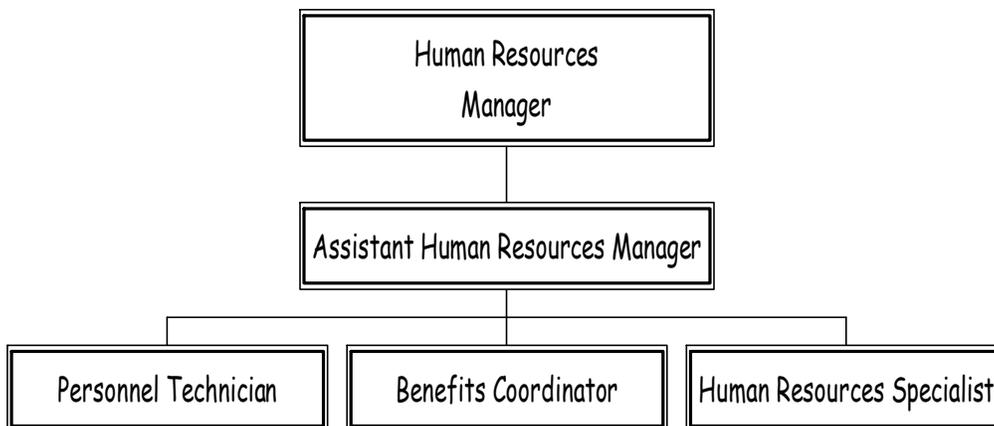


Figure 1- 11: METRO Organizational Chart – Information Technology Department

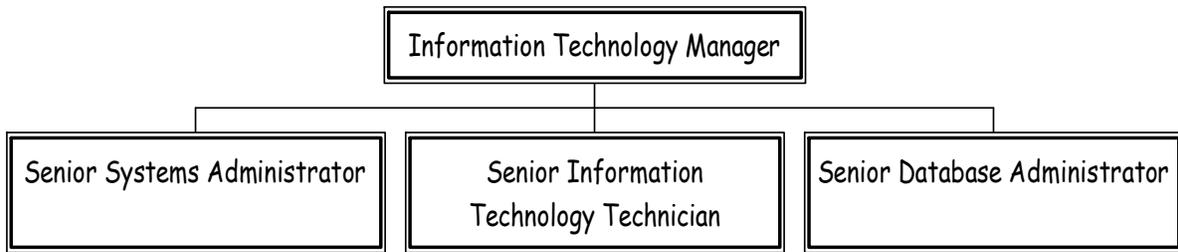


Figure 1- 12: METRO Organizational Chart – Operations Department

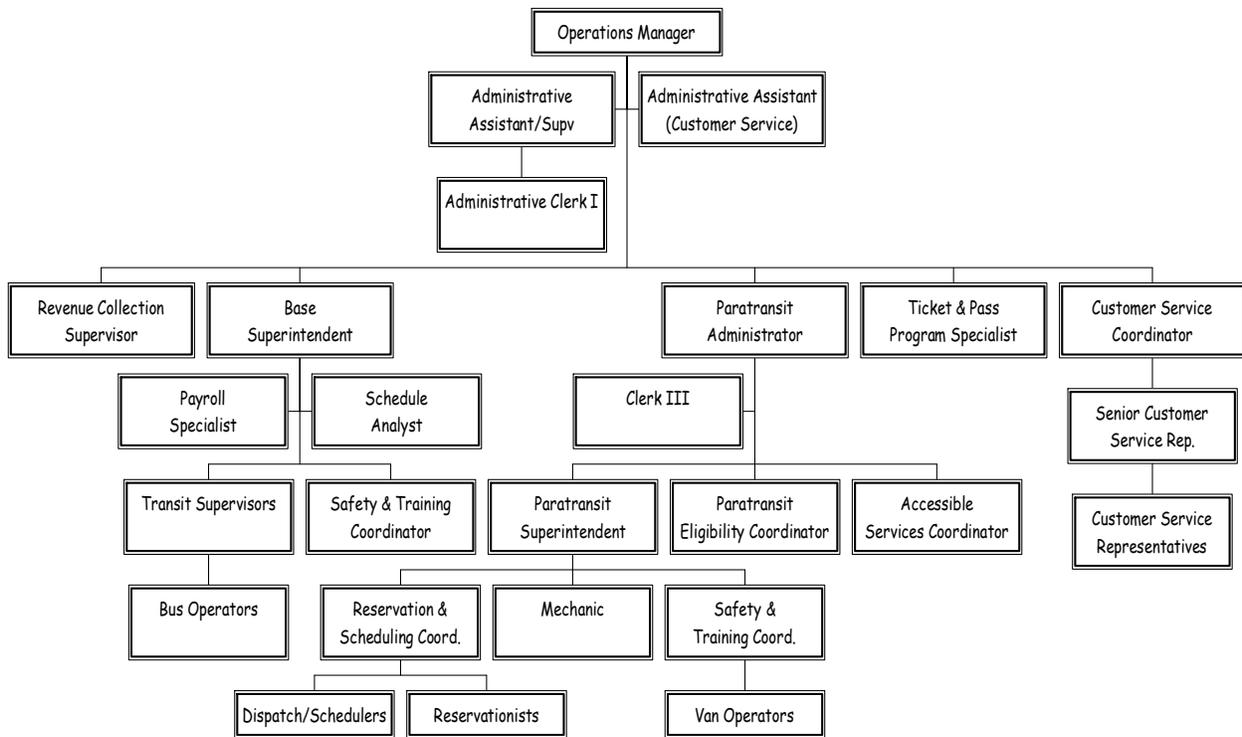


Figure 1- 13: METRO Organizational Chart – Maintenance Department

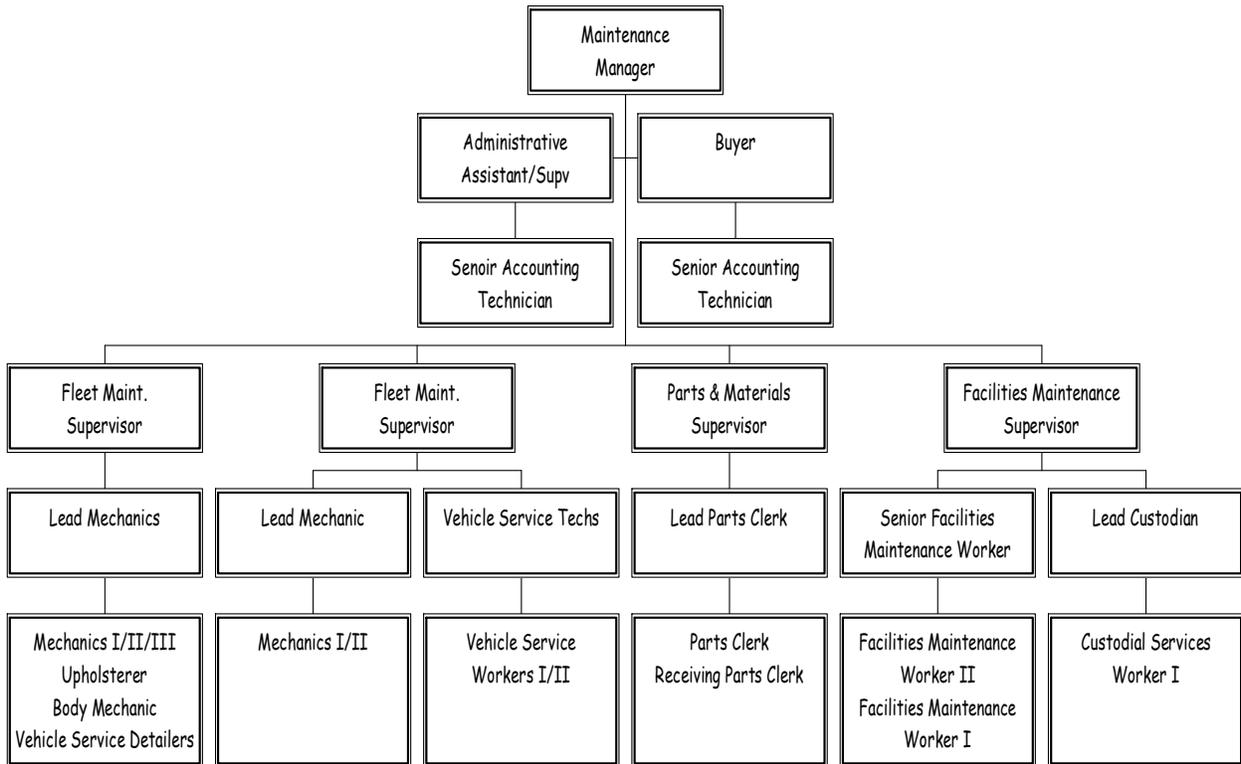


Figure 1- 14: METRO Organizational Chart – Fleet Department

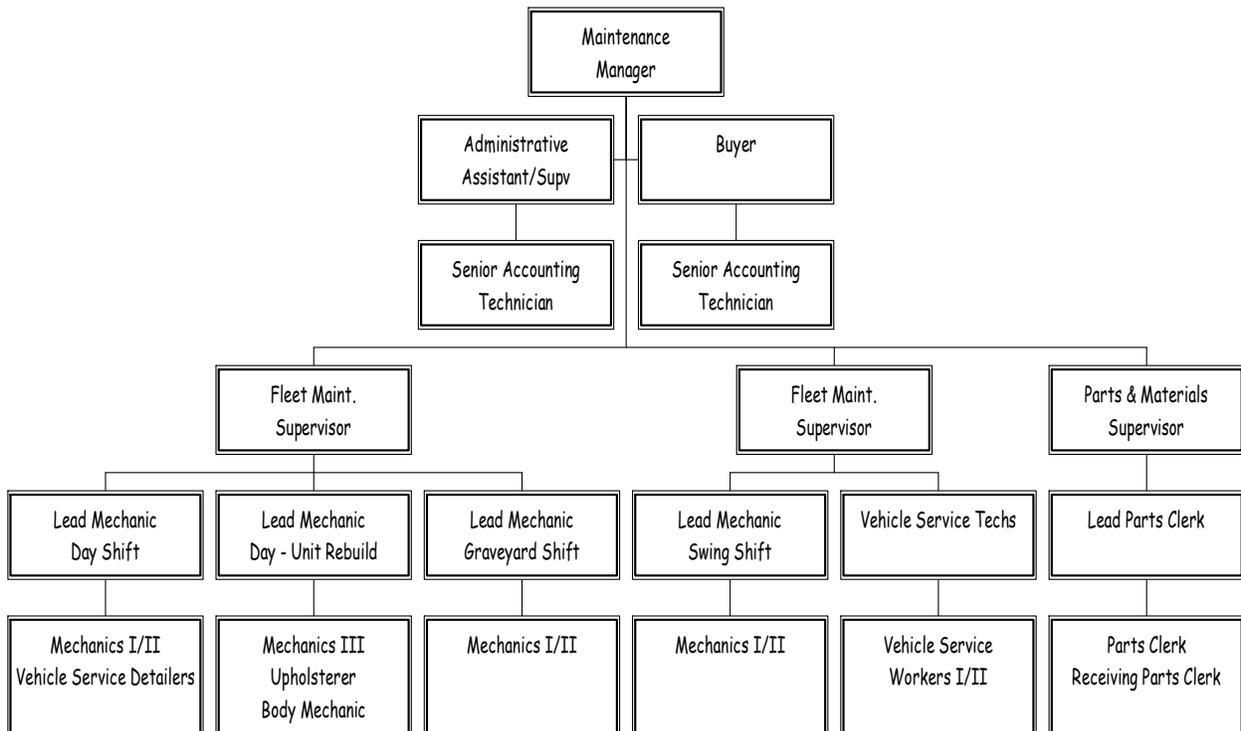
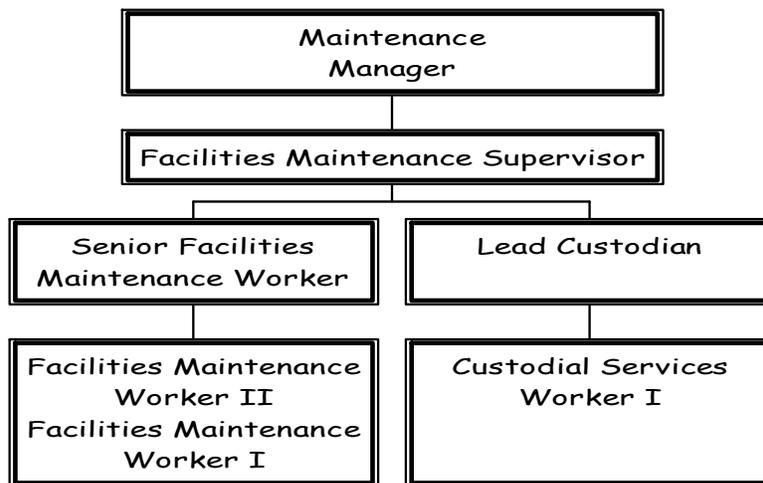


Figure 1- 15: METRO Organizational Chart – Facilities Department



## Fare Structure

The fixed route fare structures shown in Table 1- 8 below were effective as of July 1, 2004. Fares for the Highway 17 Express Service to Santa Clara County are shown in Table 1- 9. Paratransit fares are priced as twice the normal fixed-route cash fare, \$3.00 per trip.

Transfers between METRO buses are not free and require repayment for every bus boarded. Those making more than three trips in one day are encouraged to buy a day pass for \$4.50 which will result in a cost savings for the rider. Free transfers are issued for those traveling to the North Zone areas of the Monterey-Salinas Transit area. Transfers to this service must be issued when the initial bus fare is paid and monthly passes are not honored by MST.

Monthly adult, youth, and senior/disabled passes are good for unlimited rides on all routes in Santa Cruz County except the Highway 17 Express. To qualify as a senior, riders must be 62 or older and be able to show proof of age. To qualify as disabled, riders must provide a METRO ID card or Medicare card. The Highway 17 Express monthly pass is good for unlimited rides on all METRO's fixed route services and Santa Clara buses and light rail.

METRO currently has agreements with the University of California Santa Cruz (UCSC) and Cabrillo College to offer students and staff free transit service. Students and staff must present a valid identification card for their respective college or university at the time of boarding to use the free service. This "class pass" program eliminates the charge to the rider at the time of boarding but eventually reimburses METRO at a subsidized per trip rate as described in the agreement.

Table 1- 8: 2007 Fixed Route Fares

	Cash	Day Pass	5 Day Pass	Monthly Pass
<b>Cash</b>	\$1.50	\$4.50	\$22.00	\$50.00
<b>Student</b> above 46" or through the 12th grade	\$1.50	\$4.50	\$22.00	\$35.00
<b>Child</b> less than 46" (three ride free with fare paying passenger)	Free	N.A.	N.A.	N.A.
<b>Senior</b> 62 + years	\$0.75	\$2.25	\$11.25	\$25.00
<b>Disabled</b>	\$0.75	\$2.25	\$11.25	\$25.00

Table 1- 9: 2007 Highway 17 Express Fares

	Cash	Day Pass	Monthly Pass
<b>Cash</b>	\$4.00	\$8.00	\$90.00
<b>Senior</b> 62 + years	\$2.00	N.A.	N.A.
<b>Disabled</b>	\$2.00	N.A.	N.A.

## Fleet

As of November of 2006, METRO had 113 revenue vehicles for fixed route services, 34 vehicles for paratransit services, and 61 non-revenue vehicles. Nearly all fixed route vehicles are 35 or 40 foot in length. Revenue vehicles have an average age of 10 years, paratransit 5.2 years, and non-revenue 7.8 years. A complete listing of these vehicles is shown in Appendix B.

## Facilities

Four transit centers are currently used by METRO as hub or transfer locations for their fixed routes services. The two primary centers, which nearly all routes service, are the Santa Cruz Transit Center located in Downtown Santa Cruz and the Watsonville Transit Center located in Downtown Watsonville. Both of these facilities contain a large number of bus bays to allow layover and transferring activities to occur. They also include a high level of customer amenities including food vendors, customer service agents, and seating.

The secondary transit centers are located in Felton and Capitola. The Felton center is located at Felton Faire just north of Mt. Hermon Road. The Capitola Transit Center is located at the Capitola Mall on 41<sup>st</sup> Street. Both of these facilities have fewer customer amenities but provide key transfer points for METRO's fixed routes services.

The District is also in the process of constructing the new MetroBase Transit facility on River Street and Golf Course Drive. The new facility will be the central location for operations and maintenance of METRO's bus fleet. The facility will contain the following components:

- Liquefied Compression Natural Gas (LCNG) fueling station

- Bus washing structure
- A second story addition to the current building
- Reconfigured parking and circulation

Completion of the facility is scheduled for 2010.

## Website

The District currently offers a website dedicated to providing transit information to the residents of Santa Cruz County. The website is also a medium for obtaining citizen feedback on the current service offered by METRO. The major information areas on the page include; System Information, Schedules, Contact Us, News, Board, Bids, Jobs, Links, MetroBase, and ParaCruz. METRO's website has been in existence since 1996 and is currently being reevaluated to determine changes that will meet the needs of their current users. This assessment can be found in Appendix C of this report.

# CHAPTER 2: BACKGROUND

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## BACKGROUND REPORTS

The following studies were reviewed in the SRTP development process. These documents address issues that directly or indirectly effect operations at METRO and in some way impact the operational conditions. The documents reviewed include:

- Regional Transportation Plan (2005) - Santa Cruz Regional Transportation Commission (RTC)
- Metropolitan Transportation Plan (MTP) (2005) – Association of Monterey Bay Area Governments (AMBAG)
- City of Santa Cruz Master Transportation Study (2003) - Fukuji Planning & Design
- ADA Complementary Paratransit Comprehensive Operational and Financial Audit (2000)- Multisystems
- UCSC Comprehensive Transit Study (2003) – Urbitran
- UCSC Long Range Development Plan (2005-2020) - University of Santa Cruz
- Major Transportation Investment Study (1997) – Santa Cruz Regional Transportation Commission

### Regional Transportation Plan (2005)

The RTC is the transportation planning agency for Santa Cruz County that is primarily responsible for prioritizing capital investments in transportation infrastructure for all modes of transportation including autos, transit, bikes and pedestrians. The RTP is the long range planning document mandated by the state of California to guide transportation funding decision for the planning region. The 2005 plan identifies goals, projects and programs that will improve and maintain the County’s transportation system over the next 25 years. The plan further identifies specific projects to meet these goals.

The overall theme that developed in the plan focused on the increasing traffic congestion and the increasing competition for limited transportation dollars. A number of key points were highlighted, including:

- Santa Cruz County has a rich multi-modal transportation network
- Traffic in Santa Cruz is worsening
- Transit service is limited by available revenues
- Maintenance needs for the existing transportation network are increasing
- The complexity of transportation solutions is increasing
- All transportation modes and facilities are subsidized with public funding generated from tax revenues
- Since 1998 the RTC has gained more control of the local share of state and federal funds
- The ebb and flow of federal, regional and local funding affects project timing
- Existing funds are insufficient
- Reaching consensus on transportation improvements is difficult

## Metropolitan Transportation Plan (2005) - AMBAG

AMBAG is the metropolitan planning organization (MPO) for the three-county Monterey Bay region including Santa Cruz County, Monterey County and San Benito County. Federal regulations requires AMBAG to develop a long-range transportation plan that is both financially constrained and falls under the on-road motor vehicle emissions budget included in the Federal Air Quality Maintenance Plan. The plan provides the financial element which demonstrates how various transportation improvement projects can be implemented with the region's available resources.

The constrained action element of the plan for 2005-2030 for the three-county region allocated 25.3% of all project funding to transit. Transit was second only to vehicle flow which received 34.4% of the total funding. Forty different projects were identified for METRO in the constrained scenario. The majority of the funding for these 40 projects was allocated to four major areas; general transit service operations and maintenance (\$850 million) local service restoration and expansion (\$67.75 million), the MetroBase facility (\$42.8 million) and bus replacements for 2018-2030 (\$40 million).

## City of Santa Cruz Master Transportation Study (2003)

The Master Transportation Study (MTS) was a joint planning effort between the City of Santa Cruz and the University of California Santa Cruz to develop a community-based approach to shaping the future transportation system. The four main objectives from the planning process included:

- Expand and offer new travel choices for people who live, work, play and visit Santa Cruz
- Provide relief for citywide vehicle traffic congestion
- Enhance community livability
- Achieve a sustainable transportation future

The key challenges were identified as addressing future traffic growth and reducing peak-hour single occupant vehicle trips. The study went on to make a number of short-term and long-term recommendations to achieve the objectives of the study. The short-term (5-year) strategies that are specific to transit include:

- Give right-of-way priority to transit through incremental Bus Rapid Transit (BRT) improvements that lead to a long-term BRT system. Incremental improvements include bus queue jump lanes, transit priority signalization, pre-payment of transit fares and reversible parking and travel lanes.
- Refine and build on the successes of the existing METRO system.
- Augment key transit services of the existing transit system to offer a core, high frequency limited-transfer transit network serving activity centers & region.
- Develop Metro Base; it is required for the successful implementation of expanded and improved transit services.
- At this time, a Bus Rapid Transit (BRT) system is the most flexible and cost effective transit technology to apply to Santa Cruz. It is a technology that can address both the regional mobility challenge of Highway 1 congestion, and the low-density distribution countywide and growth of development in South Santa Cruz County. Bus Rapid Transit is a system that combines the quality of rail line with the flexibility of buses. It can operate on ordinary city streets, exclusive transit ways or HOV lanes with priority for transit being the key component. A BRT system combines intelligent transportation systems technology, cleaner and quieter vehicles, rapid and convenient fare collection, and integration with land use policy.

Part of the short term strategies also evaluated METRO's route structure in some depth. The following route modifications were discussed to increase ridership:

- **Eastside — UCSC Connector.** Provide a direct, high frequency, local and express service to bypass downtown between UCSC and East Side residential neighborhoods with service extended to Cabrillo College.
- **North — South Central Route.** Provide a direct, high frequency service along the City's central north-south area connecting the Harvey West, Downtown, Metro Center and Boardwalk areas.
- **East — West Connector.** Provide direct, east - west transit route with limited stop express and local service linking the West Side residential neighborhoods, Mission Street retail, Santa Cruz High School, the Downtown, Soquel Avenue retail, East Side, and residential neighborhoods, with Cabrillo College.
- **Ocean Street Hotel/Beach Shuttle.** Seasonal, weekend shuttle providing 30-minute service between the Ocean Street hotels and the Boardwalk area.

The short-term strategies focused primarily on local City of Santa Cruz needs and didn't address the regional transportation issues the County is currently faced with. The long-term strategies took these factors into consideration and developed the following options:

- Transit and carpooling offer the greatest promise for traffic reduction through mode shift from SOVs.
- Based on the travel analysis, to achieve no future growth in vehicle traffic in the year 2020 from year 2000 levels, transit ridership levels need to increase for the external, commute in and out, and regional trips. For a transit emphasis solution, external transit mode splits need to increase from 3.8 % to an average of 8.6% (5.3% commute out and 11.8% commute in), a 125% increase by 2020.
- To achieve this level transit mode split, the City can benefit from a regional transit strategy, however any regional transit strategy must address both the regional mobility challenge of the high levels of vehicle traffic on Highway 1, and the low density distribution and growth of development in South Santa Cruz County.
- At this time, a Bus Rapid Transit (BRT) system is the most flexible and cost effective transit technology for the Santa Cruz region.
- At this time there are three potential rights-of-way available to implement future high occupancy, high frequency BRT technology that can address regional mobility and growth challenges: the rail corridor, local arterial streets and Highway 1.
- The Rail Corridor right-of-way option must be preserved for higher occupancy transit services, and pursued to achieve project funding in conjunction with whatever effort is made to modify Highway 1.
- Environmental analysis needs to be conducted to ensure HOV proposals are sensitive to City needs and the MTS vision including the effect on local streets, single occupancy vehicle use and land use impacts.
- The most efficient spatial configuration is to have high occupancy, high frequency, and minimum transfer service along direct routes linking major local and regional activity centers.
- Future growth of UCSC, beyond assumptions projected in this document, will require consideration of a new connection to an enhanced regional transit system. Any new connection must be designed and engineered for environmental sensitivity.

- In the future, the city should continue to consider the application of new, innovative technologies to increase local and regional transit ridership. Possible options are discussed in the following sections of this report.

## ADA Complementary Paratransit Comprehensive Operational and Financial Audit (2000)

Under the Americans with Disabilities Act of 1990 (ADA) METRO is required to provide complementary paratransit service for persons with disabilities. Prior to 2004, METRO contracted out its paratransit services. At the time this study was complete, Food and Nutrition Services (FNS) was the provider of paratransit services. The 2000 comprehensive operational and financial audit was completed to assess the following areas of the paratransit program:

- The current ADA eligibility process
- The service quality experienced by customers
- Service quality, including vehicles, drivers, and performance standards
- The reservations, scheduling and dispatch service provided under this contract
- The administration of the program by FNS
- The subcontractor's performance, compliance and reporting
- The contract for thoroughness
- The internal cost allocation of FNS and the accuracy of billings
- Compliance with the ADA regulatory requirements

Since paratransit operations are now provided by METRO, the following summary of the study's results will exclude those findings relating to contract with FNS. The findings and recommendations for the other areas of focus were filtered to its applicability for the SRTP and presented below.

**Current ADA eligibility process.** The eligibility process was found to be brief and did not ask if the applicant was unable to use fixed route services. It was recommended that METRO look into ways to more thoroughly verify ADA eligibility and to more strictly apply the eligibility criteria as described in the ADA regulations.

**Service quality experienced by customers.** Scheduling Assistants appear to be professional and interact well with customers. Implementing automated scheduling may increase scheduling efficiency, but may impact customers by increasing ride times and grouping more trips.

**Service quality, including vehicles, drivers, and performance standards.** The vehicle fleet and driver quality was found to vary based upon the provider of the service. A closer monitoring program for the personnel and a training program were suggested to improve driver performance.

The on-time performance standards were shown to be met but these standards were also recognized as being excessive. It was recommended that the current 45-minute window (-15 to +30) be revised to a 30-minute window (-30 to 0). It was also recommended that on-street monitoring and support for vehicles be implemented.

**The reservations, scheduling and dispatch service provided under this contract.** Overall, reservations, scheduling, and dispatch operate well. Areas to improve upon include:

- Improve timeliness of will call trips
- Improve communication between scheduling assistants and dispatch
- Manual scheduling procedures have resulted in denials, overcrowding and under-crowding due to the lack of real-time information for the scheduling assistants.

### UCSC Comprehensive Transit Study (2003)

The 2003 Comprehensive Transit Study completed for UCSC evaluated how well transit services to and through the main campus and off-campus were meeting the existing needs and anticipated future needs. The study was completed in cooperation with METRO and presented to their Board in January of 2004. Recommendations were used in the creation of the University's 2005 Long Range Development Plan.

The general conclusion for the study showed that the University must plan for significant increases in transit demand, especially internal transit trips. The internal demand was addressed by a series of modifications to the campus shuttle buses. The external demand was addressed by suggested changes to the METRO service. The following recommendations were suggested:

- Route #22: Add a stop on Laurel Street, reschedule to coordinate with class change times
- Routes #15/16: Add two vehicles to meet increasing demands
- Route #20: Improve frequency to every 60 minutes; add evening service until 10 PM
- Explore the possibility of a new service from UCSC to serve Ocean Street, Cabrillo College, and Aptos, that would bypass the Santa Cruz METRO Center

### UCSC Long Range Development Plan (2005-2020)

The LRDP provides UCSC with a comprehensive framework for the physical development of the UC Santa Cruz campus over a 15-year planning period. The document includes a land use plan that is structured to meet the academic and institutional objectives of the campus. The LRDP was accompanied by an Environmental Impact Report as required by the California Environmental Quality Act (CEQA).

The 2005 plan represents an increase in student enrollment to 19,500, an additional 5,100 students over the 2003-04 total enrollment. The circulation impacts associated with this increase were addressed in the plan and many solutions involved the continued utilization of METRO's services. The key aspects of the plan for the transit network include:

- Currently 40% of all trips to campus are made through single occupancy vehicles
- UCSC is the primary contributor to the public transit system, contributing \$2 million a year in rider fees to METRO.
- The LRDP calls for an interconnected network of transit routes with a transit hub located at east and west peripheral lots. Campus shuttles will continue to serve the inter-campus transit needs and METRO will provide off-campus and regional transit travel. BRT solutions, such as queue jump lanes or transit-priority traffic signals, may be installed to allow buses to bypass vehicles at congested intersections.
- A third entry to campus is proposed along Empire Grade to provide emergency egress to the west

- UCSC supports an Eastern Access route to campus.
- The LRDP calls for an extension of Meyer Drive to Hagar Drive, and Hagar Drive to Coolidge Drive, creating critical cross-campus links.
- The LRDP call for an additional 2,100 parking spaces to meet anticipated parking demands

## Major Transportation Investment Study (1997)

The MTIS is a long-term investment study for the Watsonville to Santa Cruz to UCSC Campus corridor to determine the best investment strategy for the future travel needs of the corridor. The recommended investment strategy was based on a new ¼ cent sales tax and a federal earmark to construct a busway and bikeway project in the Santa Cruz Branch Line right-of-way between Natural Bridges and State Park Drive by the year 2006. The technical tasks of the project included; public participation, travel model development, screening of alternatives, travel forecasts, transportation impacts, environmental scan, capital and operating and maintenance costs, financial analysis, MTIS report, and an intercity recreational rail study.

To date, there is still no clear consensus from the general public or the Regional Transportation Commission on what the best alternative is to dealing with the future travel needs along this corridor. The field is split between widening the highway for carpool and bus travel and implementing rail service in the corridor. There is also a “do nothing” group that doesn’t support any changes in the corridor.

The impacts to transit that resulted from the analysis showed Alternative 8, Improve Bus Service, as achieving the greatest transit mode share of travel in the corridor. This alternative includes adding new express bus service to Santa Cruz, California State University at Monterey Bay, and San Jose. New local service would be added in Watsonville, Harvey West, Aptos, Capitola, San Lorenzo Valley, and the west side of Santa Cruz and the UCSC campus. METRO’s bus fleet could exceed 150 vehicles plus needed spares.

Even under the Improve Bus Service scenario, the transit mode share was only estimated to be 2.73% of all trips. This is well below the County’s transit mode split goal of 10%. The results show UCSC as having the greatest growth in transit usage and capturing the highest number of transit trips. Downtown Watsonville was estimated to have the least number of trips made by transit. Overall, 83% of boardings were forecasted to occur between the UCSC campus and Capitola.

## Summary of Background Reports

In general, the following assumptions were developed from the reviewed transportation studies in Santa Cruz County.

- Traffic conditions are worsening
- There is a competition of funds and interests for the various modes of travel in Santa Cruz County
- Peak-hour single occupant trips could be reduced through increases in transit use
- BRT is a reasonable approach to increasing transit capacity and use
- UCSC, already a major consumer of transit, will continue to expand and thus contribute to increased transit use

The previous transportation improvement studies reviewed above offer a number of valuable recommendations, which were taken into consideration during the development of this SRTP. As long as traffic levels continue to increase in Santa Cruz County and single-occupant automobile travel continues to be the preferred method of travel, roadway congestion will worsen. Solutions to these issues offered by previous

studies favor an investment in transit, specifically BRT, which offers a cost-effective solution to increasing capacity and improving the attractiveness of transit. While BRT appears to be a preferred transit solution, competing interests and funds within the County have failed to create an environment where transit trumps other modes of travel to the point of bypassing congestion. Specifically, high-frequency corridors that would lend itself well for a BRT type transit service for METRO such as Highway 1 between Watsonville and Santa Cruz and the Laurel-Mission-Bay Street corridor between downtown Santa Cruz and UCSC are still forced to run mixed-flow, subjected to all the same congestion constraints of other motorist.

## PUBLIC OUTREACH

Public outreach is an essential component to a good community-based planning effort. The creation of the SRTP provided an ideal opportunity to reach out to the community and stakeholders to determine the strengths and weaknesses of METRO and identify changes that could be made to improve upon the identified deficiencies. This information provides essential qualitative insight that can then be paired with the quantitative performance assessment to accurately depict the current conditions of the system.

To focus the outreach efforts, various user groups were identified at the onset of the project. These groups were identified based on current usage patterns and dependence of the system for their day to day travels. Other groups were identified because they either had service and don't use it or they are currently lacking service.

Reaching out to these key stakeholders and users of the system is often times challenging. Recognizing that differing demographics use various methods to communicate, the outreach plan used multiple formats and mediums to gain the necessary information. Table 2- 1 below shows the groups who participated in the outreach and the techniques used to gain their input.

**Table 2- 1: Outreach Groups and Methods Used**

Group	Outreach Method
Transit Stakeholders	Face-to-face interviews
Transit Passengers	On-board surveys / intercept surveys
Transit Drivers (Metro fixed-route bus drivers)	Face-to-face interviews
Local communities (Watsonville, Capitola)	Community meetings
Cabrillo College (student, staff and faculty)	Online survey

## Stakeholder Interviews

The majority of stakeholder interviews were conducted at the onset of the project during the 2nd week of January, 2007. Follow up interviews with remaining stakeholders were conducted in February and March 2007. Those interviewed included elected officials, regional and community agencies, local business communities, educational institutions, and MAC members. Our understanding with each of the stakeholders interviewed was that their individual responses would be confidential, but that we would include all of the important comments as part of an overall evaluation.

A summary of the included stakeholders and their input can be found in Appendix D. Significant findings from the stakeholder interviews included:

- Santa Cruz local service caters toward downtown and UCSC and may be overlooking service worker travel needs or potential tourist market

- More local services for Watsonville, Capitola and Scotts Valley
- Increase service to Cabrillo College and its link to UCSC
- Traffic congestion hinders METRO's performance
- METRO staff does not do much in the way of advertising and/or marketing and therefore is not looking to service new potential markets.
- Long distances services (Highway 17 Express/Connections to Watsonville) are generally good but could be improved by decreasing travel time and increasing span of service.

## Transit Passenger Surveys

METRO current riders are perhaps the most important source of information when it comes to assessing performance of the agency. Two different approaches were taken to gain insight from this user group. The first, and most intensive of all the outreach efforts, was an on-board survey. This technique placed a surveyor on various buses throughout the METRO system and asked riders if they would take a voluntary and confidential survey while they ride. The survey was distributed as a hard copy for them to fill out. Assistance was given to the rider by the surveyor if requested.

The survey captured responses from 1,902 weekday riders over a three day period in March of 2007. Fourteen questions were asked of the riders including basic demographic information, origin/destination of transit trip, purpose of trip, and preference ratings for various attributes of the system. One side of the questionnaire was in English and the other side was translated into Spanish. A copy of the questionnaire, a detailed summary of the results, and mapped trips from origin locations from the four incorporated cities can be found in Appendix D.

Significant findings from the onboard survey included:

- The majority of the trips were home-based trips used for school and work, with just under half of all trips made for school purposes
- Over  $\frac{3}{4}$  of riders walked to the starting point of their transit trip
- The most common payment methods for the bus are the UC pass (33%), cash (26%), and a monthly pass (19%)
- $\frac{2}{3}$  of transit riders do not own a vehicle and 57% do not have access to a vehicle
- Just under half of all riders are ages 18-23
- Only  $\frac{1}{4}$  of riders are employed full-time and nearly half make less than \$10,000
- On-time arrivals was rated the lowest of the performance attributes and bus maintenance was rated the highest

## Bus Driver Interviews

WSA held interview sessions with METRO bus drivers on May 2<sup>nd</sup>, 2007 at the Santa Cruz Transit Center and the Bus Maintenance Facility on River Street. Four representatives (two located at each site) sat down with drivers during their breaks and discussed issues the drivers felt were important to include in the Short

Range Transit Plan process. The interviewers were equipped with a questionnaire but the drivers were encouraged to discuss any issues they felt were relative.

Those drivers that could not participate in the afternoon interview session were asked to submit letters or emails to the consultant. These submittals were compiled with the interview feedback.

WSA held interview sessions with METRO bus drivers on May 2<sup>nd</sup>, 2007 at the Santa Cruz Transit Center and the Bus Maintenance Facility on River Street. Four representatives (two located at each site) sat down with drivers during their breaks and discussed issues the drivers felt were important to include in the Short Range Transit Plan process. The interviewers were equipped with a questionnaire but the drivers were encouraged to discuss any issues they felt were relative.

Two important ideas were raised during these discussions:

- An investment by METRO in technology to record and measure performance for services would be beneficial. That way there would be a consistent resource to record information, provide information to customers and measure and monitor performance. Of particular importance is the ability to record on time performance. On time performance of services is affected by increasing congestion on major trunk lines.
- The operators believe that METRO service would be enhanced by regular communication forums being established between planning and operations to discuss route and service opportunities.

Those drivers that could not participate in the afternoon interview session were asked to submit letters or emails to the consultant. These submittals were compiled with the interview feedback. A summary of the

## Community Focus Groups

The communities of Watsonville and Capitola were identified as communities where outreach was needed as part of the SRTP development process. Watsonville is a community where it was felt more local service was needed for the growing population and Capitola was an area where local service was provided but not necessarily used. These outreach efforts were conducted to obtain feedback from the communities on how transit service could better serve their travel needs.

### Watsonville

WSA conducted a focus group with non-users of the transit service in the community of Watsonville on Wednesday, May 16 2006. The focus group was held at the La Manzana Community Resources Center, a bilingual, bicultural community resource center serving mostly low-income residents of Watsonville and Pajaro Valley.

The purpose of this focus group was threefold: 1) to identify if the members of the community were aware of METRO service in the City of Watsonville and the surrounding areas, 2) to identify the major reasons why METRO service is not currently used, and 3) to identify what service changes would increase the use of transit. The participants were a representative group of the Watsonville community, comprised of users and non-users, working class and low-income agricultural workers.

A detailed summary of the focus group can be found in Appendix D. The general recommendations that were developed from the session include:

- Provide an express route between Watsonville and Downtown Santa Cruz
- Provide more information about bus scheduling and stop locations

- Provide bus shelters. The majority of bus stops are only designated by a pole with the route number and provide no weather protection
- Provide good lighting and emergency phones at bus stop locations in remote areas
- Widely advertise service changes to bus routes (via mailers, on board and bus stop postings)
- Introduce a discounted bus fare price for children
- Introduce a bus transfer system
- Provide more bilingual bus drivers

## Capitola

WSA conducted a focus group with non-users of the transit service in the community of Capitola on Thursday, May 17, 2007. The focus group was held during the evening hours at Capitola City Hall. Working with community leaders, 15 individuals were asked to participate and all attended. The participants were a representative group of the Capitola community, comprised of users and non-users, owners and renters.

The purpose of this focus group was threefold: 1) to identify if the members of the community were aware of METRO service in the City of Capitola and the surrounding areas, 2) to identify the major reasons why METRO service is not currently used, and 3) to identify what service changes would increase the use of transit.

A detailed summary of the focus group can be found in Appendix D. The majority of the discussion at the session focused on providing a local shuttle/connector to improve mobility for the residents and tourists of the community. The general recommendations that were developed from the session include:

- Implement a trolley/circulator shuttle for the local trips within Capitola
- Serve more destinations directly, bypass transfer station at the Capitola Mall
- Provide more rider information, pre-trip and at the station
- Invest in environmentally clean buses to reduce pollution in the community

## Cabrillo College Online Survey

Cabrillo College was selected by METRO as a transit market for further research to determine ways to increase transit performance to this institution. An online survey was selected as the outreach method to get feedback on transit improvements from students, staff, and faculty. The survey was posted online and a link was put on the Cabrillo College home page that took users to the survey location. The site was published on the 15<sup>th</sup> of May and results were captured for a two week period.

The focus of the survey was to determine reasons why people did not use transit to get to and from Cabrillo College. The first question filtered those who used METRO and those who did not. Those who used METRO were not asked any further questions and were navigated out of the survey. The remaining respondents were asked a series of questions to determine the major reasons why they did not use the transit service.

A total of 141 responses were gathered from the survey. Question by question results are included in Appendix D. Over a third of the respondents use transit to get to Cabrillo, second only to auto (52%). Of those who use transit, almost 85% use it daily or almost daily. The results of the survey showed the following reasons why those Cabrillo users don't use transit:

- Difficulty in planning a trip was identified as a concern.
- Transit is viewed as not convenient to many respondents' lifestyles due primarily to off-peak/irregular schedules
- Poor on-time performance was highlighted as important reason why people don't use the service
- Poor or limited time coverage was a significant concern, specifically frequency of service and the need to transfer between buses
- There is a desire to expand service information, specifically real-time bus location information and a trip planning tool
- More direct routes was listed as a service coverage issue
- Limited service time coverage was very significant deterrent, specifically the lack of evening and weekend service and the frequency of service

## SUMMARY OF BACKGROUND INFORMATION

METRO provides a critical transportation service to many residents of Santa Cruz County. Regional transportation studies have identified an increase in transit's role in providing transportation solutions to solve many of the current congestion issues facing the County's population. Specifically, BRT has been identified as a feasible way to improve transit operations and reach the desired transit choice mode split envisioned for the County.

While transit is identified to play a more significant role in the future transportation system, METRO can improve upon its delivery of service in a variety of ways. The agency is still rebounding from systemwide adjustments made following the October 2005 strike. These adjustments, made primarily to align the existing scheduling of service and the newly required driver break requirements, are still being refined. Added uncertainties from traffic congestion and roadway construction complicate the scheduling process, resulting in reliability issues of the service.

Improvements have also been identified in the contrasting needs of the various markets for which METRO provides transit. On-board survey results and historical ridership shows students as a major user of transit. Population trends and transit rider demographics highlight the future expansion of transit ridership from Watsonville. While both of these user groups are potential users of transit, METRO needs to adapt its services and outreach techniques to accommodating their contrasting needs. This translates to a balancing of resources for those invested in technological advancements such as real-time signage and online trip planners and those dedicated to improving community-based outreach and bi-lingual communication.

# CHAPTER 3: GOALS, OBJECTIVES & STANDARDS

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## MISSION STATEMENT

*Provide a public transportation service that enhances personal mobility and creates a sustainable transportation option in Santa Cruz County through a cost-effective, reliable, accessible, safe, clean and courteous transit service.*

## GOALS AND OBJECTIVES

Goals, objectives and performance measures are used by METRO to establish the vision for how transit should be delivered and how decisions concerning its delivery, based upon the available resources, should be made by the agency. This process was initiated by the development of the goals and objectives and then quantified and assessed using performance measures developed by WSA in collaboration with METRO. Since a structured performance measuring program is new to METRO, a complementary monitoring program is suggested to ensure the standards are constantly working toward improving the system.

The Short Range Transit Plan (SRTP) must address the competing goals of productivity and service delivery. Identifying the importance of each of these goals in the performance measurement program was completed through rider surveys, transit non-user focus groups, bus operator surveys, and input from METRO staff. The cumulative feedback highlighted the desire to focus primarily on service delivery (specifically coverage) on secondarily on productivity.

The following goals and objectives were developed to meet the public transportation needs of the general public:

**Goal 1: METRO shall provide a family of services for the residents of Santa Cruz County that: connects key activity centers, serving as the foundation for the system; provides transportation alternatives to those who lack other options, including elderly persons, persons with disabilities, students, and economically disadvantaged persons; and allows for system expansion to serve new markets and opportunities.**

Objective 1.1: Develop a core group of services that connect key activity points and commit to providing service along those corridors that as the primary objective.

Objective 1.2: Review all services to evaluate how the needs of the transportation disadvantaged, using the federal definition which includes seniors, people with disabilities and those with low income, are being addressed as a second objective.

Objective 1.3: Consider the impact on core services and those to the transportation disadvantaged as part of requests for new or expanded services.

**Goal 2: METRO shall provide safe, reliable and accessible transportation to the residents of Santa Cruz County.**

Objective 2.1: Ensure that services are operated in a manner to maximize safety, to the riders, the public and the operators.

Objective 2.2: Operate service in a manner that will maximize reliability of transit services.

Objective 2.3: Consider potential for services within one-half mile of residential areas.

**Goal 3: METRO shall work cooperatively with local communities, residents, and other affected agencies and groups to develop the best possible family of services within the limitations of their resources.**

Objective 3.1: Develop an ongoing planning process with key agencies and organizations within Santa Cruz County and the region.

Objective 3.2: Operate the agency in a manner that will encourage public input and participation.

Objective 3.3: Ensure high levels of customer satisfaction.

**Goal 4: METRO shall consistently work to improve its operating efficiency and service delivery effectiveness.**

Objective 4.1: Operate service in a manner that will maximize system productivity.

Objective 4.2: Operate service in a manner that will maximize system efficiency.

Objective 4.3: Operate service in a manner that will maximize use of subsidies.

## PERFORMANCE STANDARDS

### Overview

A Performance Measurement Program is an essential tool for transit agencies to both monitor the service they deliver and provide justifications for modifications to that service. Development of a measurement program should focus on meeting the goals of the transit agency and fulfilling the needs of the community for which they serve. Deciding on these measurements and the quantity of measurements, is a combination of what data is obtainable by the agency and how that analysis of that data will affect the service design criteria. The following lists display the typical categories, methods of presentation and data collection and organization and standards of evaluation:

#### Categories:

- **Availability** - how easily potential passengers can use transit services
- **Service Delivery**- assessment of passengers experiences using transit
- **Community Measures** – transit’s role in achieving the greater goals of the community
- **Travel Time** – how long the transit trip takes (isolated and compared to other modes)
- **Safety and Security** – how safe the user feels and likelihood of an accident and how personally secure a passenger feels riding the bus or waiting at METRO facilities.
- **Maintenance and Construction** – effectiveness of the agency’s maintenance program
- **Economics** – utilization, efficiency, and effectiveness of service and management’s impact on these measures
- **Capacity** – ability of transit to move both vehicles and people

#### Data Presentation:

- Individual measures
- Ratios
- Indexes
- Level of service

**Data Collection Methods:**

- In-house sources (driver's manifest, schedules, financial data, etc.)
- Census data
- AVL or APC counters
- Manual field work (ridechecks)
- Environment Surveys (passenger on-board surveys, driver surveys, etc.)

**Standards of Evaluation:**

- Comparison to an annual average
- Comparison to a baseline value
- Trend analysis
- Self-identified standards
- Comparison to typical industry standards
- Comparison to peer systems

**Measures for METRO**

The development of the performance measurement program was done as an iterative process between WSA and METRO staff. After discussions with METRO staff, it was decided that the goals, objectives and performance measures should be developed from the bottom up to directly reflect the needs of the agency. This process used a combination of resources including the TCRP Report 88: *A Guidebook for Developing a Transit Performance-Measurement System* and observed measures from a number of peer transit agencies.

These developed measures were also based on the agency's ability to collect and analyze the needed data and the agencies ability to meet the criteria. Meetings were held with METRO staff to determine how data is currently collected and their vision for future upgrades that would allow them more analysis capabilities. Staff resources available for the collection and analysis process were also discussed prior to developing the performance monitoring programs.

In total, 19 measures were established for the service monitoring program. These measures and the goals and objectives they quantify are shown in Table 3-1. These measures will allow informed service improvement decisions to be made by METRO and their Board. The program comprehensively covers the goals and objectives of the agency. The criteria selected for these measures was set to be both manageable to obtain and stringent enough to identify where improvement/changes need to occur.

The suggested performance monitoring program contains a mixture of qualitative and quantitative measures. Quantitative measures are relatively easy to monitor and evaluate once the necessary data is collected. Qualitative measures are more difficult to collect and evaluate and often time take more resources. These measures focus on satisfaction ratings with customers and employees and communication with the local communities.

Recognizing that METRO operates different types of service to meet different needs and users, some of the performance measures were developed in recognition of the various types of fixed route services offered by

METRO. This was done to allow performance comparisons to be completed for routes of similar characteristics and purposes. These categories of fixed-route services include:

- Rural (6 Routes)
- Local/Feeder (17 Routes)
- Intercity (8 Routes)
- University of California at Santa Cruz (7 Routes)
- Regional (1 Route)

The majority of the performance measures can be collected and calculated with the current resources and technology. However, WSA recommends establishing annual surveying efforts for passengers, and the community to collect important information from these sources. These surveys would allow METRO the opportunity to gauge their performance through their riders and non riders and develop strategies to improve upon any viewed deficiencies. Financial constraints would limit these to annual systemwide surveys but comment cards and other forms of customer feedback should be encouraged and reviewed by staff as it is generated.

GIS (geographic information systems) data is also assumed to be available to METRO and the in-house tool (ArcView ArcGIS 9.0 or later) is assumed to be in use prior to starting the monitoring process. Many of the community measures depend upon the integration of the transit's spatial network and the demographic information obtained from the US Census Bureau and other local and regional surveys.

## Testing and Monitoring Process

The success of the performance monitoring program will be largely based on METRO ability to perform the following three tasks:

- Collect the needed data
- Analyze the data
- Report the data

These tasks were taken into consideration during the development process of the performance measures but METRO should run a pilot program to test the staff's ability to complete these tasks. If these tasks are found to be unfeasible to complete for any of the performance measurements, the suggested measurement should be revised or a replacement measurement should be pursued. Future technological investments by METRO could also reduce staff time and resources currently needed to collect certain pieces of information and these advancements need to be recognized and utilized.

The performance standard suggested for each performance measurement needs be calibrated to best meet the needs of METRO. The suggested performance standards were based on FY 2006-2007 averages for each service type and historic performance data. These numbers may be skewed due to abnormal events that occurred during these time periods or abnormal economic conditions. Forecasting transit activity is a difficult venture so METRO must monitor its current performance and its performance standards program to ensure the standards are set and adjusted as needed to meet the goals of the agency.

## General Planning Process

The Goals, Objectives and Standards program suggested in this chapter of the SRTP should be accompanied by a formal planning process to ensure it is being utilized to its fullest potentials. Over time, METRO should use this process to transition from reactive planning to a more of a prescribed and proactive internal planning process that identifies service opportunities to add, delete or change services in conjunction with the established performance standards and priorities. The recommendation also includes the development of a position of Planning Manager/Director to guide and lead overall planning and service design efforts, to ensure consistency and leadership from an overall management perspective and to ensure high level oversight of the processes.

Currently, service changes and recommendations are received by METRO staff through three primary sources:

- The general public (through comment cards or email);
- Bus drivers; and
- METRO staff.

These changes are collected by various METRO staff and screened to determine those that should move forward for further consideration. These suggested changes are then reviewed at the monthly meetings of the Service Planning and Review Committee (SPARC). This committee is composed of METRO Planning staff, METRO Operations Staff and representatives from the bus drivers' union. Final recommendations generated at these meetings are presented to the METRO Board for approval before reaching the implementation stages.

The SRTP recommendation is to provide structure and formalize planning and service performance monitoring to effectively and efficiently meet the needs of the agency and its users. Service improvements or changes should be made based on community needs as well as service performance. The Planning Manager/Director would have as his or her responsibility monitoring service performance, developing service performance reports that are prepared at regular intervals for the General Manager, Deputy and the METRO Board, so that they have the tools they need to make service decisions based on established priorities.

To support performance monitoring program, planning staff will be responsible for collecting and entering all inputs needed to keep the all routes in the system monitored. A regular schedule for data collection and inputs should be developed and followed consistently. Specific recommendations to modify the input process, the goals/objectives/standards criteria and associated service modifications would also be the responsibility of the Planning Manager/Director, but would logically coincide with the budgeting process timelines.

It is intended that as recommendations for service changes are merited, the process of bringing these recommendations to the existing SPARC Committee or another recommended process should continue.

Table 3- 1: Performance Measures

Goal	Objective	Measure Category	Measure	Description	Categories	Current Performance	Suggested Target Performance	Reporting Frequency	Data Collection Method	Data Analysis Method	
						Average or average (low-high)					
1. METRO shall provide a family of services that connects key activity centers provides transportation alternatives to those that lack other options, and allows for system expansion to serve new markets and opportunities.	1.1 Develop a core group of services that connect key activity points	Availability	Span of service	Total hours service is provided - have service available during times when it is appropriate	Core services	Varies by type	18 hours	Annual	Hastus	Excel	
		Availability	Frequency	Minimum appropriate headway	Core services	Varies by type	15, 30, 60	Annual	Hastus	Excel	
		Capacity	Seat Capacity	Seats available	Core services	Varies by type	Standees measure	Annual	Ride Check Results	Excel	
		Travel Time	Transit-Auto Travel Time	Transit trip not to exceed 150% of same trip by automobile	Core services	Not Yet Collected	90%	Quarterly	Hastus	Excel	
		Availability	Service coverage	Service available at key activity centers (key activity centers to be further defined)	Core services	Not Yet Collected	100%	Annual	County or Local Planning Depts	GIS	
	1.2 To the maximum extent possible ensure that services are available to transportation disadvantaged	Community	Service coverage	% of the total population within walking distance (1/4 mile of a transit stop[1])	Systemwide	88%	90%	Annual	Census and/or AMBAG	GIS/Excel	
			Availability	Frequency	Minimum headway frequency during non-peak (peak)	Rural	Limited	(60) 60 \ 60*	Annual	Hastus	Excel
						Intercity	Varies	(30) 60 \ 60*			
						Local / Feeder	Varies	(30) 60 \ 60*			
						UCSC	Varies	(15) 15 \ 60*			
		HWY 17				Varies	(30) 60 \ 60*				
		Service Delivery	Span of Service	Total hours service is operated	Rural	Varies	6 hours (allocated to peak periods)	Annual	Hastus	Excel	
					Intercity	Varies	14 hours				
					Local / Feeder	Varies	14 hours				
					UCSC	Varies	18 hours				
HWY 17	Varies				16 hours						
1.3 Consider the impact on core services and transportation disadvantaged as requests for new services are studied	Community	Service Equity	Equitable distribution of costs and benefits from investments in transit – cost per additional riders	Systemwide	Not Yet Collected	?	Annual	Existing Ride Check	Excel		

Goal	Objective	Measure Category	Measure	Description	Categories	Current Performance Average or average (low-high)	Suggested Target Performance	Reporting Frequency	Data Collection Method	Data Analysis Method
2. METRO shall provide a safe, reliable, accessible and attractive means of transportation to the residents of Santa Cruz County.	2.1 Ensure that services are operated in a manner to maximize safety, to the riders, the public and the operators	Safety and Security	Accident rate	# of accident per service mile	Systemwide	0.48 accidents per 100,000 miles	< 1 accident per 100,000 miles	Quarterly	Operations Data?	Excel
	2.2 Operate service in a manner that will maximize reliability of transit services	Service Delivery	On-time performance	% of transit vehicles departing at a scheduled timepoint	Systemwide	Varies	90% of timepoints within 5 minutes of schedule, 0% early departures - systemwide	Annual	Ride Check Results	Excel
		Service Delivery	Run time ratio	(Ratio of observed running time to scheduled running time)*100	Systemwide	Not Yet Collected	Between 90-110 – systemwide	Annual	Ride Check Results and Headways	Excel
		Service Delivery	Compliant rate	Number of passenger complaints	Systemwide	METRO To Provide	≤ 1 per 1,000 service hours – systemwide	Quarterly	Customer Service?	Excel
		Service Delivery	Missed trips	Trips removed from the daily schedule due to mechanical breakdown or driver absences	Systemwide	METRO To Provide	≤ 0.5% - systemwide	Quarterly	Hastus?	Excel
		Maintenance and Construction	Spare ratio	% of fleet available to substitute for other vehicles	Systemwide	METRO To Provide	≥ 20%	Annual	Operations Data?	Excel
	2.3 Consider service potential within one-half mile of residential areas	Availability	Service coverage	% of the total population within walking distance (1/4 mile of a transit stop[2])	Systemwide	88%	90%	Annual	Census and/or AMBAG	GIS/Excel

Goal	Objective	Measure Category	Measure	Description	Categories	Current Performance Average or average (low-high)	Suggested Target Performance	Reporting Frequency	Data Collection Method	Data Analysis Method
3. METRO shall work cooperatively with the communities and residents of Santa Cruz County to develop the best possible transit service within the limitations of their resources.	3.1 Develop an ongoing planning process with key agencies and organizations within Santa Cruz County and the region.	Community Measures	Communications	How well transit agencies are able work with key agencies and local communities	Systemwide	Not Yet Collected	80% or average above 4.0	Annual	Annual Community Survey	Excel
	3.2 Operate the agency in a manner that will encourage public input and participation	Community Measures	Communication	% of community responding as satisfied or very satisfied on community survey	Systemwide	Not Yet Collected	80% or average above 4.0	Annual	Annual Community Survey	Excel
	3.3 Ensure high levels of customer satisfaction	Service Delivery	Customer satisfaction	% of customer responding as satisfied or very satisfied on questionnaire	Systemwide	Not Yet Collected	80% or average above 4.0	Annual	Annual Customer Survey	Excel

Goal	Objective	Measure Category	Measure	Description	Categories	Current Performance	Suggested Target Performance	Reporting Frequency	Data Collection Method	Data Analysis Method
						Average or average (low-high)				
4. METRO shall consistently work to improve its operating efficiency and service delivery performance.	4.1 Operate service in a manner that will maximize system productivity	Economic	Ridership	Average weekday ridership	Rural	403	Previous year's month total * [1 + (annual County population growth)]	Monthly	Fare Revenues	Excel
					Intercity	2,385				
					Local / Feeder	6,831				
					UCSC	8,027				
					HWY 17	713				
			Productivity	Passengers per revenue hour	Rural	16.44 (11.91-24.38)	≥ 15.0	Monthly	Operations Data	Excel
					Intercity	25.79 (19.16-32.28)	≥ 20.0			
					Local / Feeder	19.16 (7.17-51.54)	≥ 10.0			
					UCSC	58.54 (43.55-70.30)	≥ 50.0			
					HWY 17	12.79	≥ 10.0			
	Productivity	Passengers per service <sup>2</sup> mile	Rural	0.50 (0.34-0.70)	≥ 0.5	Monthly	Operations Data	Excel		
			Intercity	1.40 (0.69-2.35)	≥ 1.5					
			Local / Feeder	1.31 (0.30-5.23)	≥ 0.5					
			UCSC	5.22 (0.60-12.48)	≥ 5.0					
			HWY 17	0.52	≥ 0.5					
	4.2 Operate service in a manner that will maximize system efficiency	Economic	Cost efficiency	Cost per service mile (\$)	Rural	\$7.17 (\$3.88-\$13.99)	≤ \$10	Monthly	Operations Data	Excel
					Intercity	\$8.82 (\$4.92-\$12.52)	≤ \$10			
					Local / Feeder	\$10.14 (\$3.38-\$25.30)	≤ \$10			
					UCSC	\$15.54 (\$2.27-\$46.74)	≤ \$20			
					HWY 17	\$4.84	≤ \$5			
		Cost effectiveness	Operating ratio (farebox recovery)	Rural	7.96% (4.06%-12.21%)	≥ 5%	Monthly	Operations Data	Excel	
				Intercity	16.10% (12.25%-20.54%)	≥ 15%				
				Local / Feeder	9.52% (1.68%-18.27%)	≥ 10%				
				UCSC	33.48% (25.17%-39.93%)	≥ 30%				
HWY 17				23.48%	≥ 25%					
Employee efficiency	Paid to platform ratio	Systemwide	88.28%	≥ 90%	Quarterly	Hastus?	Excel			
		Economic	Cost effectiveness	Subsidy per passenger (\$)	Rural	\$13.23 (\$7.87-\$20.62)	≤ \$15	Monthly	Operations Data	Excel
					Intercity	\$5.57 (\$4.06-\$7.55)	≤ \$5			
					Local / Feeder	\$9.92 (\$3.15-\$22.09)	≤ \$10			
					UCSC	\$1.97 (\$1.41-\$2.83)	≤ \$2			
HWY 17	\$7.17	≤ \$10								

## Summary

The suggested performance monitor process will give METRO the opportunity to be proactive in their planning practices and identify service issues or service needs as early as possible. Current staff resources and technology investments allow planning operations to focus primarily on problems once they surface, rather than identifying them earlier on in their development. The lack of Automatic Vehicle Locator (AVL) devices and Automatic Passenger Counters (APC) on service vehicles also limit the amount of real-time data that the Planning staff have access to, further limiting their abilities.

Recent investments in GIS and the ATP module (allowing run-time calibration to occur) for Hastus will aid in the data collection and analysis tools needed to develop the monitoring program. Additional staffing resources would also greatly increase the frequency and precision of the monitoring and reporting process. As these resources continue to increase, METRO will be able to implement an active and responsive reporting and monitoring system that will give METRO staff and its Board members valuable information needed to assess necessary actions needed to improve their transit system for the residents of Santa Cruz County.

## CHAPTER 4: SYSTEM EVALUATION / CURRENT PERFORMANCE

Evaluation of METRO's fixed route services was completed systemwide and route by route. The systemwide assessment is useful to determine trends in the overall transit market for Santa Cruz County. The route by route evaluation provides a more detailed assessment of how the individual routes are doing compared to the overall system, and compared to peer routes that fall within the same METRO service category. Table 4-1 shows METRO's systemwide performance from FY 2003-04 to FY 2006-07.

Table 4- 1: Systemwide Performance Summary

	FY 2003-04	FY 2004-05	FY 2005-06*	FY 2006-07	Total Change (03/04-06/07)
Fare Revenues	\$ 6,697,702	\$ 7,141,807	\$ 6,301,904	\$ 7,730,498	\$ 1,032,796
<i>year previous % change</i>		6.63%	-11.76%	22.67%	15.42%
Operating Cost	\$ 30,608,074	\$ 32,316,524	\$ 33,310,816	\$ 36,875,628	\$ 6,267,554
<i>year previous % change</i>		5.58%	3.08%	10.70%	20.48%
Revenue Miles of Operation	3,775,849	3,286,376	2,875,196	3,249,061	(526,788)
<i>year previous % change</i>		-12.96%	-12.51%	13.00%	-13.95%
Revenue Hours of Operation	248,361	216,531	194,306	221,188	(27,173)
<i>year previous % change</i>		-12.82%	-10.26%	13.83%	-10.94%
Total Passengers Carried	5,962,173	5,596,884	4,769,437	5,605,317	(356,856)
<i>year previous % change</i>		-6.13%	-14.78%	17.53%	-5.99%
Farebox Recovery Ratio	0.22	0.22	0.19	0.21	(0.01)
<i>year previous % change</i>		0.99%	-14.39%	10.81%	-4.20%
Average Fare/Passenger	\$ 1.12	\$ 1.28	\$ 1.32	\$ 1.38	\$ 0.26
<i>year previous % change</i>		13.59%	3.55%	4.38%	22.77%
Passengers Carried / Revenue Hour	24.01	25.85	24.55	25.34	1.34
<i>year previous % change</i>		7.67%	-5.04%	3.24%	5.56%
Passengers Carried / Revenue Mile	1.58	1.70	1.66	1.73	0.15
<i>year previous % change</i>		7.85%	-2.60%	4.00%	9.26%
Operating Cost / Passenger	\$ 5.13	\$ 5.77	\$ 6.98	\$ 6.58	\$ 1.44
<i>year previous % change</i>		12.47%	20.96%	-5.81%	28.15%
Subsidy Cost / Passenger	\$ 4.01	\$ 4.50	\$ 5.66	\$ 5.20	\$ 1.19
<i>year previous % change</i>		12.16%	25.90%	-8.18%	29.65%
Operating Cost / Service Hour	123.24	149.25	171.43	166.72	\$ 43.48
<i>year previous % change</i>		21.10%	14.87%	-2.75%	35.28%

\* does not include the month of October 2005 due to a strike that lasted the duration of the month

From 2003 to 2007, there has been a general increase in fare revenues and total operating cost, while ridership and revenue miles and hours of operation have declined. Compared to the year prior, operation hours, miles, and ridership in FY 2006-07 have increased, despite a downward trend during previous years. However, it should be noted that this may be a result of the strike in 2005, and compared to the year before (FY 2004-05), these numbers were relatively similar.

Among the most significant changes from 2003 to 2007 were operating costs per passenger and per service hour, and subsidy cost per passenger. These costs did, however, decline slightly in FY 2006-07 from the previous year, despite an earlier upward trend. Over the four year period, there were also relatively smaller

gains in passengers per revenue hour and mile, both of which declined slightly in FY 2005-06 but returned back up to previous levels the following year.

Average fare per passenger has increased rather steadily over the past four years. This increase is also reflected in the overall increase in total fare revenues and decline in total ridership. On the other hand, the farebox recovery ratio has declined slightly over the four year period, though it has fluctuated rather significantly. The drop in farebox recovery in FY 2005-06 could be partly due to the strike in October, when fare revenues also declined considerably while operating costs continued to increase.

The route by route assessment is presented in Table 4-2 and Table 4-3 and Figures 4-1 to 4-5. Table 4-2 shows route by route performance, summarizing operating costs, ridership, and revenues. In earlier sections of the report there was a discussion regarding the different types of routes which METRO operates, by category. One reason this was done is to recognize that different types of services perform at different bases. Therefore the expectation for route performance should be different for routes as they are distinguished by category.

In terms of route categories, the UCSC routes have the highest farebox recovery and passengers, and the lowest per passenger operating costs. The regional route also has a very high farebox recovery, but, as it is mainly used for longer distance travel, it carries a relatively lower number of passengers per mile and per hour, as would be expected. The rural routes are generally the lower performing routes, as they serve smaller markets and span longer distances while maintaining regular fares. These routes thus have lower farebox recovery rates and provide greater subsidies per passenger. A number of local/feeder services also have relatively lower performance in terms of passengers per hour and per mile. These tend to be the limited or special service routes.

A route by route ridership summary is shown in Table 4-3. Total annual and average weekday ridership is highest among the UCSC routes, which, not surprisingly, carry the highest percentage of UCSC riders. These annual ridership numbers are also high despite the fact that many of these routes are operated only during the school term. The intercity routes also have high ridership levels, and they also carry the highest percentage of weekend trips. A handful of rural, intercity, and local/feeder routes carry a higher than average percentage of UCSC trips. This indicates that these may be the main transit services used by UCSC students and faculty traveling to and from places further away from campus.

The intercity routes, followed by local/feeder routes, tend to serve a higher percentage of Cabrillo riders. This includes Route 70, an intercity route, which is a service specific to Cabrillo College. These two types of routes also carry a large number of wheelchair riders, possibly indicating a more transit-dependent population that exists around those service areas. Relatively high numbers of wheelchair passengers are notable on a handful of local/feeder routes, particularly Routes 53 and 88. This may have significant implications for the operations of these routes and the types of vehicles used, which can influence boarding/alighting delays and capacity.

In terms of average weekday ridership, UCSC and intercity routes are again shown to be among the highest. All UCSC routes are near the highest in terms of ridership and farebox recovery and among the lowest in subsidies per passenger. A number of intercity and local/feeder routes rank relatively high in these criteria as well, namely intercity routes 69, 69A, and 69W and local/feeder routes 66 and 68.

The suggested performance targets for the quantitative performance monitoring program were developed using averages calibrated based on the FY 2006-07 data. Reviewing each route to the averages for each category is an approach which METRO staff can utilize regularly to monitor route performance on a regular basis. These standards were calibrated based on current system performance and service goals.

Table 4- 2: Route by Route Performance Summary (FY 2006-2007)

Route	Estimated Operational Cost	Estimated Fare Revenues	Farebox Recovery	Passengers Per Hour	Passengers Per Mile	Operating Cost Per Passenger	Subsidy Per Passenger
<b>Rural</b>							
33*	\$ 40,492	\$ 4,949	12.22%	25.09	1.17	\$ 8.03	\$ 7.05
34*	\$ 30,814	\$ 2,312	7.50%	12.38	0.82	\$ 16.27	\$ 15.05
40	\$ 240,315	\$ 25,178	10.48%	17.31	0.64	\$ 11.63	\$ 10.41
41	\$ 307,808	\$ 22,171	7.20%	12.25	0.51	\$ 16.43	\$ 15.25
42	\$ 303,015	\$ 17,028	5.62%	9.48	0.34	\$ 21.24	\$ 20.04
72	\$ 645,300	\$ 60,138	9.32%	15.14	0.73	\$ 13.30	\$ 12.06
Average	\$ 258,077	\$ 20,651	8.00%	13.31	0.58	\$ 15.13	\$ 13.92
<b>Local / Feeder</b>							
3	\$ 417,770	\$ 38,214	9.15%	17.43	1.26	\$ 11.55	\$ 10.50
4	\$ 372,101	\$ 48,113	12.93%	29.73	2.59	\$ 6.77	\$ 5.90
7	\$ 236,818	\$ 14,569	6.15%	12.88	1.15	\$ 15.63	\$ 14.67
9	\$ 58,355	\$ 5,227	8.96%	15.42	0.82	\$ 13.05	\$ 11.89
31	\$ 280,763	\$ 24,558	8.75%	15.08	0.78	\$ 13.35	\$ 12.18
32	\$ 105,127	\$ 5,718	5.44%	9.40	0.55	\$ 21.42	\$ 20.25
53	\$ 206,215	\$ 10,830	5.25%	9.82	0.69	\$ 20.50	\$ 19.42
54	\$ 286,925	\$ 10,398	3.62%	6.66	0.39	\$ 30.24	\$ 29.14
55	\$ 465,162	\$ 44,520	9.57%	17.97	1.22	\$ 11.20	\$ 10.13
56	\$ 235,956	\$ 14,339	6.08%	11.61	0.51	\$ 17.35	\$ 16.30
66	\$ 1,360,641	\$ 221,015	16.24%	28.90	2.49	\$ 6.97	\$ 5.84
68	\$ 1,001,057	\$ 138,636	13.85%	25.03	2.11	\$ 8.05	\$ 6.93
68N	\$ 261,543	\$ 31,934	12.21%	21.43	1.46	\$ 9.40	\$ 8.25
74	\$ 474,018	\$ 42,441	8.95%	14.37	0.83	\$ 14.02	\$ 12.76
75	\$ 957,828	\$ 119,688	12.50%	20.07	1.21	\$ 10.03	\$ 8.78
79	\$ 232,557	\$ 27,900	12.00%	20.04	1.18	\$ 10.05	\$ 8.84
88****	\$ 80,017	\$ 1,310	1.64%	50.33	5.04	\$ 4.00	\$ 3.94
Average	\$ 413,697	\$ 47,024	11.37%	20.94	1.45	\$ 9.62	\$ 8.52
<b>Intercity</b>							
35/35A*	\$ 4,604,742	\$ 538,723	11.70%	20.60	1.03	\$ 9.78	\$ 8.63
69	\$ 780,797	\$ 143,682	18.40%	33.45	3.09	\$ 6.02	\$ 4.91
69A	\$ 1,894,821	\$ 329,778	17.40%	30.01	1.62	\$ 6.71	\$ 5.54
69W	\$ 1,908,385	\$ 357,876	18.75%	32.51	1.82	\$ 6.19	\$ 5.03
69N	\$ 334,402	\$ 36,595	10.94%	19.71	1.58	\$ 10.21	\$ 9.10
70***	\$ 408,887	\$ 61,385	15.01%	27.83	2.29	\$ 7.23	\$ 6.15
71	\$ 6,753,746	\$ 984,114	14.57%	24.92	1.42	\$ 8.08	\$ 6.90
91	\$ 554,206	\$ 72,376	13.06%	22.25	0.91	\$ 9.05	\$ 7.87
Average	\$ 2,154,998	\$ 315,566	14.64%	25.43	1.41	\$ 7.92	\$ 6.76
<b>UCSC</b>							
10	\$ 1,020,981	\$ 333,277	32.64%	60.26	4.86	\$ 3.34	\$ 2.25
12A**	\$ 30,990	\$ 10,207	32.94%	61.12	4.21	\$ 3.29	\$ 2.21
13**	\$ 306,634	\$ 125,108	40.80%	75.59	6.45	\$ 2.66	\$ 1.58
15**	\$ 1,084,938	\$ 409,374	37.73%	69.87	5.97	\$ 2.88	\$ 1.79
16**	\$ 2,733,850	\$ 991,669	36.27%	66.67	5.37	\$ 3.02	\$ 1.92
19**	\$ 961,247	\$ 295,106	30.70%	56.71	4.20	\$ 3.55	\$ 2.46
20**	\$ 1,242,002	\$ 250,675	20.18%	37.29	2.46	\$ 5.40	\$ 4.31
Average	\$ 1,054,377	\$ 345,060	32.73%	60.36	4.68	\$ 3.34	\$ 2.24
<b>Regional</b>							
17	\$ 3,415,613	\$ 1,732,587	50.73%	14.42	0.47	\$ 13.96	\$ 6.88
<b>Total</b>	<b>\$ 36,875,628</b>	<b>\$ 7,616,502</b>	<b>20.65%</b>	<b>29.95</b>	<b>1.69</b>	<b>\$ 6.72</b>	<b>\$ 5.33</b>

\* Some or all Trips Operated During San Lorenzo Valley School Term Only

\*\* Some or all Trips Operated During UCSC School Term Only

\*\*\* All Trips Operate Only During Cabrillo College School Term

\*\*\*\* Service Operates Mid-November Through Mid-April Only

Table 4- 3: Route by Route Ridership Summary (FY 2006-2007)

Route	Annual Ridership 2006-2007	Average Weekday Ridership	% of Total Trips During Weekday	% of Total Trips by UCSC Riders	% of Total Trips by Cabrillo Riders	Bikes per 1,000 Riders	Wheelchairs per 1,000 Riders
<b>Rural</b>							
33*	5,045	29	100.0%	0.4%	0.4%	2	0.2
34*	1,894	11	100.0%	0.3%	1.0%	4	0.0
40	20,659	68	82.6%	3.9%	1.1%	42	0.4
41	18,731	70	93.6%	17.3%	4.4%	84	0.5
42	14,268	41	71.7%	13.7%	3.5%	120	1.2
72	48,509	192	100.0%	1.2%	4.0%	18	4.5
Average	17,061	59	84.0%	5.7%	3.0%	43.6	3.3
<b>Local / Feeder</b>							
3	36,161	143	100.0%	20.2%	4.8%	45	5.0
4	54,943	218	100.0%	6.6%	2.2%	19	13.8
7	15,149	60	100.0%	6.9%	5.1%	11	5.8
9	4,470	18	100.0%	10.1%	1.0%	7	1.1
31	21,031	83	100.0%	6.9%	2.5%	44	4.3
32	4,909	19	100.0%	5.9%	2.9%	44	4.9
53	10,059	40	100.0%	2.1%	3.7%	15	35.1
54	9,489	11	30.1%	2.3%	10.4%	37	13.4
55	41,519	155	94.1%	1.5%	30.6%	22	17.2
56	13,599	54	100.0%	1.1%	24.2%	31	24.5
66	195,265	587	75.8%	11.4%	3.3%	26	7.6
68	124,429	383	78.1%	14.4%	3.2%	24	6.6
74	27,837	81	73.4%	17.7%	3.8%	41	3.8
75	33,819	134	100.0%	0.9%	2.5%	8	6.0
79	95,461	266	70.3%	1.1%	2.7%	16	5.5
88****	23,141	92	100.0%	1.8%	5.0%	8	39.4
Average	43,017	146	83.0%	8.5%	5.2%	23.3	9.2
<b>Intercity</b>							
35/35A*	471,055	1,508	80.7%	3.4%	2.6%	39	1.3
69	129,690	502	97.5%	14.8%	3.1%	31	7.0
69A	282,370	825	73.6%	7.0%	2.5%	31	9.2
69W	308,098	938	76.7%	7.3%	9.8%	32	7.8
69N	32,738	130	100.0%	16.8%	9.0%	50	8.7
70***	56,516	270	100.0%	4.9%	33.5%	36	6.9
71	835,778	2,620	79.0%	4.8%	10.0%	38	5.6
91	61,244	230	94.7%	5.7%	13.8%	49	2.1
Average	272,186	878	80.7%	5.9%	7.7%	36.5	5.5
<b>UCSC</b>							
10	305,527	1,091	90.0%	90.2%	0.5%	27	0.9
12A**	9,406	52	93.2%	94.5%	0.3%	30	0.1
13**	115,115	677	100.0%	94.4%	0.3%	19	0.2
15**	376,444	2,214	100.0%	93.8%	0.5%	24	0.4
16**	905,191	2,877	80.1%	90.1%	0.5%	26	0.4
19**	270,730	938	87.3%	88.8%	0.6%	25	0.4
20**	230,030	780	85.4%	83.7%	1.0%	26	0.4
Average	316,063	1,233	87.4%	90.2%	0.6%	25.4	0.5
<b>Regional</b>							
17	244,618	817	84.2%	0.4%	0.6%	58	1.9
<b>Total</b>	<b>5,485,258</b>	<b>19,368</b>	<b>83.9%</b>	<b>40.0%</b>	<b>4.1%</b>	<b>31.4</b>	<b>3.7</b>

\* Some or all Trips Operated During San Lorenzo Valley School Term Only

\*\* Some or all Trips Operated During UCSC School Term Only

\*\*\* All Trips Operate Only During Cabrillo College School Term

\*\*\*\* Service Operates Mid-November Through Mid-April Only

METRO's current performance summary highlights the strengths and weaknesses in terms of transit markets within the County. Three types of routes stand out above the rest in terms of ridership, farebox recovery and operational efficiency. These include UCSC routes, intercity routes (Watsonville-Santa Cruz and Scotts Valley to Santa Cruz) and the Highway 17 Express regional route. While these 16 routes only comprise 40% of the total routes, their service accounts for 84% of all riders and 87% of all revenue. The local and rural services while not operating as productively as the other categories assist METRO in meeting other goals such as coverage and connectivity.

The outreach results identify some significant hurdles that METRO can address in its continuing efforts to improving transit service. Improving on-time performance, increasing frequency and adapting service and communications to its contrasting populations and riders will improve the transit experience for its current riders and help capture new or "choice riders" within the County.

The benefit of METRO having in place a performance monitoring program is that it can provide information to decision makers so they can make informed decisions regarding how dollars for services can be best used to meet local priorities. The system evaluation findings and information learned from the background reports and community involvement discussions suggest an opportunity for developing a new vision for transit services within Santa Cruz County.

This change would increase the visibility of public transportation within the transportation network and work to create an environment where transit is not secondary to the automobile. This vision would focus on creating high density service corridors within the County to meet those corridors with the highest demand for services. Ultimately these could be partnered with transit preferential operations and transit-supportive land use that would increase operational efficiency of the transit vehicles and increase the market share of transit. Local and rural service would be tailored to the geographic needs of each community in terms of frequency, span of service and vehicle type and allow connectivity to these transit corridors. The local services would provide geographic coverage to the broader community at levels which are commensurate with needs identified. The service plan suggested in the following chapter highlights the specific components of this transit service.

# CHAPTER 5: SERVICE IMPROVEMENT PROGRAM

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## OVERVIEW

Based on the results and findings from the previous chapters, the focus of this chapter is to move forward with service improvement recommendations. Data used in the development of this program are taken from the reported FY 06-07 results.

## COMMUNITY OUTREACH / COMMUNICATION

It would appear that future service improvements should be complemented with an increase in communication and outreach for existing and potential transit riders. This strategy should be flexible to reach the various markets of transit riders within Metro's service area. For example, the methods and techniques used to communicate with students at UCSC differ from those of passengers in Watsonville who make a daily commute to Santa Cruz. It is important to distinguish the various markets in the County and tailor communication and outreach to best serve their needs.

The results of the outreach conducted as part of the study recommends the following improvements:

- Upgrade METRO's website to increase usability and improve the image of the agency
- Print all marketing and reference material is both English and Spanish
- Distribute transit information by mail including schedules and service updates
- Consider deployment of bi-lingual drivers in areas of high Spanish-speaking riders

## FIXED ROUTE SERVICE PLAN

METRO's current fixed route service has developed incrementally over the years, adding service when funds allowed and reducing service when resources were limited. This SRTP, to a large degree, is the first comprehensive look at how the fixed route service reached the point it is at today and allows an opportunity to assess what the best use of METRO's resources will be in the years to come.

### Current Service Provided

Using the route classifications identified in Chapter 2, an analysis of service hours by route type was completed to show how service is currently being allocated between the various service areas. Table 5-1 contains hours of service by route classification and shows that Intercity Routes currently account for 47% of all service provided by METRO. Local service and UCSC services account for a combined 39% of service with rural and regional services composing the remaining 14%.

Table 5-1: Hours of Service (by Route Classification)

Classifications	Routes	Total Service Hours	
Rural	33, 34, 40, 41, 42, 72, 76	8,972	4.9%
Local/Feeder	3, 4, 7, 9, 31, 32, 53, 54, 55, 56, 66, 68, 68N, 74, 75, 79, 88	34,926	19.1%
Intercity	35, 35A, 69, 69A, 69W, 69N, 70, 71, 91	85,617	46.8%
UCSC	10, 12, 13, 15, 16, 19, 20	36,654	20.0%
Regional	17	16,963	9.3%
<b>Total:</b>		<b>183,132</b>	<b>100%</b>

An analysis of rural, local and intercity services shows the allocation of service within these areas. For rural services, the majority of hours are distributed between Bonny Doon/Davenport and Corralitos as shown in Table 5-2. Local service in the San Lorenzo Valley accounts for less than 5% as many hours as the other two rural markets and is also without weekend service.

Table 5-2: Service Hours of Rural Routes (by Service Area)

	Routes	Total	
San Lorenzo Valley	33, 34	354	3.9%
Bonny Doon/ Davenport	40, 41, 42	4,227	47.1%
Corralitos	72, 76	4,391	48.9%
Total:		8,972	100.0%

An analysis of local/feeder services shows 36% of all local service hours going toward Santa Cruz services, 25% toward the communities of Capitola/Live Oak and approximately 24% going to Watsonville. Scotts Valley/Graham Hill and Aptos/Rio Del Mar/La Selva Beach account for 5-10% each. Due to the interlining practices of METRO and the designation of UCSC routes in a separate category, these hours may be a bit misleading. Both Watsonville and Santa Cruz have additional local service provided by the intercity routes that have stops in each of the communities plus Santa Cruz has an additional 36,000 hours added in UCSC services. Although the UCSC service is operated based on the needs of the students and faculty and operates only during school terms, these hours alone are four times as many as either Capitola/Live Oak or Watsonville local service hours. Route 66's 6,757 hours, assigned to Santa Cruz local in the above analysis, could also be distributed between Santa Cruz and Capitola since both communities are served.

Table 5-3: Service Hours of Local Routes (by Service Area)

	Routes	Total	
Santa Cruz	3, 4, 7, 9, 66, 88	12,543	35.9%
Watsonville	74, 75, 79	8,266	23.7%
Scotts Valley/ Graham Hill	31, 32	1,916	5.5%
Capitola/Live Oak	53, 54, 68, 68N	8,719	25.0%
Aptos/Rio Del Mar/La Selva Beach	55, 56	3,482	10.0%
Total:		34,926	100.0%

Intercity service provides 73% of its hours to the Santa Cruz to Watsonville service and the remaining hours to the Santa Cruz to Scotts Valley service as shown in Table 5-4. The intercity routes category has the single highest number of hours apportioned to it. As noted earlier, many of these intercity services provide local/feeder services once they reach the local jurisdiction, however, which are included in the table below.

Table 5-4: Service Hours for Intercity Routes (by Service Area)

	Routes	Total	
Santa Cruz-Watsonville	69, 69A, 69W, 69N, 70, 71, 91	62,749	73.3%
Santa Cruz-Scotts Valley	35, 35A	22,868	26.7%
Total:		85,617	100.0%

## Service Consumed

Table 5-5 below shows that METRO's budgeting of hours closely resembles the ridership distribution on the services. The exception here is the UCSC routes that proportionally have nearly twice the ridership as service hours than the local/feeder and rural routes where the opposite is true.

Table 5-5: Comparison of Service Hours to Ridership

Classifications*	Total Annual Service Hours		Annual Ridership	
Rural	8,972	4.9%	119,426	2.2%
Local/Feeder	34,926	19.1%	731,282	13.3%
Intercity	85,617	46.8%	2,177,489	39.7%
UCSC	36,654	20.0%	2,212,443	40.3%
Regional	16,963	9.3%	244,618	4.5%
<b>Total</b>	<b>183,132</b>	<b>100%</b>	<b>5,485,258</b>	<b>100%</b>

The UCSC routes are the strongest of the routes classifications in terms of ridership. This finding is highlighted in the tables found in Chapter 4. Two of the top three routes in terms of average weekday ridership are UCSC routes (Routes 15 and 16). Field observations and stakeholder discussions also revealed a fair number of pass-ups and standing loads on these UCSC routes.

Aside from the UCSC routes, two intercity routes connecting Santa Cruz to both Watsonville and Scotts Valley also show significant levels of ridership. Route 71 connecting Santa Cruz to Watsonville, is the second highest individual route in terms of ridership in the whole system. Route 35/35A is the fourth highest individual route in terms of ridership in the system and connects Santa Cruz and Scotts Valley.

## Travel Patterns

To no surprise, the travel patterns observed from origin/destination survey results were concentrated along the key east/west (Highway 1) and north/south (Highway 17) travel corridors in the County. The east/west travel pattern between Santa Cruz on the west and Watsonville on the east traversed the Highway 1 corridor. Communities in between these two cities also contributed to the travel between these anchor cities. North/south travel is primarily concentrated along the Highway 17 corridor between Santa Cruz and Santa Clara County to the north.

Linked trips were further broken down by origin location and purpose for analysis. The origin-destination figures in Appendix D show transit trips with origin locations in Santa Cruz, Watsonville, Capitola, and Scotts Valley. Santa Cruz trips show a high percentage remaining local or to the UCSC campus. Origins appear to be concentrated north of Laurel Street and south of Highway 1 with the highest concentrations along the Soquel corridor. Most of the trips originating in Santa Cruz do not extend much past Capitola and Cabrillo College. The majority of trips are school based trips.

Trips originating in Watsonville show travel patterns that are more intercity than Santa Cruz, with high demand destinations in Capitola, Live Oak and Santa Cruz. Origin locations for these trips are concentrated near the Downtown Transit Center and along Main St. and Freedom Boulevard. Trip purposes for those trips originating in Watsonville are much more diverse than Santa Cruz, with significantly fewer school trips and higher percentages of work, shopping and medical trips.

The majority of Capitola trips originated at or near the Capitola Mall on 41<sup>st</sup> Street. These trips are linked primarily to either Santa Cruz or Watsonville, with a few trips going to Cabrillo College and north to Santa Clara County. Trip purposes were diverse and included a combination of school, work and shopping trips.

Scotts Valley showed the lowest number of total trips originating within its boundaries. Trip destinations were split between Santa Cruz and Santa Clara County. Nearly all trip purposes were school, work or medical trips.

Countywide, forty-five percent (45%) of all surveyed trips were school trips and thirty-six percent (36%) were completed for work purposes. Combining these two purposes represented over eighty percent (80%) of all responses in the on-board survey. Figures 5-1 and 5-2 break down school-based and work-based by origin location. Appendix D shows additional origin-destination plots from the on-board survey results.

School-based trips are concentrated primarily between Santa Cruz and Capitola, with noticeable activity between Watsonville and Santa Cruz. UCSC and Cabrillo College appear to anchor the destinations for this activity. Although the majority of UCSC trip origins are located in and around Downtown Santa Cruz, a significant number of trips represent a student body population that is living further away from campus in the communities of Live Oak and Capitola. Cabrillo trips also appear to have a strong attraction to Downtown Santa Cruz and portions of Live Oak and Capitola.

Figure 5-1: Home Based School Transit Trips

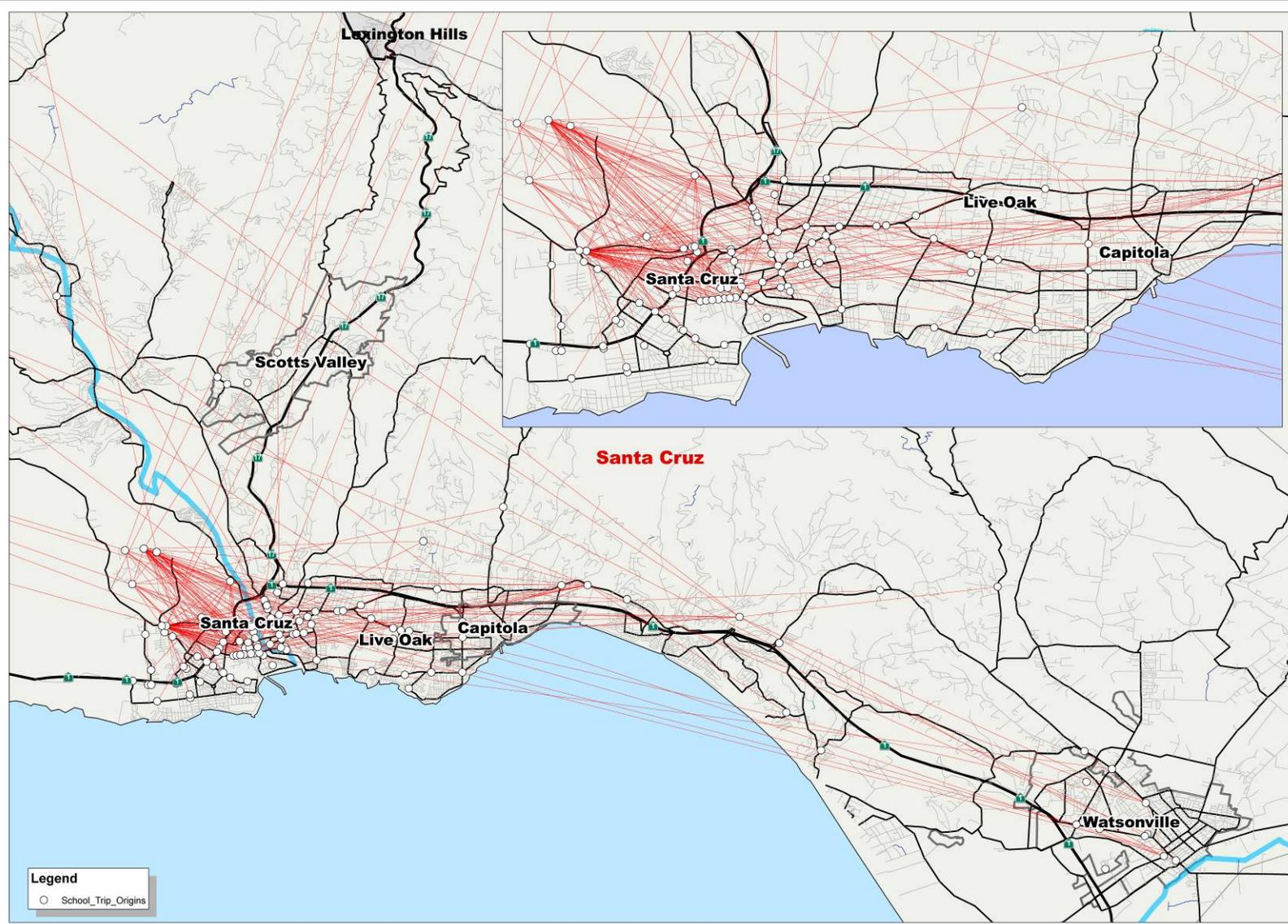
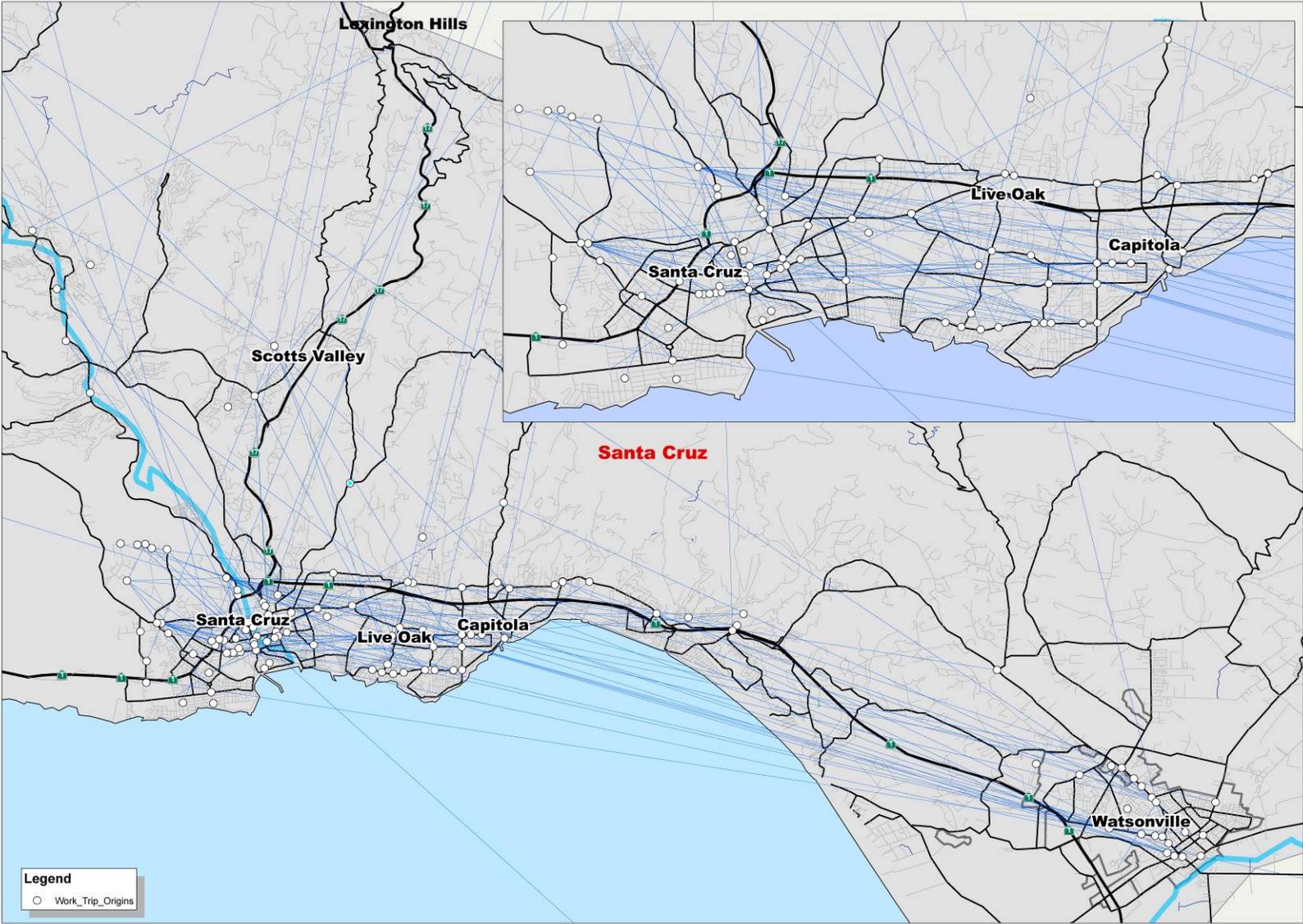


Figure 5-2: Home-Based Work Transit Trips



Work-based trips are much more dispersed than school-based trips. A significantly higher number of trips occur between the communities of Santa Cruz and Capitola/Live Oak and Watsonville and Capitola/Live Oak. Santa Clara County travel is also recorded all along the Highway 1 corridor into Watsonville.

### **Scheduling Practices**

METRO relies on the HASTUS computer scheduling application to create block assignments and driver assignments. Nearly all service (except routes 17 and 71) are currently interlined, creating blocks with a mix of rural, intercity, UCSC and local routes. This process allows for the most efficient use of drivers' platform time based on the route cycles input to the system. While this process may create the most efficient use of driver resources, the rigidity of the system also creates little room for flexibility within the schedule. Small, incremental delays in drive times due to roadway congestion, high loading, etc. can lead to breakdowns with the scheduling process. For example, any delays in the Route 1 corridor could adversely impact local service in Watsonville, which would be the next service provided by that vehicle.

METRO has four different operating periods within its fiscal year where service can be modified and adjusted. Adjustment between these operating periods allows for additional service to be supplied during school terms and to meet the demand of seasonal tourist populations that visit Santa Cruz County. During each of these bid periods, drivers re-select runs composed of various block groups. Priority for run selection is based on seniority of the drivers.

This full service interlining practice was established in 2006 to allow the required number of driver break periods and when those were taken per the Industrial Welfare Commission (IWC). Previously there was less interlining and routes were more restricted to a certain geographic zone or market. This prior scheduling process typically resulted in retaining the same driver and bus in the same part of the County, operating the same type of route. This practice had the advantages of driver familiarity by his or her passengers and potentially made the buses less susceptible to regional traffic delays. The disadvantage was the general driver resource loss in efficiency, adding to overall operating costs of providing transit in the County.

While interlining may optimize agency resources allocated to service, the resulting performance and intuitiveness or understanding of the service can be compromised. As mentioned above, poor on-time performance can be linked to the rigidity of the scheduling which was highlighted as a major concern during nearly all outreach efforts. Thus, uncoupling the interlining practice to allow drivers and routes to operate the same type of daily service would improve on-time performance and allow operations planning to better gauge the estimates of route specific delay, even if this requires additional hours (and thus cost) to cushion the current service.

The uncoupling of service would also support the development of a more intuitive or understandable system for passengers. The current 69, 69A, 69W, 69N grouping and 35/35A services should be simplified into one route so passengers have less detail to filter through when planning their trips. The development of uniform headways which may support a memory schedule for passengers would be more feasible with the non-interlined routes which would also ease the use for passengers.

### **Service Structure**

As discussed, the geography and topography of Santa Cruz County have created a development pattern that is concentrated along the Pacific Coast or Highway 1 corridor in the southern portion of the County. The Highway 17 corridor, linking Santa Cruz County to Santa Clara County to the north, is the other significant connection to growth and development. Transportation and thus transit service are also focused along these key settlement corridors.

The current service pattern operated by METRO is predominately a hub and spoke operations with the hub of activity focused around two primary transit centers in Downtown Santa Cruz and Downtown Watsonville

and two secondary transit centers in Capitola (Capitola Mall) and Scotts Valley (Cavallaro Transit Center). This configuration funnels most passengers through one of these facilities during some point of their trip. Heavy transfer activity is also experienced at these locations due to this structure.

The hub and spoke operation was developed when Downtown Santa Cruz was the hub for region in terms of population and employment. As the County has developed and expanded, the transit system has grown incrementally to meet the new needs of the new growth. Recent and future trends (see figures 2-2, 2-3 and 2-4) show Santa Cruz continuing to be the economic center in County, but show Watsonville as the major center for population and households. Santa Clara County also adds another major employment destination for those living in Santa Cruz County and offers lower cost housing options for those who work in Santa Cruz County.

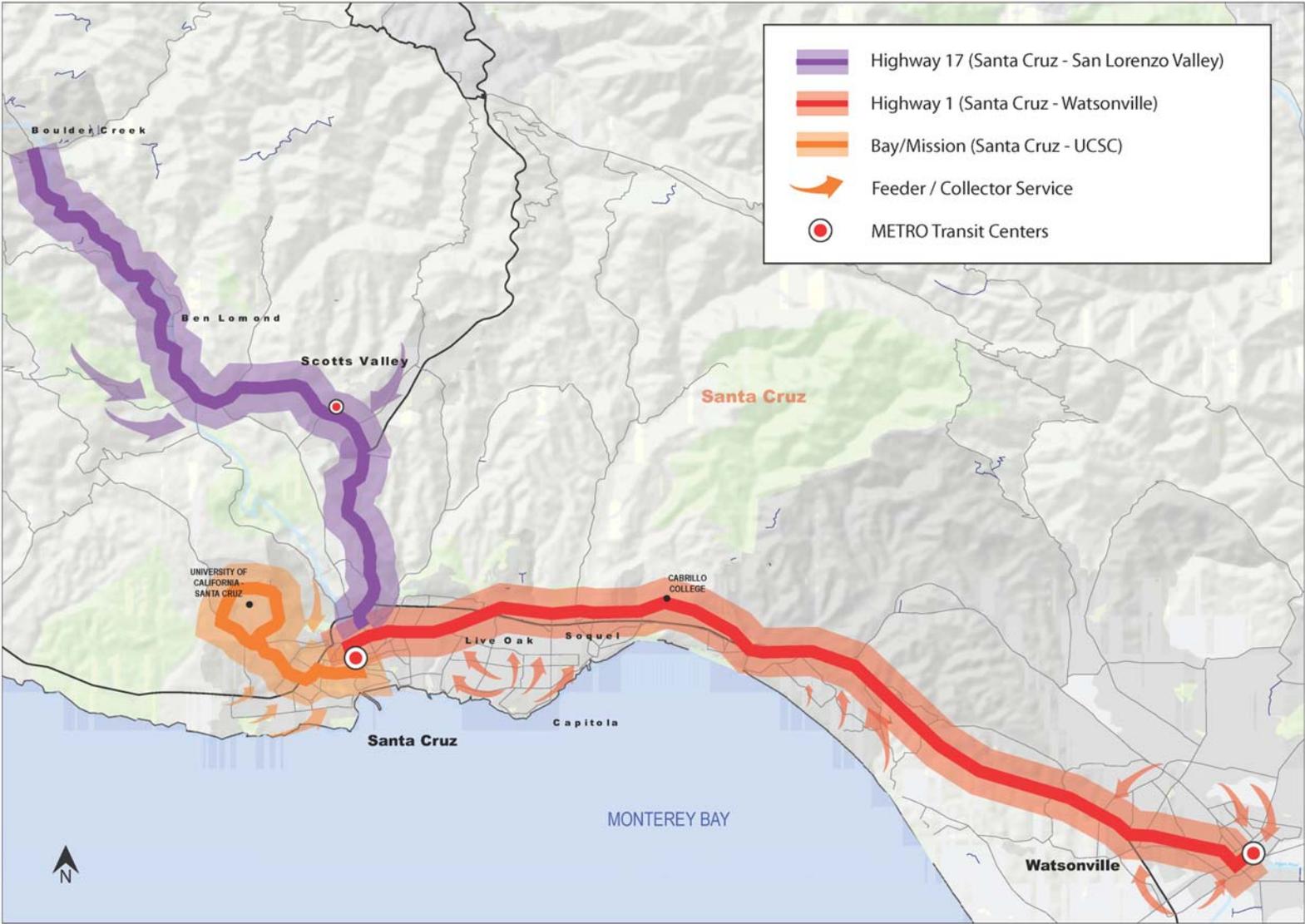
Growth patterns and the topography within the County have also shaped the development of the transit system. Transit-based activity centers are not centered around one central location such as a traditional Downtown employment center. In Santa Cruz County these activity centers are primarily schools and university, hospitals, major shopping centers and business parks which are dispersed among the developed urban areas. Physical barriers created by the ocean and hills and transportation corridors have resulted in a settlement pattern that straddles the Highway 1 corridor from Santa Cruz to Watsonville. The service plan needs to take these development patterns into consideration.

To adapt to this change occurring within and adjacent to Santa Cruz County, METRO should consider a new servicing planning concept that takes a more regional approach to providing transit while focusing on efficiency. This new approach would replace the current hub and spoke operations with a trunk and feeder service. The trunk and feeder concept would allow supply and demand of transit to be more closely matched, thus improving the overall efficiency of the system. This matching of supply and demand is completed by adjusting service levels to target demands within different corridors and areas and adjusting the vehicle types and operations to needs of that area.

A trunk and feeder service would provide the key linkages between the County's major activity hubs through high frequency, high capacity trunk line service. This trunk service would focus on moving high numbers of patrons between major regional centers in an effective and efficient manner. Complementing the trunk line service would be a series of feeder connections that would supply the public transportation needs of the individual community while providing connections to the regional trunk line service. While the trunk line focuses on high capacity and high frequency, the feeder service would focus on reliability and connectivity for its passengers. Vehicles used for this service would ultimately be appropriate for the community based on the infrastructure and the desires of the community. Stop locations would be convenient for the majority of residents in the communities and on-time performance would be stressed to ensure patrons will have confidence in the system and do not get stranded in areas where service is less frequent.

Figure 5-3 shows the basic structure of the trunk and feeder concept. The east/west trunk would run along the Highway 1/Soquel Ave Corridor while the north/south link would operate along Highway 17, Mt. Hermon Road and Highway 9. A third trunk service would operate from the Santa Cruz Metro Center to UCSC to meet the high ridership needs of the campus community. Feeder service would be supplied to the communities within the County along these corridors. Those communities not located along the trunk line corridor would be provided a lifeline transit service that falls under the "rural" classification of services.

Figure 5-3: Proposed Trunk and Feeder Concept Map



## PROPOSED TRUNK AND FEEDER CONCEPT

Subsequent to the preparation of the Service Improvement Program economic conditions have substantially changed. In addition, several policy issues were raised by the Board as described in Chapter 7. The proposed service plan will be reviewed in a subsequent SRTP or planning study and would be phased into operation as resources allow and demographic changes occur. The following description of the plan contains the following proposed trunk lines and feeder services:

- Santa Cruz – Watsonville (Trunk Line)
- Santa Cruz – UCSC (Trunk Line)
- Santa Cruz – San Lorenzo Valley (Trunk Line)
- Santa Cruz Local (Feeder Service)
- Watsonville Local (Feeder Service)
- Scotts Valley/Graham Hill (Feeder Service)
- Capitola/Live Oak Local (Feeder Service)
- Aptos/Rio Del Mar/La Selva Beach (Feeder Service)

### Santa Cruz - Watsonville (Trunk Line)

#### Overview

Santa Cruz to Watsonville accounts for a significant percentage of current ridership and service. With Watsonville anticipated to surpass Santa Cruz in total population by 2015, demands from this travel market are anticipated to increase. Infrastructure constraints along this corridor can be viewed as both opportunities and impediments for future METRO service. Impediments lie in the current congestion that is experienced along Highway 1 during the peak travel periods. This delay increases bus travel time and creates a high degree of variance that makes bus operations difficult to schedule, leading to poor on-time performances. Depending upon the future actions within the County, opportunities may exist to speed up bus operations and make transit a more desirable mode of travel for regional commuters. Even with the current operating conditions, a trunk line service across the County is necessary to provide a backbone of service connecting the County's major activity centers.

Routes 69, 69A, 69W, 69N, 71, and 91 serve the current Santa Cruz to Watsonville corridor. Route 91 is the express route offered only during peak periods that operates along the longest stretch of Highway 1 and has the least number of local stops and thus the lowest travel time between the Watsonville Transit Center and the Santa Cruz Metro Center – 31-50 minutes. Route 70 operates between Cabrillo College and Downtown Santa Cruz along the Soquel Avenue corridor. Route 69 operates between the Downtown Metro Center and Capitola Mall along Soquel Avenue and Capitola Road. Route 69N provides nighttime service between Cabrillo College, Capitola Mall and the Downtown Metro Center.

#### Scheduling

Current interlining practices have the 69, 69A, 69W, 69N, or 91 operating at least one run in 38 different blocks. The nature of these long routes and tight scheduling practices create plentiful opportunities for delay to occur during these trips. Often times these will be scheduled at the beginning or in the middle of the blocks, causing the coupled local routes to become delayed due to intercity route portion of the block.

Scheduling of the 71 is done differently within the HASTUS program. Rather than adding all of the route's runs to the pool of possibilities of other lines, the 71 has been interlined with itself with a number of blocks. This process assigns one bus to do only route 71 trips during the driver's shift.

### Service Characteristics

These strong ridership routes have relatively high passengers per service hour and revenue hour. Trips on these routes are focused more on work and medical trips and less on school trips. UCSC and Cabrillo students make up only about 5% of the total ridership and bike and wheelchair passengers are relatively minimal.

### Service Delivery

The Santa Cruz to Watsonville corridor is currently well served compared to other areas within the County. A trip between the Metro Center in Santa Cruz and the Watsonville Transit Center during the weekday can be made every 30 minutes on the 71 or 69A/69W routes which combine to offer four trips per hour. Frequencies of route 71 increase between 2 PM and 7 PM to 15 minute headways, creating six trips per hour between the two services during this time. These services start prior to 6 AM and run past midnight, delivering a span of service over 18 hours. Route 91 adds a few additional peak hour services along the corridor. Weekend service is provided every 30 minutes by the 71 and 69A/69W services between the hours of 6 AM and 11:30 PM. One AM trip from Watsonville Transit Center is offered on Route 91 during the weekend. Again, these staggered schedules create a near 15-minute frequency.

### Restructuring

The trunk line service should have the highest levels of service of any of the routes in the system. While the current routes combine to offer a fairly high level of service along the corridor, the different deviations taken between the two transit centers and various sub-markets serviced by these routes requires significantly higher hours to be allocated to the corridor. The overall restructuring concept would create a frequent and direct service that would still allow a one-seat trip to occur for the majority of riders within this corridor.

The short-term routing modifications of this trunk line service should be a hybrid of the current Routes 71 and 91. From Santa Cruz Metro Center, the service would take Front Street and River Street to reach Water Street. Water Street would be taken to Soquel Avenue where the service would turn and follow Soquel Avenue to Dominican Hospital and Cabrillo College. The service would remain on Soquel Drive until State Park Drive where it would merge onto Highway 1 and continue until the Main Street exit in Watsonville. Service would follow Main Street to Rodriguez Street and the Watsonville Transit Center. Running time of this service is estimated to be around 70 minutes, with higher run times in the peak and lower times during the off-peak and weekend periods.

Currently, peak hour traffic creates travel speeds and travel times on the freeway that are similar to those on the adjacent arterial streets. Without the advantages of travel time savings, it is logical to operate transit along the arterial network in the corridor including Main Street, Soquel Avenue, and Water Street. If changes occur along this corridor that make bus operations more efficient along Highway 1, the service strategy should adapt to include longer portions of running way along the high capacity freeway.

The most significant change in service along this corridor will be the absence of a direct connection to the existing transit center at Capitola Mall. This  $\frac{3}{4}$  mile deviation from Soquel Drive would add significant travel time between Watsonville and Santa Cruz, especially with the new retail development at Soquel Avenue and 41<sup>st</sup> Street. This increase in travel time and reduction of travel speed would compromise the goal of the trunk line system. Local or "feeder" services between Soquel Avenue and the Capitola Mall along 41<sup>st</sup> Street and Capitola Road would need to be added with the removal of these 69 routes. The new service should be frequent enough to adequately meet the demand of these transit riders.

## Proposed Trunk Line Operation

Based on above operating conditions and service improvement goals, estimates to provide 10 minute peak/15 minute off-peak service and 15 minute night service during the weekday and 15 minute frequencies throughout the day on the weekends would require approximately 60,000 service hours. This assumes an 18 hour span of services during all days of the week. In 2007, Routes 69, 69A, 69W, 69N, 71, and 91 were allocated nearly 63,000 annual service hours, or 34% of the system total. Thus, there would be an additional 3,000 hours available following the implementation of the new trunk service.

In addition, gaps in local service, specifically in Capitola and the connection to the Capitola Mall would be created by the removal of these services. These gaps would either need to be replaced by modifying or extending Routes 53, 66 or 68 or adding new local shuttle service that would connect Water/Soquel, the Capitola Mall, and 41<sup>st</sup>/Soquel. A new service, operating on 30 minute headways would need an additional 10,000 hours. An extension of one of the existing services would vary but all services would have to be upgraded from their current 60-120 minute frequencies to 30 minute frequencies, resulting in significantly more hours of service.

Advantages of the trunk line service over the existing routes along this corridor would come from the more uniform scheduling of the service and anticipated reduced confusion experienced by the passenger. It would appear that as METRO continually looks for ways to improve its service, it should consider adding a limited stop or other type of rapid service along this corridor. This service would take the same alignment as the intercity service but stop at fewer locations and reduce the overall travel time for passengers traveling between the major destinations along the corridor. Adding Transit Signal Priority (TSP) and queue jumps at congested intersections could also increase performance of the operation.

A longer term service strategy could come from improvements along the Highway 1 corridor between Watsonville and Santa Cruz. The addition of a high-occupancy vehicle (HOV) lane would allow METRO buses to increase travel speeds and make it more efficient to operate along longer portions of the highway. Another future option for the corridor would be to operate buses along the shoulder of Highway 1. Agencies in ten states across the country are currently operating successful examples of this type of operation. Conditions typically needed for operating buses on shoulders include congestion along the highway, an express bus service and a minimum of 11 foot lanes. Buses commonly only use the shoulder only when travel speeds decrease below 35 mph and do not exceed this speed limit when using the shoulder. San Diego Metropolitan Transit System is the only current example of this type of operation in California. If it appears Highway 1 will not include a dedicated high-occupancy vehicle lane in the future, Santa Cruz METRO should consider a study to assess the feasibility of bus on shoulder operations.

## Santa Cruz - UCSC (Trunk Line)

### Overview

The single largest market for transit ridership in the system is the UCSC student, faculty and staff population. The 2005 Long Range Development Plan by the University calls for significant future growth in both students (+5,100) and faculty (+980) over the next 15 years. A high percentage of students and most faculty live off-campus in Santa Cruz and the surrounding communities. The University is also geographically placed at a higher elevation than Santa Cruz, making travel between these two locations difficult for non-motorized modes. This displacement along with tight restrictions on personal vehicle parking makes the University a prime market for transit activities.

METRO currently provides eight routes that can be classified as UCSC serving routes. Although four of these eight routes operate only during school terms, their total service hours are 20% of METRO's annual totals. Nearly 40% of all service hours on the UCSC routes are dedicated to Route 16 which operates seven days a week with average headways of 10 minutes during the peak. The night service provided by Route 16

creates a span of service from 6:30 AM to 2:00 AM during the weekday and 6:30 AM to 3:00 AM on the weekend. This service follows the most direct corridor from the Downtown METRO Station to the campus along Laurel Street, Mission Street, and Bay Street and circulates counterclockwise when arriving on campus.

Routes 12, 13, 15 and 19 provide similar services to that of the Route 16 with slight differences. Route 12 only operates once a day (Monday-Friday) and extends beyond the Downtown METRO center to serve the eastside of Santa Cruz and the Capitola Mall. Route 13 runs along Walnut Street instead of Laurel Street to access Mission Street, does not provide weekend or late night service, and runs a clockwise route through campus. Route 15 also operates clockwise when reaching campus and does not operate on weekend or night service. Route 19 offers seven day service and night service but uses Pacific Street, Beach Street and Bay Street instead of Laurel Street and Mission Street, adding service from the beach area to campus.

Routes 10 and 20 also connect the Downtown METRO Center and the UCSC campus but enter the campus on routes other than Bay Street. Route 10 is a seven day service that connects the Downtown METRO Center to the UCSC campus but uses High Street instead of Bay Street to enter campus. This service adds additional local service to the northern areas of Downtown Santa Cruz. Route 20 is a seven day service that runs along Delaware Street in the southern portion of Santa Cruz and enters the campus via Western Drive. This alignment provides the campus's Westside service.

## Scheduling

Most of the routes serving UCSC from the Downtown METRO Center are scheduled by HASTUS to make a roundtrip in approximately 45 minutes. The interlining scheduling uses these rather short trips in one of 72 different blocks currently assigned. While some of these blocks are entirely composed of UCSC routes, many are mixed in with intercity routes. Although this scheduling technique may maximize systemwide resources, it can often lead to irregular headways and poor on-time performance for those students and faculty relying on these routes to get to class and work.

## Service Characteristics

Systemwide the UCSC routes are the highest in terms of ridership, even though some operate only during school terms. Farebox recoveries are nearly twice all other categories of routes and passengers per mile and per hour are three to four times higher than other routes. Overall, these routes are clearly the most productive for METRO. Eighty-seven percent of use on these routes was attributed to UCSC students and faculty.

## Service Delivery

During school terms, the UCSC to Downtown Santa Cruz corridor (Bay Street-Mission Street-Laurel Street) has the highest frequency and longest span of service of any area in the County. Headways for routes between these key locations during the peak are less than 10 minutes. Service starts at 6:30 in the morning and runs to 2:00 AM during the weekdays and to 3:00 AM on weekends. Exceptions are campus service along High Street which terminates at 7:00 PM and service to the Westside ends around 9:00 PM.

These high frequencies during the school hours allow passengers riding these services to not have to rely on set schedules and are less sensitive to irregularities in headways and poor on-time performance. It can be assumed that the wait time for a bus serving these markets is rarely longer than 10 minutes. Although frequencies may not be as much of an issue on UCSC service, standing loads and pass-ups resulting from full loads are experienced on these popular routes, even with the high levels of service deliveries.

## Restructuring

The UCSC corridor is a prime candidate for the identification of trunk line service due to its high ridership and major trip generators on both ends of the line. The current levels of service provide high frequencies

from the Downtown METRO Center to UCSC but offer many deviations. The proposed trunk service would consolidate existing resources on the Laurel Street – Mission Street – Bay Street corridor to a uniform service and allow the existing UCSC and Santa Cruz local services not along this corridor to meet the trunk at key transfer locations. Once on campus, the service could either take a clockwise or counterclockwise loop. This alignment would mimic either the Route 15 or 16.

### **Proposed Trunk Line Operation**

The UCSC trunk line service should meet the needs of the student body whose travel demands are primarily during the weekdays between the hours of 7:00 AM and 7:00 PM. METRO should consider defining these hours as the peak for UCSC services and operating service from 6:30 AM to 3 AM seven days a week. The proposed trunk line operation should operate every 10 minutes during this peak service time and 15 minutes during the off peak and weekend times.

Operating service along this single trunk line corridor at the above defined frequencies and spans of service would take approximately 25,000 service hours. Routes 13, 15 and 16 alone, which traverse the same alignment as the proposed trunk line service currently consume over 20,000 service hours. An additional 5,000 hours would result from the consolidation of these three routes and still keep other UCSC routes that service the campus via High Street and Western Drive.

The current schedule shows a roundtrip travel time of approximately 45 minutes from the Downtown METRO Center to Science Hill on the UCSC campus and back. METRO, along with UCSC, should investigate improvements along this corridor that could reduce this time to closer to 35-40 minutes. These small improvements in travel time could result in significantly more service through this corridor.

## **SANTA CRUZ - SAN LORENZO VALLEY/SANTA CLARA COUNTY (TRUNK LINE)**

### **Overview**

Aside from the developed areas along the Highway 1 corridor, the most significant concentration of population, jobs and housing are located in a number of relatively small communities north of Santa Cruz in the San Lorenzo Valley. Included in these communities are Scotts Valley, Ben Lomond, Felton, Brookdale and Boulder Creek. These communities are linked to the rest of the County through Highway 9 and Highway 17. Highway 17 continues north from Santa Cruz County to connect to Santa Clara County and the metropolitan area of San Jose.

Route 35/35A provides the backbone of service from Santa Cruz to the San Lorenzo Valley. The service runs from the Downtown METRO Center north to Highway 17 (via Front Street –River Street-Water Street-Ocean Street) and exits at Mt. Hermon Road in Scotts Valley. (Route 35A runs the same alignment except it continues one exit further north on Highway 17 to the Granite Creek Rd. exit.) After serving the Cavallaro Transit Center, the service continues along west on Mt. Hermon Road to Graham Hill Road eventually turning north on Highway 9 to serve the communities of Felton, Ben Lomond and Boulder Creek. A number of variations of the 35 and 35A route take passengers to various locations throughout the Valley including as far north as Big Basin State Park.

Four other routes supplement the Route 35 service in San Lorenzo Valley but provide very few trips. In total, these four routes contribute an additional 12 daily weekday trips that are primarily focused on high school students' trip needs. Routes 31 and 32 create a loop through Scotts Valley from the Downtown METRO Center using Highway 17 for either the northbound or southbound direction and Graham Hill Road for the opposite direction. Routes 33 and 34 never leave the Valley and start and end at Felton Faire along Graham Hill Road.

The growth in the region's economy in Santa Clara County and the availability of other regional and national transportation modes not found in Santa Cruz (Amtrak, Caltrain, International Airport, etc.) have created a transportation need between the two counties that METRO has filled with the Highway 17 Express bus service. This service was originally implemented following the earthquake in 1989, which has steadily grown in ridership, and is quickly becoming one of the most productive routes in the system.

The topography and infrastructure in the San Lorenzo Valley provides challenges for METRO drivers. Narrow rights-of-way and sharp turning radii make this service difficult to operate with traditional 40 foot buses.

### **Scheduling**

Routes 31, 32 and 35/35A are, for the most part, interlined with other services including intercity and UCSC services. This interlining is possible because these three routes all start and end at the Downtown METRO Center. The other routes servicing the San Lorenzo Valley and Santa Clara County do not all start and end at the Downtown Center. Scheduling of these routes are all done within their own blocks, similar to the previously cited route 71 example.

### **Service Characteristics**

The San Lorenzo Valley routes have lower ridership and are overall lower performing routes compared to its peer routes servicing major corridors in the County. The rural setting in which these routes operate makes it difficult to compete with other routes in terms of productivity. These routes do, however, provide necessary transit service to a significant portion of the County, meeting other performance goals of METRO.

The Highway 17 service to Santa Clara County is supplying one of METRO's fastest growing markets and efforts should be made to continue its use. The service is currently commuter-based but its connectivity to other transportation options which provide links to the San Francisco Bay Area and the East Bay attract multiple users to the service. The lengthy trip duration on this route makes it more sensitive to standing loads and pass-ups. A high level of bike use is also experienced on the Highway 17 service, highlighting the importance of adequate bike storage on this service.

### **Service Delivery**

Route 35/35A currently operates 30 minute service from 6:30 AM to midnight during the weekdays and every 30 minutes from 7:30 AM to midnight on the weekends. Although this route is classified as an intercity route, the majority of local service to the San Lorenzo Valley communities is delivered by this route. Aside from route 35/35A, service to these parts of the County is limited to a few AM and PM peak hour trips.

Service to Santa Clara County on the Highway 17 express service occurs approximately every hour with peak hour periods having 20-30 minute frequencies. Five AM trips to Santa Clara County are currently offered from the Soquel and Highway 1 Park and Ride lot that do not service the Downtown Metro Center and two AM trips are offered from the Metro Center that do not serve the Park and Ride lot. Inbound service in the PM has a selected four trips that serve Scotts Valley Drive. Outbound trips from Santa Cruz County are scheduled to allow transfers to the VTA, ACE and Amtrak commuter and regional rail services.

### **Restructuring**

Increasing transit demands and traffic congestion along the Highway 17 corridor makes it a prime candidate for high frequency transit service. The trunk line service running to the San Lorenzo Valley should mimic the current 35/35A alignment but terminate in the north at the intersection of Highway 9 and Lomond Street in Boulder Creek. Frequencies and span of services on the 35/35A would be improved to provide a higher level of transit service to the San Lorenzo Valley. It appears that the current Highway 17 Express service would not be included in the trunk recommendation due to the different fare structure and vehicle fleet needs.

However, opportunities to increase operations along Highway 17 and avoid any future congestion should be explored. These improvements, including designation of HOV lanes during peak hours or operating on the shoulder, would benefit both services operating in this portion of the trunk line corridor.

It should be noted that the proposed trunk service between Santa Cruz and Watsonville would serve the existing Soquel Park and Ride lot, allowing a connection to the Highway 17 service at Water and Ocean Street. This would permit the Highway 17 service to operate shorter runtimes and provide more service from the Downtown METRO Center. Currently, there is a gap in the AM peak from 6:45 to 7:30 where no Highway 17 Express buses operate from the Downtown Center. Service could be added during this critical travel time with the new trunk and feeder system.

### **Proposed Trunk Line Operation**

If the existing 35/35A were transitioned into a high frequency trunk line service, the concept would be to operate 16 hours during the weekday and 14 hours during the weekends with frequencies of 15 minutes during the weekday and 30 minutes on the weekend. Currently, nearly 23,000 service hours are assigned to the Route 35/35A. Estimates of providing 15 minute weekday and 30 minute weekend frequencies along this corridor would be just over 40,000 hours. This would require a significant increase in hours to achieve.

Given the high demand for service in the previous two corridors, it would appear that consideration for trunk line status in this corridor would have a lower priority and be based on an ongoing review of demand including another transfer point at Water and Ocean referenced above as well as in Scotts Valley at the Cavallaro Transit Center on Kings Village Road. This park and ride lot would be the preferred location of a transfer location to the commuter drive-in populations. Future efforts should look to improve the location of this transfer point, moving it closer to Highway 17 and requiring less deviation for the Highway 17 service.

Highway 17 Express service should be focused in the near term for operational improvements. Additional peak hour trips from Downtown Santa Cruz to San Jose should be added as resources become available. It is estimated that two additional AM and PM trips in both directions would require approximately 2,200 hours of new service.

### **FEEDER SERVICES**

Feeder services will provide the key links for transit users with origins and destinations outside the three trunk line services. These services will focus less on speed and capacity and more on reliability and proximity to ensure passengers are not waiting excessively long for a bus or having to walk uncomfortable distances to reach a bus stop location.

The results of the outreach showed a significant challenge for METRO is its ability to run reliable service. This is currently being evaluated by METRO with a recent technological upgrade that will allow a more precise runtime to be calibrated for each route. These runtimes will then be applied to the scheduling process to create a more precise scheduling match. While this process is anticipated to improve reliability and on-time performance, it will likely require a “cushion” to the existing service to a point where runtimes are accurate. The point has been made that improving the reliability of the existing service should be accomplished before other service improvements are implemented.

In addition to cushioning the existing service, feeder routes may also consider a restructuring to allow more connectivity to key transfer points along the trunk routes. Table 5-6 below shows where these key transfer points are anticipated to occur along these new services. Upgrades may need to occur at some of these locations to ensure adequate passenger facilities are available.

Table 5-6: Key Transfer Locations from Feeder to Trunk Services

Santa Cruz – Watsonville	Santa Cruz – UCSC	Santa Cruz to San Lorenzo Valley
Watsonville Transit Center (Watsonville)	Bay & High (Santa Cruz)	Highway 9 & Lomond (Boulder Creek)
Green Valley & Main (Watsonville)	Bay & Mission (Santa Cruz)	Felton Faire (Felton)
Cabrillo College (Aptos)	Downtown METRO Center (Santa Cruz)	Cavallaro Transit Center (Scotts Valley)
Soquel & 41st (Capitola)		Downtown METRO Center (Santa Cruz)
Soquel & Capitola (Santa Cruz)		
Water & Ocean (Santa Cruz)		
Downtown METRO Center (Santa Cruz)		

The service improvement program focuses on implementing a strategy to phase in the trunk and feeder concept with minimal disruption on the existing routes. Very few changes to the existing local routes are suggested as part of this plan. However, the SRTP does outline a performance monitoring plan that can be used by METRO staff to assess how service is being delivered/consumed and allow modifications to be considered based on performance. While this process may not result in immediate service changes in the next fiscal year, future changes should result in improved efficiency and effectiveness.

## FARE RELATED ISSUES

The trunk and feeder system service plan is designed to help improve the availability of transit and improve operational efficiencies for METRO, but the new system will also logically result in an increase in transfers for passengers. As a result there will be fare related implications that will logically be necessary to address, similar to the development of specific performance measurement techniques.

As background, the current METRO fare structure requires passengers to pay (\$1.50) every time they board. Thus an increase in transfers creates an increase in cost of transit. A day pass is also currently offered priced at the cost of three one-way trips (\$4.50) which encourages passengers to purchase a pass if a roundtrip trip is needed and transfers are required. A five day pass (\$22.00) and monthly passes (\$50.00) are also available which allow unlimited rides during their respective time periods. Pre-purchased passes of any type not only reduce the cost of riding for transit passengers but also reduce dwell times for transit during boarding/alighting, thus reducing overall travel times.

There are a number of possibilities METRO could pursue with the implementation of the new trunk and feeder concept. Since the concept would be implemented gradually, METRO could consider modifications to the day pass such as reducing the day pass slightly to encourage more riders to purchase this form of media.

METRO may also need to revisit and possibly restructure its contract with Cabrillo College and UCSC that reimburses METRO on a per trip basis for riders completed by students and staff. Thus increasing the number of transfers would also increase the number of billable trips.

## PHASING

The financial analysis presented in Chapter 6 details the amount of funding and estimates of future revenue sources for METRO. To fully implement the proposed trunk and feeder concept, additional financial and staffing resources will be needed. The proposed service hours column in Table 5-7 shows estimated hours that METRO can expect to add in each of the five fiscal years based on future revenue estimates compared to FY07-08.

Table 5-7: Estimated Service Hours (FY09-FY12)

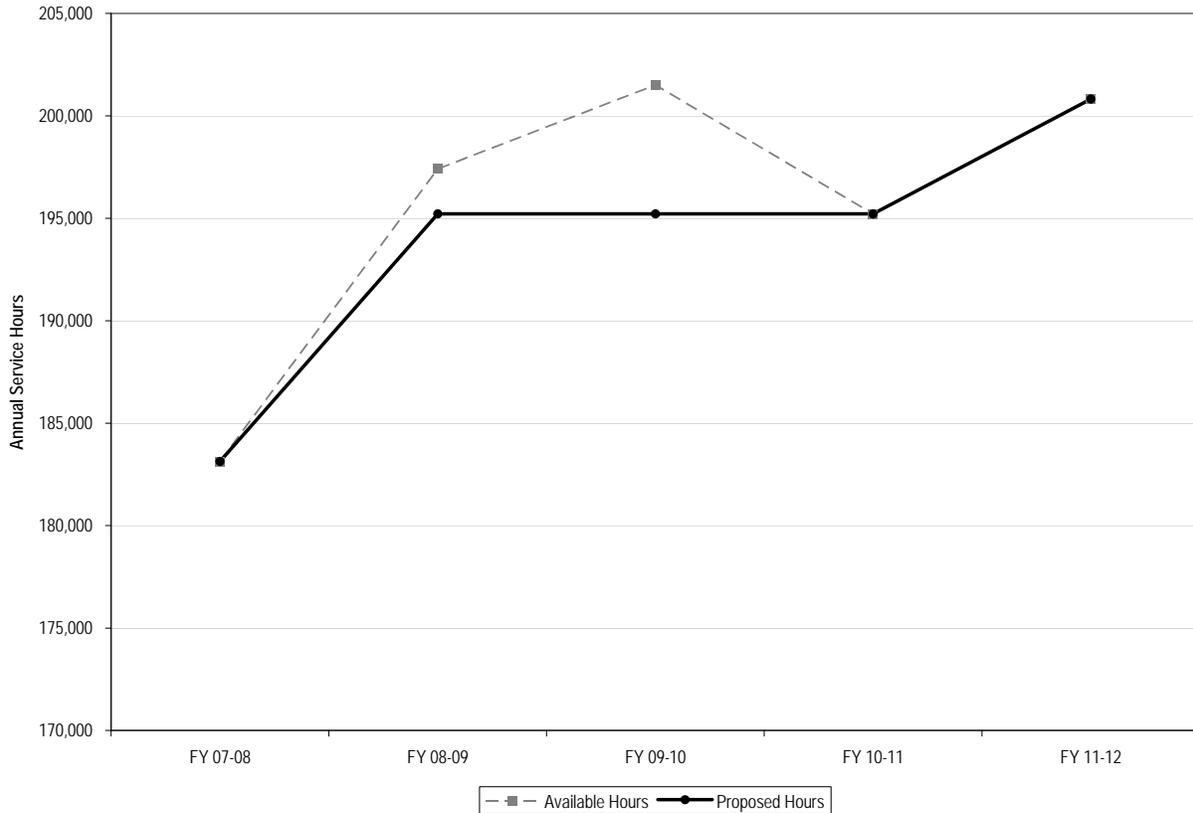
Year	Estimated New Revenue (from year previous)	Estimated Change in Service Hours* (from year previous)	Proposed Service Hour Allocation
FY 08-09	\$ 2,855,752	+14,279	~ 12,000
FY 09-10	\$ 818,967	+4,095	0
FY 10-11	\$ (1,257,497)	-6,287	0
FY 11-12	\$ 1,121,076	+5,605	~5,000

\* Estimates for future service hours were determined using a future rate of \$200 per service hour. Current rate are closer to \$180 per service hours but projections for future expenses estimated by METRO show these costs rising in future years.

Revenues shown in Table 5-7 are based on the METRO's financial projections for FY 08-09 and FY 09-10 and Option 2 of the consultant's recommendations which are fully detailed in the Financial Analysis (Chapter 6) chapter of this report. These trends show increasing revenue streams for FY 08-09, FY 09-10 and FY 11-12 and a decrease in FY 10-11 primarily due to the loss of operating reserves that are expected to be used in FY 08-09 and FY 09-10.

The proposed service hour allocation identifies how much new service would be delivered based on the revenue projections through FY 11-12. Since resources will fluctuate over the next four years, service should be phased to assure future service cuts will not need to occur if resources are anticipated to be reduced. For example, since a reduction in revenues is programmed in FY 10-11, it would be illogical to add the maximum number of service hours available during FY 08-09 and FY 09-10 and then reduce those hours the next year. Figure 5-4 shows how the proposed hours compare to the available hours through FY 10-11 using the assumption that FY 07-08 hours will equal those reported in FY 06-07. This future analysis does not consider any carryover of unused revenues that may be transferred from one year to the next.

Figure 5-4: Proposed Service Hours Allocation vs. Available Hours



A number of the modifications suggested in the service improvement program can be completed through restructuring of service that do not require additional service hours while others are dependent upon new financial resources. Table 5-8 shows the various phases of implementation, their anticipated service hours, and suggested time of implementation. Based on input from METRO staff, the initial priority would be to restore a higher level of reliability to the existing service. An estimate of 1.5% of the total service hours from FY07-08, or nearly 2,750 service hours, would be allocated for these purposes in FY 08-09.

Table 5-8: Proposed Phasing Timeline

Service Improvement	Estimated New Hours Needed	Hours Allocated			
		FY 08-09	FY 09-10	FY 10-11	FY 11-12
Restore Reliability of Existing Service	2,750	2,768	0	0	0
Highway 17 and Weekend Service	2,200	2,200	0	0	0
Santa Cruz-Watsonville Trunk	7,000	7,000	0	0	0
Santa Cruz-UCSC Trunk	5,000	0	0	0	5,000
<b>Total</b>	<b>16,100</b>	<b>11,968</b>	<b>0</b>	<b>0</b>	<b>5,000</b>

Once these current reliability issues are addressed, another relatively minor adjustment would be to allocate additional peak hour service on the Highway 17 Express service. Although this route includes multiple funding partners and, to some degree is almost a separate service, increasing demands on this regional service support consideration of improvements to this route. Resources available in FY 08-09 should be sufficient to make these improvements.

The Watsonville to Santa Cruz conversion to a trunk service, which would be a major change to service delivery, can be completed if nearly all existing hours on the Santa Cruz-Watsonville intercity routes are allocated. The connection between this trunk service and Capitola Mall would need to be replaced by a new local service or upgrading the existing local services. In total, approximately 7,000 additional service hours would be needed to implement this trunk line service and supporting local service improvements. Based on the estimated operating revenues available to METRO, this implementation could occur in FY 08-09.

The next priority would be strengthening the UCSC to Downtown Santa Cruz connection. An estimated 25,000 hours would be needed to run 10 minute weekday and 15 minute weekend service. Consolidating the existing routes 13, 15 and 16 hours into this service, an additional 5,000 hours would be needed. These hours are anticipated to be available by FY 11-12.

The final trunk line running from Santa Cruz to San Lorenzo would require the most hours of new service. It is estimated that these hours would not be available to implement this service over the duration of this service plan but should be considered for future planning efforts.

## CONCLUSION

METRO is currently working to develop solutions to improve the existing system and alleviate issues with reliability and on-time performance. Once resources have been used to address these existing issues, METRO should look to build upon its regional and intercity connections. Table 5-9 shows how future resources could be allocated based on estimates for available service hours.

Table 5-9: Allocation of Service Hours (FY08-FY13)

Classifications	Type	FY 07-08*	FY 08-09	FY 09-10	FY 10-11	FY 11-12
Rural	Existing	8,972	9,100	9,100	9,100	9,100
Local/Feeder	Existing	34,926	45,500	45,500	45,500	45,500
Intercity	Existing	85,617	23,900	23,900	23,900	23,900
UCSC	Existing	36,654	37,200	37,200	37,200	17,200
Regional	Existing	16,963	19,400	19,400	19,400	19,400
<b>Santa Cruz-Watsonville</b>	<b>New Trunk</b>	<b>0</b>	<b>60,000</b>	<b>60,000</b>	<b>60,000</b>	<b>60,000</b>
<b>Santa Cruz-UCSC</b>	<b>New Trunk</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>25,000</b>
Total Allocated		183,132	195,100	195,100	195,100	200,100
Total Available		183,132	197,411	201,506	195,219	200,824

\* Anticipated year end FY 07-08 data assumes the same service hour as that reported in FY 06-07.

The trunk and feeder service plan concept would also allow METRO to formally identify and prioritize transit corridors within the County to help increase operational efficiencies and, for example, begin to identify locations for future transit-supportive development. This could include seeking local jurisdictions support in including these corridors in their planning processes and also potentially incorporating a land use policy to focus transit-supportive uses and densities along these corridors. As indicated previously, consideration of

transit-preferential treatments along these corridors, including bus stop improvements, signal priority and rights of way, should be considered.

## ANCILLARY ISSUES

Although not directly related to service improvement, there are several other issues and/or recommendations that are included in this chapter, including organizational structure recommendations and a discussion of the complementary paratransit service.

### Organizational Structure

During the stakeholder meetings there was substantial input from other agency staff regarding the need for an additional staff person that could work with these agencies, especially regarding planning issues, that would provide additional policy level input similar to that received from the General Manager or Assistant General Manager.

In addition, as part of the internal review of agency functions and responsibilities, it appeared that the ability to move forward with some planning, policy and process activities was also impacted by the availability of the GM or AGM to review and act on all issues and activities. Furthermore, there also appeared to be an opportunity for a senior level person to interact more directly with Operations personnel regarding scheduling, routing and issues related to interface with operators.

Finally, if the service improvement program recommendations are implemented there will be an increased demand for internal coordination, external communication and interagency connectivity. Thus, it is recommended that a Planning Manager position be added to the Office of the General Manager, which would perform the functions discussed above and supervise the existing Transit Planner, Transit Surveyor, Planning Intern as well as the Grants/Legislative Analyst.

In addition, this position would take the lead in the internal development of the SRTP process, including such activities as providing the updates regarding the performance measurement recommendations, the planning and process interaction of any new or modified technological programs and coordination with the paratransit program.

### Complementary Paratransit Plan

As discussed with senior management at the outset of the SRTP, the focus of this analysis was the fixed route service. As such, the current operations and activities of the ParaCruz service have not been analyzed. Those activities and operations could be affected, however, by the implementation of the service improvement program in several ways.

First, since the requirement to provide ADA complementary paratransit for those persons with disabilities that cannot access the fixed route system is directly linked to the routing and span of service of the fixed route system, any increase or decrease in service as a result of the service improvement plan could also affect ParaCruz availability. Also, if some flexible destination services were implemented as part of the feeder service concept, then it could be possible to combine the ADA paratransit clientele and other passengers by offering curb to curb operation. Clearly, additional planning would be required in order to conceptualize any operational modifications. However, the cost for modifications to the fixed route service should also take into account a similar impact on the paratransit service and should be included in the overall service improvement plan.

# CHAPTER 6: FINANCIAL ANALYSIS AND CAPITAL NEEDS

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## FINANCIAL ANALYSIS

The purpose of this chapter is to develop an operating revenue forecast and identify capital needs for the Santa Cruz Metropolitan Transit District's Short Range Transit Plan. The annual operating revenue forecasts described in detail below were used in the development of the service plan outlined in the previous chapter.

As described below, the operating revenue forecasts were developed based on a review of: historic data, the region's current economic conditions, and short range revenue forecasts developed by Santa Cruz Metropolitan Transit District (METRO) staff. Based on this review, two alternative operating revenue forecast options were developed and compared to the two projections developed by METRO staff. From this comparison a recommended option was identified. Appendix E contains additional tables to supplement the information found in this chapter.

## SHORT RANGE PLAN OPERATING REVENUE PROJECTION PROCESS

The following is an overview of the historic information used as the basis to develop revenue projections for the FY 2009 to 2012 period. The discussion includes a summary of the data sources researched and reviewed, identification of the agency's key revenue sources, analysis of historic annual growth rates of each key source, and a review of recent trends in local and state sales tax collection.

### Data Sources

The following documents, reports, and spreadsheets were reviewed and analyzed to develop the alternative FY 2009 to 2012 operating revenue forecasts.

- Santa Cruz Metropolitan Transit District (METRO) Recommended Final Budgets: FY 1999 through FY 2007;
- METRO's global monthly ridership statistics spreadsheet for the period July 2002 through September 2006;
- METRO's service hours and miles, by route spreadsheet for the period FY 2004 through 2006;
- METRO's historic sales and use tax levels for the period 1995 to 2006;
- METRO's FY 2005-2006 Fact Sheet spreadsheet;
- METRO's Operating and Capital Budget Framework for the period FY 2007 through FY 2012;
- METRO's National Transit Database (NTD) submittals from the Federal Transit Administration's website for the period 2001 through 2006;
- METRO's archived Board Agenda reports from the agency's website to obtain year end receipt levels for the key revenue sources;
- METRO's March 2008 Draft FY 2009 and 2010 Operating and Capital Budget and the May Revised Draft FY 2009 and 2010 Operating and Capital Budget reports to the Board;
- The City of Santa Cruz Sales Tax Update Report for the second and third quarter 2007.

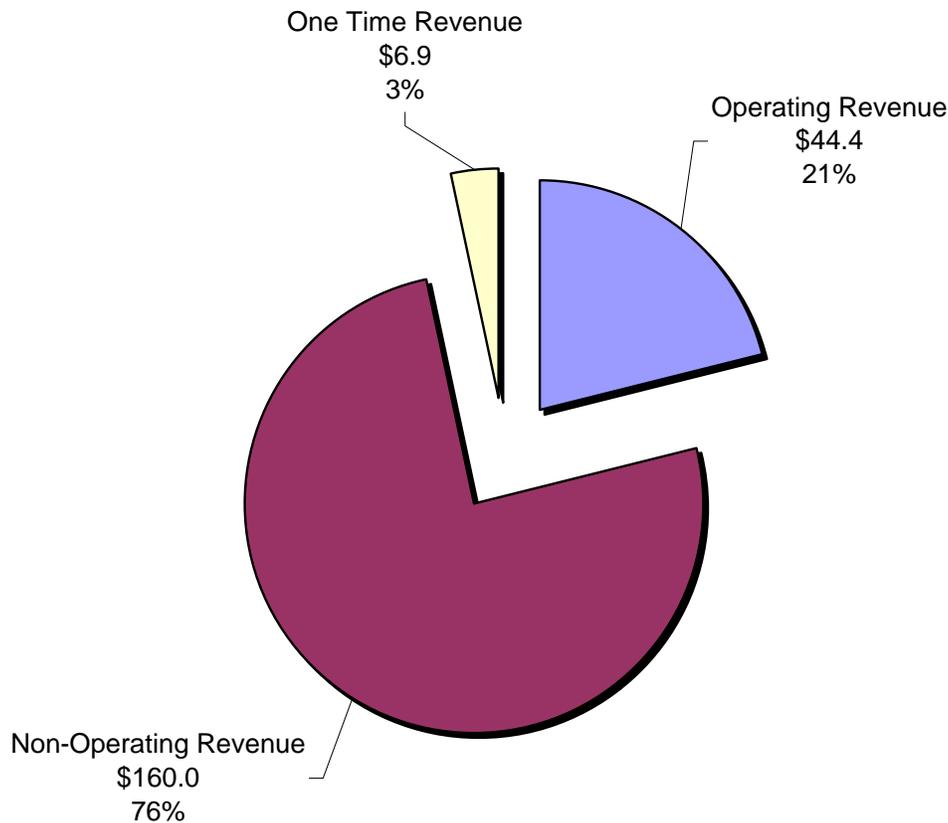
### Key Revenue Analysis

METRO separates operating revenue into three general categories: operating revenue, non-operating revenue, and one time revenue.

- **Operating revenue** includes passenger fares, special transit fares (contracts for University of California Santa Cruz, Cabrillo, and special shuttle services, and the employer pass program), paratransit fares, and fares and payments related to the Highway 17 service;
- **Non-operating revenue** includes the half-cent local transit sales tax, State Transportation Development Act (TDA) funds, Federal Transit Administration (FTA) Section 5307 funds, advertising income, rent income, interest income, commissions, FTA Section 5311 rural operating assistance, and transfers from capital;
- **One time revenue** includes a one time advance of FTA Section 5307 funds; carryover funds from the previous year, transfers from reserves, and transfers from the insurance reserve.

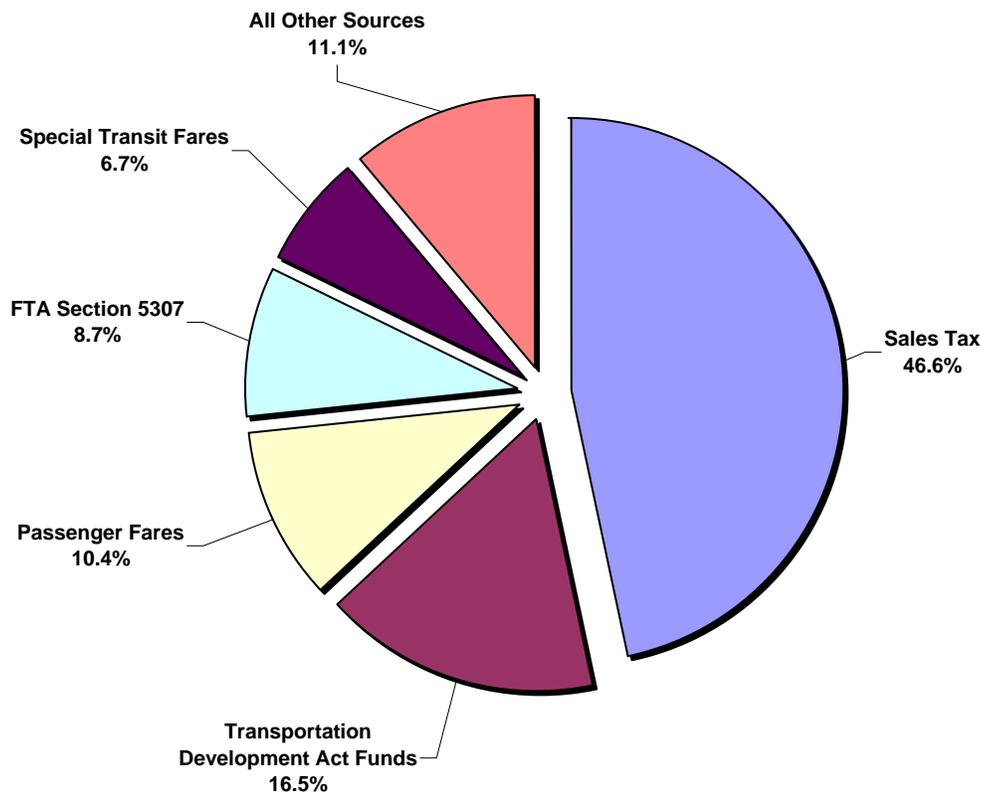
Figure 6-1 provides an overview of the budgeted operating revenues over the FY 2003 to FY 2008 period. METRO’s budgeted operating revenues grew from \$24.5 million in FY 2003 to \$29.1 million in FY 2008, which reflects an average annual growth rate of 3.4 percent per year. As shown in Figure 6-1, non-operating revenue represents the primary operating revenue source for the agency, accounting for 76 percent of total revenues over this period.

Figure 6-1: Operating Revenue Categories FY 2003 through 2008 (in millions)



A review of historic budgets revealed that four key funding sources account for approximately 82 percent of METRO’s total operating revenue. As shown in Figure 6-2, over the last five years, the key revenue sources are the half-cent transit sales tax (46.6 percent), State Transportation Development Act (TDA) funds (16.5 percent), passenger fares (10.4 percent) and FTA Section 5307 funds (8.7 percent).

Figure 6-2: Operating Revenue Sources FY 2003 through 2008 (in millions)



Source: Santa Cruz Metropolitan Transit District Adopted Budgets FY 2003 through FY 2008.

A trend analysis of historic data was the starting point for development of annual growth rate projections for the FY 2009 to 2012 period. The two data sets used for the key revenue source trend analysis were METRO's FY 2003 to 2008 adopted budget estimates and the agency's annual year end receipts for each source over this same period.

### METRO's Adopted Budget Data

Table 6-1 and Figure 6-3 summarize the budget estimates for the four key operating revenue sources over the FY 2003 to FY 2008 period. As shown in the table, the agency's budgeted revenues for these four sources combined grew from \$27.9 million to \$30.7 million over the 2003 to 2008 period. Over the five-year period, these sources grew at a compound annual growth rate of 1.9 percent, with the growth rate for 2007 to 2008 being slightly lower at 1 percent.

The annual budgeted revenue levels for each of the four key sources between 2003 and 2008 reflect a similar reduction in the annual growth in revenue over 2007 to 2008:

- Sales tax increased from \$15.8 million to \$17.6 million over the five year period which represents a 2.3 percent compound annual growth rate with a 1.8 percent increase over the last year;
- TDA funds increased from \$5.4 million in 2003 to \$6.4 million in 2008 with a five year compound annual growth rate of 3.4 percent and a 1.8 percent growth rate from 2007 to 2008;
- Passenger fares decreased over the last five year from \$3.9 million to \$3.5 million which reflects a -2.2 percent compound annual rate with a -5.5 percent decrease budgeted between 2007 and 2008; and

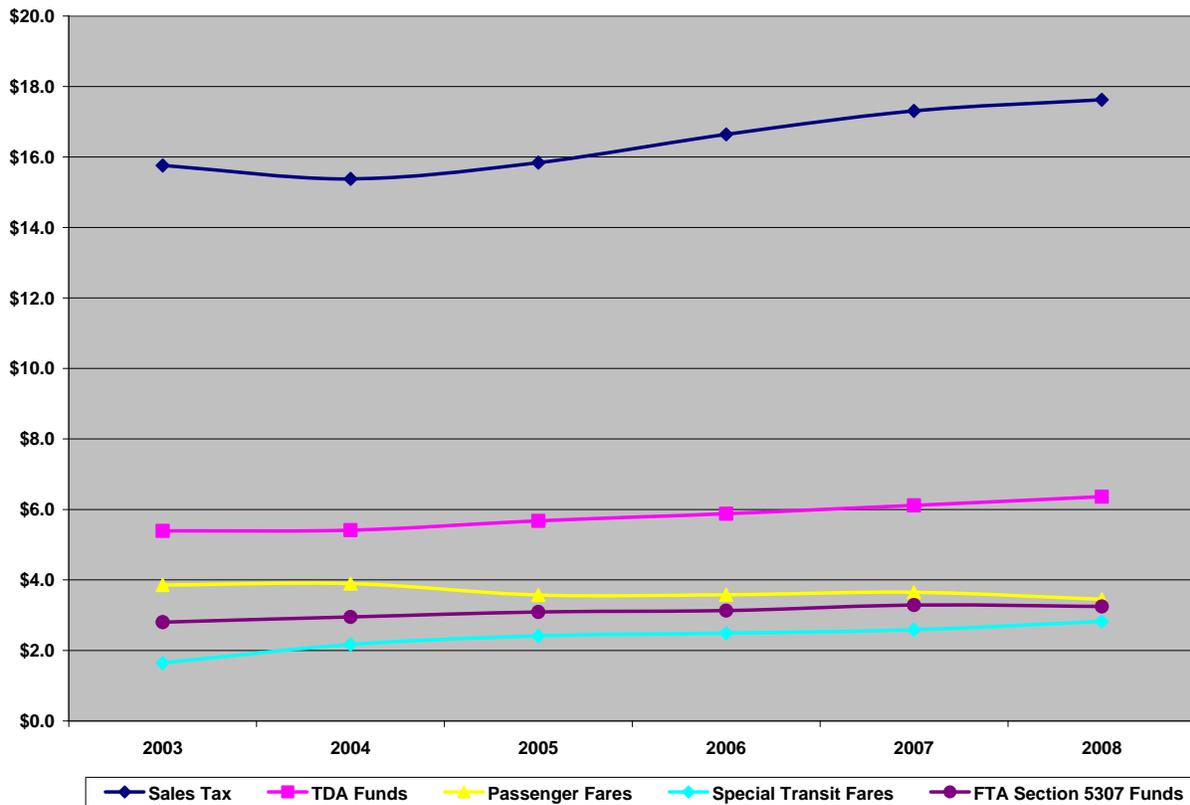
- FTA Section 5307 funds increased from \$2.8 million to \$3.2 million with a compound annual growth rate of 3 percent over the period but a -1.2 percent decrease budgeted for FY 2008.

Table 6-1: Key Revenue Sources Annual Adopted Budget Levels FY 2003-2008 (in millions)

	2003	2004	2005	2006	2007	2008	Annual Growth Rate		
							5 year	3 year	1 year
Sales Tax	\$15.8	\$15.4	\$15.8	\$16.6	\$17.3	\$17.6	2.3%	3.6%	1.8%
TDA Funds	\$5.4	\$5.4	\$5.7	\$5.9	\$6.1	\$6.4	3.4%	3.9%	1.8%
Passenger Fares	\$3.9	\$3.9	\$3.6	\$3.6	\$3.7	\$3.5	-2.2%	-1.2%	-5.5%
FTA Section 5307 Funds	\$2.8	\$3.0	\$3.1	\$3.1	\$3.3	\$3.2	3.0%	1.6%	-1.2%
<b>Key Revenue Total</b>	<b>\$27.9</b>	<b>\$27.7</b>	<b>\$28.2</b>	<b>\$29.2</b>	<b>\$30.4</b>	<b>\$30.7</b>	<b>1.9%</b>	<b>3.5%</b>	<b>1.0%</b>

Note: Although not shown in Table 6-1, historic budget data was provided from 1998 to 2008. The ten year average annual growth rates for the key revenue sources are as follows: sales tax: 3.3 percent; TDA funds: 3.3 percent; passenger revenue: 1.8 percent; and Section 5307 funds: 20.7 percent.

Figure 6-3: METRO's Key Revenue Sources FY 2003-2008 (in millions)



## METRO's Year End Actual Revenue

Table 6-2 summarizes the actual level of revenue METRO received from the four key operating sources over the FY 2003 to FY 2007 period. Please note that the 2008 year end figure is an estimate provided in the draft FY 2009 and 2010 Capital Operating and Revenue budget presented to the METRO Board of Directors in May 2008.

As shown in the table, total revenue received from the key funding sources grew from \$24.6 million to \$30.7 million over the 2003 to 2008 period. The average annual growth rate over the five year period was 4.4 percent. However, the projected growth rate for 2007 to 2008 is 1 percent. The annual revenue levels actually received from the four key revenue sources between 2003 and 2007 and projected for 2008 reflect a similar slower annual growth in 2007 to 2008:

- Sales tax increased from \$15.2 million to \$17.6 million with a 3.0 percent compound annual growth rate over the five year period but a -0.2 percent decrease projected between 2007 and 2008;
- TDA funds increased from \$5.1 million to \$6.4 million with a five year compound annual growth rate of 4.4 percent and a 3.2 percent increase over the last year;
- Passenger fares increased from \$3.1 million to \$3.5 million which represents a 2.5 percent compound annual increase over the five year period and a 1.3 percent increase for the last year; and
- FTA Section 5307 funds increased from \$1.2 million to \$3.2 million which represents a 20.7 percent compound annual growth rate over the last five years, mainly attributable to the 2004 initial year of SAFETEA-LU. Over the most recent three years the rate was 2.2 percent and over the last year it decreased to 0.7 percent.

Table 6-2: Key Revenue Sources Year End Actuals FY 2003-2008 (in millions)

	2003	2004	2005	2006	2007	2008	Annual Growth Rate		
							5 year	3 year	1 year
Sales Tax	\$15.2	\$15.2	\$15.7	\$16.7	\$17.7	\$17.6	3.0%	4.0%	-0.2%
TDA Funds	\$5.1	\$5.3	\$5.4	\$5.7	\$6.2	\$6.4	4.4%	5.5%	3.2%
Passenger Fares	\$3.1	\$3.8	\$3.5	\$3.0	\$3.4	\$3.5	2.5%	-0.8%	1.3%
FTA Section 5307 Funds	\$1.2	\$2.8	\$3.0	\$3.0	\$3.1	\$3.2	20.7%	2.2%	0.7%
<b>Key Revenue Total</b>	<b>\$24.6</b>	<b>\$27.1</b>	<b>\$27.6</b>	<b>\$28.4</b>	<b>\$30.4</b>	<b>\$30.7</b>	<b>4.4%</b>	<b>4.1%</b>	<b>1.0%</b>

## Recent Regional and Statewide Sales Tax Trends

The City of Santa Cruz produces a quarterly Sales Tax Report that summarizes city, county and state sales tax revenue trends compared to the prior year. At the time of this analysis, reports for the second and third quarters of 2007 were available for review. According to the City's reports, over this time period sales tax revenue for the county was relatively flat compared to the same period in 2006. While fourth quarter 2007 and initial projections for 2008 were not available, the third quarter report indicated that statewide, sales tax revenue is projected to decrease through early 2008 and there is uncertainty as to when sales tax revenue on the state level will increase.

The reduction in sales tax revenue at the state level is expected to impact on the level of TDA funds that METRO and other transit agencies are projected to receive. As documented in the Draft FY 2009 and 2010 Operating and Capital Budget, the Santa Cruz County Regional Transportation Commission has informed METRO that its TDA funding is projected to decrease 5.8 percent compared to last year.

## METRO STAFF BASELINE BUDGET PROJECTIONS

Over the course of developing the Short Range Transit Plan, METRO staff prepared two budget projection reports. The results from these reports provided baseline revenue levels to compare to the Short Range Plan projections.

- **Baseline 1: November 2007 Framework Plan for METRO's Capital and Operating Budgets for the FY 2007 to 2012 period:** This document, developed annually, provides the Board an overview of key short term projects, operating conditions and cost and revenue projections. For the purposes of providing a basis to compare annual revenue to SRTP forecasts, the FY 2009 to 2012 revenue estimates for Baseline 1 were forecasted using the growth rates developed for the Framework Plan and projected from the estimated FY 08 year totals from the May 9, 2008 Board Packet.
- **Baseline 2: May 2008 Draft FY 2009 and 2010 Operating and Capital Budget:** The draft budget document (as revised) provides revenue estimates for 2009 and 2010 only. For the purposes of this analysis, Baseline 2 assumed the Draft Budget's 2009 and 2010 estimates and used the annual growth rates from the Framework Plan for 2011 and 2012.

As shown in Table 6-3, between the November 2007 Framework Plan Report to the Board and the May 2008 Draft 2009 and 2010 Budget, the agency's forecasts for FY 2009 and 2010 sales tax and State Transportation Development Account (TDA) funds have decreased significantly due to the current economic conditions.

- Local sales tax revenues for FY 2009 are projected to be only 0.3 percent higher than in FY 08, compared to a 3.0 percent increase reported last November.
- As stated earlier, TDA funds for FY 2009 are projected to decrease 5.8 percent based on information from the Santa Cruz County Regional Transportation Commission, compared to a projected 4 percent increase reported last November.

Both sources are projected to return to growth rates similar to historic levels in FY 2010.

Table 6-3: Comparison of Baseline Projections

	2008	2009	2010	2011	2012
<b>Sales Tax</b>					
Baseline 1	\$17.21	\$17.64	\$18.08	\$18.53	\$18.99
Baseline 2	\$17.21	\$17.26	\$17.78	\$18.32	\$18.87
<b>TDA Funds</b>					
Baseline 1	\$6.31	\$6.50	\$6.70	\$6.90	\$7.11
Baseline 2	\$6.31	\$5.98	\$6.16	\$6.34	\$6.53
<b>Passenger Fares</b>					
Baseline 1	\$3.45	\$3.52	\$3.59	\$3.66	\$3.73
Baseline 2	\$3.45	\$3.52	\$3.59	\$3.66	\$3.73
<b>FTA Section 5307 Funds</b>					
Baseline 1	\$3.22	\$3.29	\$3.35	\$3.42	\$3.49
Baseline 2	\$3.22	\$3.50	\$3.64	\$3.72	\$3.79
<b>Key Revenue Sources Total</b>					
Baseline 1	<b>\$30.19</b>	<b>\$30.95</b>	<b>\$31.72</b>	<b>\$32.51</b>	<b>\$33.32</b>
Baseline 2	<b>\$30.19</b>	<b>\$30.26</b>	<b>\$31.17</b>	<b>\$32.04</b>	<b>\$32.92</b>

## RECOMMENDED SRTP BUDGET PROJECTION

Based on the above analyses a recommended budget projection was developed and shown in Table 6-4. This projection assumes the following:

- The updated FY 2008 Final Budget (as of May 9, 2008) as the base year.
- Annual operating revenues will experience no and/or low rates of growth over FY 2009 and FY 2010, and will return to rates closer to their pre-2008 actual growth levels in FY 2011 and 2012.

Table 6-4: Recommended SRTP Annual Projection Growth Rate Assumptions

	2009	2010	2011	2012
<b>Sales Tax</b>	0.5%	1.0%	3.0%	3.0%
<b>TDA Funds</b>	-5.3%	1.0%	3.0%	3.0%
<b>Passenger Fares</b>	2.0%	2.0%	2.0%	2.0%
<b>Section 5307 Funds</b>	1.0%	2.0%	2.0%	2.0%

Based on the review of historic data and the current economic conditions, a more conservative approach to growth rates for the sales tax, TDA, and Section 5307 funds was considered to be appropriate for FY 2009 and FY 2010 with a return to SCMTD's more traditional growth rates in FY 2011 and FY 2012. With regard to passenger revenues, a higher projected growth rate, 2 percent, than recent actual trends is supportable given the increased costs for gas combined with potential ridership growth resulting from anticipated service improvements associated with the Plan.

Table 6-5 provides a comparison of the annual growth rate projections assumed in the alternative forecasts, while Table 6-6 summarizes the annual revenue levels under each alternative. Of key importance is the comparison between the recommended growth rates and Baseline 2 (May 2008 Draft FY 2009 and FY 2010 Budget).

Table 6-5: Comparison of Baseline and Alternative Options Growth Rate Assumptions

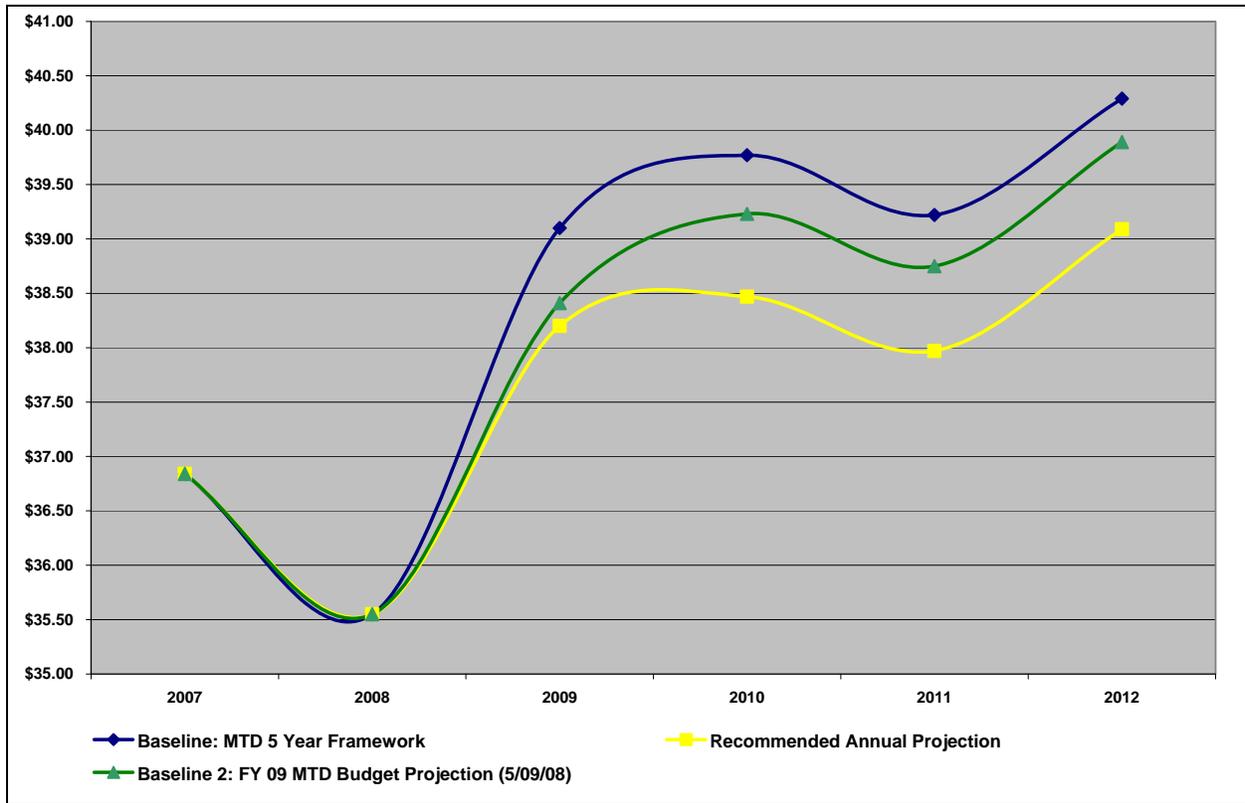
	2009	2010	2011	2012
<b>Sales Tax</b>				
Baseline: MTD 5 Year Framework	3.0%	3.0%	3.0%	3.0%
Recommended Annual Projection	0.5%	1.0%	3.0%	3.0%
Baseline 2: FY 09 MTD Budget Projection (05/09/08)	0.3%	3.0%	3.0%	3.0%
<b>TDA Funds</b>				
Baseline: MTD 5 Year Framework	3.0%	3.0%	3.0%	3.0%
Recommended Annual Projection	-5.3%	1.0%	3.0%	3.0%
Baseline 2: FY 09 MTD Budget Projection (05/09/08)	-5.3%	3.0%	3.0%	3.0%
<b>Passenger Fares</b>				
Baseline: MTD 5 Year Framework	2.0%	2.0%	2.0%	2.0%
Recommended Annual Projection	2.0%	2.0%	2.0%	2.0%
Baseline 2: FY 09 MTD Budget Projection (05/09/08)	2.0%	2.0%	2.0%	2.0%
<b>Section 5307 Funds</b>				
Baseline: MTD 5 Year Framework	4.0%	4.0%	4.0%	4.0%
Recommended Annual Projection	1.0%	2.0%	2.0%	2.0%
Baseline 2: FY 09 MTD Budget Projection (05/09/08)	8.5%	4.2%	4.0%	4.0%

Table 6-6: Comparison of the Projected Total Revenue from METRO's Key Sources

	2009	2010	2011	2012	Total
<b>Sales Tax</b>					
Baseline: MTD 5 Year Framework	\$17.64	\$18.08	\$18.53	\$18.99	\$73.24
Recommended Annual Projection	\$17.29	\$17.47	\$17.99	\$18.53	\$71.28
Baseline 2: FY 09 MTD Budget Projection (5/09/08)	\$17.26	\$17.78	\$18.32	\$18.87	\$72.23
<b>TDA Funds</b>					
Baseline: MTD 5 Year Framework	\$6.50	\$6.70	\$6.90	\$7.11	\$27.21
Recommended Annual Projection	\$5.98	\$6.04	\$6.22	\$6.41	\$24.64
Baseline 2: FY 09 MTD Budget Projection (5/09/08)	\$5.98	\$6.16	\$6.34	\$6.53	\$25.01
<b>Passenger Fares</b>					
Baseline: MTD 5 Year Framework	\$3.52	\$3.59	\$3.66	\$3.73	\$14.50
Recommended Annual Projection	\$3.52	\$3.59	\$3.66	\$3.73	\$14.50
Baseline 2: FY 09 MTD Budget Projection (5/09/08)	\$3.52	\$3.59	\$3.66	\$3.73	\$14.50
<b>Section 5307 Funds</b>					
Baseline: MTD 5 Year Framework	\$3.29	\$3.35	\$3.42	\$3.49	\$13.55
Recommended Annual Projection	\$3.26	\$3.32	\$3.39	\$3.46	\$13.42
Baseline 2: FY 09 MTD Budget Projection (5/09/08)	\$3.50	\$3.64	\$3.72	\$3.79	\$14.65
<b>Key Revenue Source Total</b>					
Baseline: MTD 5 Year Framework	\$30.95	\$31.72	\$32.51	\$33.32	\$128.50
Recommended Annual Projection	\$30.05	\$30.42	\$31.26	\$32.13	\$123.85
Baseline 2: FY 09 MTD Budget Projection (5/09/08)	\$30.26	\$31.17	\$32.04	\$32.92	\$126.39

Figure 6-4 and Table 6-7 provide a comparison of the total annual operating revenues projected based on the growth rates assumed in the alternative scenarios. As shown in the figure and table, the Recommended Annual Projection Option results in lower levels of total revenue over the FY 2009 to FY 2012 compared to METRO's FY 2009 and 2010 Budget report. This is due to a lower growth rate for FTA Section 5307 funds in 2009 and more conservative assumptions for sales and TDA funds to rebound in FY 2010. It should be noted that all scenarios assume a carryover of operating revenues in 2009 and 2010, as reflected in METRO's FY 2009 and 2010 Budget report, with no carryover reflected in 2011 and 2012.

Figure 6-4: Comparison of Projected Total Annual Operating Revenues (in Millions) FY's 2009 - 2012



Note: FY 2008 reflects a carryover of \$2.06 million to FY 2009. METRO considers the carryover from FY 2008 as a negative. FY 2010 includes approximately \$1.9 million in transfers to the operating budget based on expense projections in the Draft 2009 and 2010 budget. At this time costs have not been developed for 2011 and 2012. As a result no carryover or transfer funds are included in 2011 and 2012 projections.

Table 6-7: Comparison of Projected Total Annual Operating Revenues (in Millions)

	2007	2008	2009	2010	2011	2012
Baseline: MTD 5 Year Framework	\$36.84	\$35.55	\$39.10	\$39.77	\$39.22	\$40.29
Recommended Annual Projection	\$36.84	\$35.55	\$38.20	\$38.47	\$37.97	\$39.09
Baseline 2: FY 09 MTD Budget Projection (5/09/08)	\$36.84	\$35.55	\$38.41	\$39.23	\$38.75	\$39.89

Note: FY 2008 reflects a carryover of \$2.06 million to FY 2009. METRO considers the carryover from FY 2008 as a negative. FY 2010 includes approximately \$1.9 million in transfers to the operating budget based on expense projections in the Draft 2009 and 2010 budget. At this time costs have not been developed for 2011 and 2012. As a result no carryover or transfer funds are included in 2011 and 2012 projections.

## CAPITAL NEEDS

The primary components of a capital needs are vehicles, facilities, and transit amenities/technology.

### VEHICLES

METRO has a complex fleet of fixed-route vehicles that includes 40 and 35 foot vehicles, diesel and CNG engines, high and low floor entry as well as the 41 foot suburban vehicles for longer distance travel. The average age of the fixed route vehicles is approximately 10 years, which includes 22 of the 113 vehicles that are 19 or 20 years old. Newer low floor CNG models have been added beginning in 2002. From a paratransit vehicle perspective, 24 of those 34 vehicles have been acquired since 2003.

The service plan recommendation for trunk and feeder service could potentially impact vehicle acquisition strategies in the future. Although METRO does not plan to operate longer vehicles, such as articulated buses, within the planning horizon of this plan, reallocation and purchase of smaller vehicles to more accurately match demand should be considered. This would include allocating 40 foot vehicles to any trunk line or regional service and reserving existing 35 foot or future smaller vehicles that may be acquired for local services.

Vehicle needs arise from the replacement of existing vehicles and the demand for vehicles based on added service. The replacement schedule is based on vehicles that exceed the FTA 12 year useful life span guideline or those diesel vehicles that will need to be replaced by 2012 to meet state law. Including a recent procurement of 13 CNG vehicles, METRO currently has 63 non-diesel vehicles or a peak hour roll out of 55 vehicles for fixed route service. In order to meet the current peak hour pull out of 83 buses, METRO would need to acquire an additional 28 non-diesel vehicles over the next four years.

In addition, the proposed service plan includes recommendations that would likely require METRO to purchase new vehicles. The vehicle requirements needed to decouple the existing interlined service and improve reliability, as noted in the prior chapter, (by universally adding hours) is difficult to estimate. Since the existing interlining scheduling is designed to maximize resources, it is estimated that at least two additional vehicles will be needed.

The additional peak hour trip on the Highway 17 service recommended in the service plan would require one vehicle to operate. The Watsonville to Santa Cruz trunk line service will utilize the existing 40 foot buses used on the existing intercity routes but will require an additional two vehicles to meet the peak hour demands. In addition, two smaller vehicles will be needed to serve the new Capitola local routes connecting the trunk line service to the Capitola Mall. The Santa Cruz trunk line service could operate with the existing fleet and would not require any new vehicles to be purchased. In fact, the consolidation of routes would free up one vehicle for use elsewhere in the network. Table 6-8 below shows the schedule of new bus purchases and their estimated costs.

Table 6-8: Estimated Vehicle Needs

	Vehicle Needs							
	FY 08-09		FY 09-10		FY 10-11		FY 11-12	
Vehicle Size:	40'	35'/30'	40'	35'/30'	40'	35'/30'	40'	35'/30'
Vehicle Replacement	3	-	8	-	8	-	8	-
Restore Reliability of Existing Service	2	-	-	-	-	-	-	-
Highway 17 and Weekend Service	1	-	-	-	-	-	-	-
Santa Cruz-Watsonville Trunk	2	2	-	-	-	-	-	-
Santa Cruz-UCSC Trunk	-	-	-	-	-	-	(-1)	-
<b>Total</b>	<b>8</b>	<b>2</b>	<b>8</b>	<b>-</b>	<b>8</b>	<b>-</b>	<b>7</b>	<b>-</b>
<b>Cost Per CNG Vehicle</b>	\$380,000	\$370,000	\$393,300	\$382,950	\$407,066	396,353	\$421,313	\$410,226
<b>Total Cost</b>	\$3,040,000	\$740,000	\$3,146,400	\$0	\$3,256,528	\$0	\$2,949,191	\$0
	<b>\$3,780,000</b>		<b>\$3,146,400</b>		<b>\$3,256,528</b>		<b>\$2,949,191</b>	

Paracruz will also need replacement vehicles through FY 11-12. Table 6-9 shows these anticipated replacements. In addition to Paracruz and those vehicles listed in Table 6-8, three Goshen local buses will need to be purchased in 2010 at a total cost of \$700,000.

Table 6-9: Paracruz Vehicle Replacement Schedule

	Vehicle Needs			
	FY 08-09	FY 09-10	FY 10-11	FY 11-12
Paracruz Van Replacements	7	3	5	3
<b>Cost Per Paracruz Van</b>	\$80,000	\$80,000	\$80,000	\$80,000
<b>Total Cost</b>	<b>\$560,000</b>	<b>\$240,000</b>	<b>\$400,000</b>	<b>\$240,000</b>

## FACILITIES

Four transit centers are currently used by METRO as hub or transfer locations for their fixed routes services. The two primary centers where nearly all routes converge are the Santa Cruz Transit Center or METRO Center located in Downtown Santa Cruz and the Watsonville Transit Center located in Downtown Watsonville. Both of these facilities contain a large number of bus bays to allow layover and transferring activities to occur. They also include a high level of customer amenities including food vendors, customer service agents and seating.

The secondary transit centers are located in Scotts Valley and Capitola. The Cavallaro Transit Center is located on Kings Village Road, just north of Mt. Hermon Road in Scotts Valley. The Capitola Transit Center is located at the Capitola Mall on 41st Street. Both of these facilities have fewer customer amenities but

provide key transfer points for METRO's fixed routes services. The implementation of the trunk and feeder service may result in other connection points that could benefit from additional facility improvements, such as:

- Green Valley Road and Main Street (Watsonville)
- Cabrillo College (Aptos)
- Soquel and 41<sup>st</sup> (Santa Cruz)
- Water and Ocean Street (Santa Cruz)
- Felton Faire (Felton)

The District is also in the process of constructing the new MetroBase Transit facility on River Street and Golf Course Drive. The new facility will be the central location for operations and maintenance of METRO's bus fleet. The facility will contain the following components:

- Liquefied Compression Natural Gas (LCNG) fueling station
- Bus washing structure
- A second story addition to the current building
- Reconfigured parking and circulation

From an operational perspective the MetroBase plan would require modifications if larger capacity vehicles were added to the fleet.

Two significant capital expenditures are scheduled for FY 2008-09 and FY 2011-12 which include 27 million for the new Operations Building and Parking and 10 million for the Paracruz Operations Building, respectively. Bus stop improvements are allocated \$400,000 in FY 2008-09 and \$500,000 in FY 2010-11.

## **TRANSIT AMENITIES AND TECHNOLOGY**

Improved passenger amenities, including widely distributed bus shelters and improved route signage, a system map, improved web site and improved timetables are an important component of the marketing and attention to customers that are important tools in the efforts to provide viable mobility options which are easy to use and understand by existing and potential new transit riders. . These transit amenities improve the experience of using transit for patrons and have proven to be valuable throughout the industry as components of enhancing communication, information and comfort for passengers. At this time, however, given the current financial uncertainties and the forecast for potentially reduced resources, it would appear that many of the amenities may be deferred. We believe, however, that investing in enhanced communication and technology would be a positive benefit for METRO, its customers and the communities it serves.

As part of the monitoring and evaluation process, there have been recommendations to expand technology to include more use of automatic passenger counters and automatic vehicle locators. These systems would enable the ability to quickly and accurately collect data that would be used in the performance monitoring process and reduce data collection resources. This is also an important investment in the future of METRO.

As previously discussed the potential for higher demand on the trunk corridors could then lead to the use of higher capacity vehicles that could operate in a Bus Rapid Transit mode. BRT applications typically have included a number of technology improvements such as:

- Traffic signal preference or priority
- Real time bus arrival information
- Off board automated fare media
- Docking and maneuvering software
- Etc.

If METRO decides to pursue the BRT feasibility, sufficient technology infrastructure should be examined as part of the capital cost estimation. FY 2007-08 allocates \$5 million for an AVL system and another \$500,000 for a telecommunications system. Improvements to the farebox in FY 2008-09 are allocated \$1 million dollars.

## CHAPTER 7: ADDENDUM

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In July of this year the Board was presented with a draft of the service portion of the Short Range Transit Plan (SRTP). At that meeting concern was raised by members of the Board regarding the proposal to move towards a “trunk and feeder” concept within the five-year planning horizon of the Short Range Transit Program. At that meeting, the concept was presented for discussion.

The staff the looked at specific ways that the concept could be implemented, laying out a revised routing structure in the corridor from Santa Cruz to Watsonville. Staff developed a routing scenario that would restructure the service to a trunk and feeder concept and then compared this service levels and coverage that exists today.

In the scenario developed by the staff, the service would require 89,475 hours of service, to replace the existing 76,408 hours now being provided. This is an increase of 17%, which in 2008 dollars is approximately \$850,000.

Implementation of the trunk and feeder service would also require a review of the current METRO fare structure to understand the impact of potentially increasing the number of transfers in the system. One potential recommendation for the fare structure would be the implementation of a day pass on the system.

In addition to the increased operating costs, there are a range of capital items which METRO staff recognizes would be necessary for the successful implementation of the trunk and feeder service. These capital investments would be in the area of customer information and technology, and in vehicle and station infrastructure. Each of these items are discussed below.

### FARE STRUCTURE AND FAREBOX INFRASTRUCTURE

One of the impacts of moving to a trunk and feeder concept is that the number of transfers may increase as people may be required to transfer to complete a trip. Today, METRO charges a fare each time a passenger boards a bus, unless a Day Pass is purchased, or the rider has a Monthly Pass. Currently the Day Pass is priced at 3 times the base fare. In this instance if your trip is served by 1 bus in each direction, it is cheaper for a person to simply pay for individual rides. In the case of a trunk and feeder system, with more potential transfers, it is recommended that METRO consider reviewing the revenue impact of pricing the day pass at 2 times the base fare to avoid an indirect fare increase to the public. While moving to a trunk and feeder concept would probably increase ridership, METRO should quantify the lost revenue from moving to a revised fare structure. Another technique related to fares and enhanced boarding at stops. METRO should consider the use of SMART CARD technology to allow fast and easy boarding on the vehicles. METRO staff has requested capital funding for this system with FTA.

## AVL AND PASSENGER INFORMATION SYSTEM

Another important component to making a trunk and feeder operate efficiently from a passenger perspective is to ensure that all connections with the trunk are as seamless as can be. For this to occur, schedule coordination becomes critical. With existing traffic conditions in the Santa Cruz to Watsonville corridor, METRO is aware that there are already delays to the service, which was one factor which led to the discussion of a trunk and feeder system to allow for services in the communities to be less impacted by congestion and delay on the highway 1 service. The implementation of an Automated Vehicle Location (AVL) system is necessary to put the dispatcher in the role of an air traffic controller to hold various buses to make these connections. Such a system is recommended even without a move to the trunk and feeder service, as current on time performance is one of the critical areas of customer concern which needs improvement in the METRO service. Without real time information available METRO dispatch and management are at a disadvantage in providing information to customers. With the implementation of a trunk and feeder service, real time information becomes even more critical to passenger convenience, as they wait to make service connections. An AVL system for METRO would cost approximately \$5.0 million and would provide METRO many benefits, well beyond what is discussed above. In addition, it is recommended that real time information signposts be installed at each of the feeder connections to the trunk route so that passengers would know when the next bus was going to arrive. Knowing that a bus is arriving in 3 minutes when you can't see it is very comforting and it takes away from rider concerns. A minimalist system to accomplish just the signage without a full AVL system might be purchased for approximately \$200,000, based upon conversations with a vendor at the recent APTA Expo in San Diego.

## CONTINGENCY FUNDS FOR OPERATIONS

In order for such a major change to occur, METRO should have an amount of contingency funds available to be able to deal with any problems that would arise after implementation. Should this concept prove to be successful, and ridership grows, causing various routes to be overcrowded, METRO would have to have reserve capacity available to supplement service. A fund of 5% is recommended for consideration.

## VEHICLES AND STATION INFRASTRUCTURE

In some areas where transit agencies have moved to this concept, transit agencies have “branded” the buses with a different paint scheme to create attention for the new service. This was done for example in San Jose for the Rapid bus line along El Camino. In many cases, separate fleets of buses were ordered with amenities that are markedly different than the regular fleet to clearly differentiate that this is a different experience. In these instances the services provided have been very successful and have exceeded initial projections. Additionally, the major transfer points along the routes should be considered for capital investments and upgrades to allow for enhanced customer amenities in place of the typical METRO bench or shelter, as these would be heavily used bus stops and would need to accommodate at least 2 buses at a time to allow for easy transfers.

## TRAFFIC CONGESTION/HOV LANE

METRO buses operate on the local streets and highways. As traffic congestion has continued to increase in the county, it takes METRO vehicles longer to complete their routes. This “delay factor” presents METRO with only two options. First we can add additional buses to make up for the delays. This would be an additional cost to METRO for which there is currently no funding. The reality is that these traffic congestion costs result in service cuts, since it takes the same bus longer to navigate its route, resulting in less trips. For the trunk and feeder concept to operate at a higher level of service, and not be slowed down by traffic, it is necessary that the High Occupancy Lane Project for Highway 1 be implemented. The impact of this improvement is that traffic on local streets would also flow better with the added capacity on the highway.

## ECONOMY

At the time that the initial study was being performed, economic conditions were very different. METRO staff was projecting that there would be an additional amount of \$1 million of new service that could be added to the system in each of the next three years. These increased revenues would have provided a needed cushion that would have potentially supported a revised system of service delivery. When changing to a different form of service delivery, the system has to have a financial reserve to be able to deal with any service issues that might arise – both successes and failures. Quick response can mean the difference between success and failure of a change. Unfortunately, the economy in the nation has taken a severe turn and as a result, sales tax projections are actually below what was collected in the prior year. The likelihood of a quick recovery does not appear to be good at this time, and most economists are predicting a slow recovery. As a result of this, it is not anticipated METRO will be in a financial position to move to a trunk and feeder concept with the five year horizon of a Short Range Transit Plan.

It is the recommendation of staff that following actions be taken:

- Add to the SRTP this discussion and revise the discussion on the trunk and feeder concept to reflect that it will not be pursued in the planning horizon of this plan.
- Adopt the revised SRTP with no revision being made to the service delivery model in use by METRO
- Revisit the service delivery issue in future updates to the SRTP

## APPENDIX A: HISTORY OF METRO

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The Santa Cruz Metropolitan Transit District was formed in 1968 following the approval of a countywide vote to establish such a district with taxing authority. The initial boundaries of the transit served were developed around the communities of Santa Cruz, Capitola, and Live Oak. The boundaries were later expanded to include the rest of the populated area in the County.

The first operations were contracted to the Santa Cruz Transit Co. in September of 1970. Service was composed of five local Santa Cruz lines and one suburban route to Capitola. The district then took over operations in 1971 with the purchase of six new General Motors coaches. At this time service was provided to the old Mission Street, County Hospital, DeLaveaga Park, and Capitola. The original five lines were soon expanded to include service to the University, Aptos via Soquel and the Natural Bridges State Park. Continued service expansion, including weekend and night service in selected areas, occurred during the early part of the 1970's to meet the escalating demands from the University and areas east of Aptos including La Selva Beach.

Service to Watsonville was taken over by METRO from the privately operated Watsonville Bus Lines in February of 1974. Initial service included the extension of the Cabrillo College-Aptos route and the establishments of two new local services, Airport and East Lake. That same year, a new line was opened to serve Scotts Valley and the San Lorenzo Valley. The following year extensions to Boulder Creek and Felton were added.

Funding sources took a significant shift in June of 1979 when voters approved "Measure G" which changed the basis of transit support in the County from property tax to a ½ cent sales tax. As a result, new buses were purchased and service expansion continued including rural service to Davenport, Bonny Doon, Branciforte Drive, Glen Canyon, and Old San Jose Road. Three summer recreational routes also starting, providing park & ride shuttle service to the Capitola and Santa Cruz beachfronts. Extensive service improvements in March of 1980 including renumbering the routes to correspond to the geographical regions they served: (1-29) Santa Cruz, (30-39) San Lorenzo Valley, (40-49) North Coast, (50-69) Mid County, and (70-79) South County.

Productivity indicators were first introduced by the District in 1981 to improve the efficiency of the routes in service. Four productivity indicators and operational standards were developed which included farebox recovery, passengers per hour, passengers per mile, and a utilization ratio. Routes were then assigned to one of three classifications - urban collector/express routes, urban local routes, and rural routes. Each category of route had an appropriate operational standard from which staff could identify unproductive or unwarranted service from.

Funding cuts and rising operating costs continued throughout the 1980's, forcing METRO to cut staffing, alter service, and increase bus fares. The biggest hit came in 1989 when the region was struck with the Loma Prieta earthquake, wiping out many of roads and bridges leading into the area, including the two major state highways - Highway 1 and Highway 17. The Watsonville Bus Maintenance and Operating Facility was also lost in the earthquake and the Santa Cruz Operating Facility was severely damaged. The Highway 17 Express service was soon implemented as an emergency bus service jointly operated by the District and Santa Clara Transit.

The earthquake's economic impacts on the retail market resulted in a significant reduction in the sales tax, which accounted for 50% of the District's operation budget. In March of 1990, the District was forced to raise base fares to \$1.00, cut expenses, and lay off managerial, administrative, and operations personnel.

Service was then reduced by 28% in December of 1990 and a systemwide redesign was implemented that affected virtually every route in the system.

In 2005, METRO experienced a driver's strike that resulted in service not operating for the month of October. Ridership following this event significantly dropped and has been in recovery ever since. The compromise reached following the strike outlined mandatory break times for the drivers during an eight hour work shift. To meet these new requirements, METRO was forced to tighten its scheduling practices and minimize any lost time in the existing schedules.

# APPENDIX B: FLEET INVENTORY

## REVENUE VEHICLES

(data as of April 11<sup>th</sup>, 2008)

Vehicle #	Manufacturer	Veh. Type	Year	VIN	License #	Model	YTD MILES
8075	NEW FLYER	Bus	1988	XJU013217	E-200899	D35	99,775
8076	NEW FLYER	Bus	1988	1JU013218	E-200898	D35	969,651
8077	NEW FLYER	Bus	1988	3JU013219	E-431948	D35	822,396
8078	NEW FLYER	Bus	1988	XJU013220	E-484800	D35	846,984
8079	NEW FLYER	Bus	1988	1JU013221	E-484799	D35	811,947
8080	NEW FLYER	Bus	1988	3JU013222	E-484798	D35	769,293
8081	NEW FLYER	Bus	1988	5JU013223	E-484797	D35	649,086
8082	NEW FLYER	Bus	1988	7JU013224	E-484796	D35	723,304
8083	NEW FLYER	Bus	1988	9JU013225	E-484795	D35	735,263
8084	NEW FLYER	Bus	1988	0JU013226	E-484794	D35	761,353
8085	NEW FLYER	Bus	1988	2JU013227	E-484793	D35	745,904
8090	NEW FLYER	Bus	1988	6JU013232	E-484789	D35	876,234
8091	NEW FLYER	Bus	1988	8JU013233	E-484788	D35	864,798
8092	NEW FLYER	Bus	1988	XJU013234	E-484787	D35	814,507
8095	NEW FLYER	Bus	1988	5JU013237	E-484784	D35	890,364
		<b>Fleet Age</b>	<b>20</b>	<b>Diesel 35'</b>	<b>Count</b>	<b>15</b>	<b>758,724</b>

8100	NEW FLYER	Bus	1989	C01KU013468	E-114011	D40	929,360
8101	NEW FLYER	Bus	1989	C03KU013469	E-114010	D40	1,005,448
8102	NEW FLYER	Bus	1989	C0XKU013470	E-114012	D40	914,037
8103	NEW FLYER	Bus	1989	C01KU013471	E-114013	D40	928,895
8105	NEW FLYER	Bus	1989	C05KU013473	E-114018	D40	932,255
8106	NEW FLYER	Bus	1989	C07KU013474	E-114016	D40	935,307
8107	NEW FLYER	Bus	1989	C09KU013475	E-114019	D40	924,098
		<b>Fleet Age</b>	<b>19</b>	<b>Diesel 40'</b>	<b>Count</b>	<b>7</b>	<b>938,486</b>

9801	NEW FLYER	Bus	1998	5FYD2SL04WU018344	E-1019702	D35LF	465,725
9802	NEW FLYER	Bus	1998	5FYD2SL06WU018345	E-1019703	D35LF	527,380
9803	NEW FLYER	Bus	1998	5FYD2SL08WU018346	E-1019704	D35LF	468,236
9804	NEW FLYER	Bus	1998	5FYD2SL0XWU018347	E-1019705	D35LF	495,374
9805	NEW FLYER	Bus	1998	5FYD2SL01WU018348	E-1019706	D35LF	470,330
9806	NEW FLYER	Bus	1998	5FYD2SL03WU018349	E-1019707	D35LF	449,139
9807	NEW FLYER	Bus	1998	5FYD2SL0XWU018350	E-1019708	D35LF	469,515
9808	NEW FLYER	Bus	1998	5FYD2SL01WU018351	E-1019709	D35LF	445,550
9809	NEW FLYER	Bus	1998	5FYD2SL03WU018352	E-1019710	D35LF	443,768
9810	NEW FLYER	Bus	1998	5FYD2SL05WU018353	E-1019711	D35LF	442,405
9811	NEW FLYER	Bus	1998	5FYD2SL07WU018354	E-1019712	D35LF	488,231
9812	NEW FLYER	Bus	1998	5FYD2SL09WU018355	E-1019713	D35LF	454,099
9813	NEW FLYER	Bus	1998	5FYD2SL00WU018356	E-1019714	D35LF	469,922

APPENDIX B: FLEET INVENTORY

Vehicle #	Manufacturer	Veh. Type	Year	VIN	License #	Model	YTD MILES
9814	NEW FLYER	Bus	1998	5FYD2SL02WU018357	E-1019715	D35LF	468,314
9815	NEW FLYER	Bus	1998	5FYD2SL04WU018358	E-1019716	D35LF	458,365
9816	NEW FLYER	Bus	1998	5FYD2SL06WU018359	E-1019717	D35LF	492,736
9817	NEW FLYER	Bus	1998	5FYD2SL02WU018360	E-1019718	D35LF	495,004
9818	NEW FLYER	Bus	1998	5FYD2SL04WU018361	E-1019719	D35LF	496,264
		<b>Fleet Age</b>	<b>10</b>	<b>Diesel 35'</b>	<b>Count</b>	<b>18</b>	<b>472,242</b>
9819	NEW FLYER	Bus	1998	5FYD2LL09WU018362	E-1011093	D40LF	491,531
9820	NEW FLYER	Bus	1998	5FYD2LL00WU018363	E-1011094	D40LF	463,583
9821	NEW FLYER	Bus	1998	5FYD2LL02WU018364	E-1011095	D40LF	427,374
9822	NEW FLYER	Bus	1998	5FYD2LL04WU018365	E-1011096	D40LF	435,821
9823	NEW FLYER	Bus	1998	5FYD2LL06WU018366	E-1011097	D40LF	419,864
9824	NEW FLYER	Bus	1998	5FYD2LL08WU018367	E-1011098	D40LF	480,025
9825	NEW FLYER	Bus	1998	5FYD2LLOXWU018368	E-1011099	D40LF	457,096
9826	NEW FLYER	Bus	1998	5FYD2LL01WU018369	E-1019700	D40LF	428,861
9827	NEW FLYER	Bus	1998	5FYD2LL08WU018370	E-1019701	D40LF	406,416
9828	NEW FLYER	Bus	1998	5FYD2LLOXWU018371	E-1019722	D40LF	447,792
9829	NEW FLYER	Bus	1998	5FYD2LL01WU018372	E-1019720	D40LF	437,271
9830	NEW FLYER	Bus	1998	5FYD2LL03WU018373	E-1019721	D40LF	434,301
		<b>Fleet Age</b>	<b>10</b>	<b>Diesel 40' LowFloor</b>	<b>Count</b>	<b>12</b>	<b>444,161</b>
9831	GILLIG, 1984	Bus	2000	15GCD081XE1080814	E-445937	40TB/96	480,679
9832	GILLIG, 1984	Bus	2000	15GCD0814E1080787	E-445941	40TB/96	497,361
9833	GILLIG, 1984	Bus	2000	15GCD0813E1080790	E-445975	40TB/96	503,818
9834	GILLIG, 1984	Bus	2000	15GCD0817E1080792	E-445977	40TB/96	490,139
9835	GILLIG, 1984	Bus	2000	15GCD081DE1080800	E-445984	40TB/96	445,948
9836	GILLIG, 1984	Bus	2000	15GCD0816E1080803	E-445987	40TB/96	439,713
9837	GILLIG, 1984	Bus	2000	15GCD081XE1080805	E-445993	40TB/96	449,897
9838	GILLIG, 1984	Bus	2000	15GCD0816E1080807	E-445991	40TB/96	450,711
9839	GILLIG, 1984	Bus	2000	15GCD0814E1080811	E-445940	40TB/96	466,293
9840	GILLIG, 1984	Bus	2000	15GCD0816E1080812	E-445939	40TB/96	459,029
		<b>Fleet Age</b>	<b>8</b>	<b>Diesel 40'</b>	<b>Count</b>	<b>10</b>	<b>468,359</b>
2201	NEW FLYER	Bus	2002	5FYC2LP092U024047	1133345	C40LF	247,059
2202	NEW FLYER	Bus	2002	5FYC2LP002U024048	1133346	C40LF	230,821
2203	NEW FLYER	Bus	2002	5FYC2LP022U024049	1133347	C40LF	205,086
2204	NEW FLYER	Bus	2002	5FYC2LP092U024050	1133348	C40LF	196,349
2205	NEW FLYER	Bus	2002	5FYC2LP002U024051	1133349	C40LF	159,111
2206	NEW FLYER	Bus	2002	5FYC2LP022U024052	1139300	C40LF	197,953
2207	NEW FLYER	Bus	2002	5FYC2LP042U024053	1139301	C40LF	205,876
2208	NEW FLYER	Bus	2002	5FYC2LP062U024054	1139302	C40LF	199,388
		<b>Fleet Age</b>	<b>6</b>	<b>CNG 40' LowFloor</b>	<b>Count</b>	<b>8</b>	<b>205,205</b>

APPENDIX B: FLEET INVENTORY

Vehicle #	Manufacturer	Veh. Type	Year	VIN	License #	Model	YTD MILES
10	CHANCE	TROL/REP	2002	1C9S2CCS62W535135	E-1139326	AH-28	8145
		<b>Fleet Age</b>	<b>6</b>	<b>CNG 32' replica</b>	<b>Count</b>	<b>1</b>	<b>8,145</b>
2210	NEW FLYER	Bus	2003	5FYD2GL082U024705	1161769	D35LFC	230,913
2211	NEW FLYER	Bus	2003	5FYD2GL0X2U024706	1156746	D35LFC	252,508
2212	NEW FLYER	Bus	2003	5FYD2GL012U024707	1156749	D35LFC	247,820
2213	NEW FLYER	Bus	2003	5FYD2GL032U024708	1161750	D35LFC	224,994
2214	NEW FLYER	Bus	2003	5FYD2GL052U024709	1161773	D35LFC	281,229
2215	NEW FLYER	Bus	2003	5FYD2GL012U024710	1161774	D35LFC	252,429
2216	NEW FLYER	Bus	2003	5FYD2GL032U024711	1161761	D35LFC	229,224
2217	NEW FLYER	Bus	2003	5FYD2GL052U024712	1161775	D35LFC	348,762
2218	NEW FLYER	Bus	2003	5FYD2GL072U024713	1161757	D35LFC	244,240
2219	NEW FLYER	Bus	2003	5FYD2GL092U024714	1161770	D35LFC	457,567
2220	NEW FLYER	Bus	2003	5FYD2GL002U024715	1161762	D35LFC	233,892
2221	NEW FLYER	Bus	2003	5FYD2GL022U024716	1161767	D35LFC	216,200
2222	NEW FLYER	Bus	2003	5FYD2GL042U024717	1161763	D35LFC	251,987
2223	NEW FLYER	Bus	2003	5FYD2GL062U024718	1161766	D35LFC	232,504
2224	NEW FLYER	Bus	2003	5FYD2GL082U024719	1161764	D35LFC	253,025
		<b>Fleet Age</b>	<b>5</b>	<b>Diesel/CNG 35' Low</b>	<b>Count</b>	<b>15</b>	<b>263,820</b>
2225	NEW FLYER	Bus	2003	5FYD2LL052U024640	1156748	D40LFC	260,155
2226	NEW FLYER	Bus	2003	5FYD2LL072U024641	1156747	D40LFC	207,078
2227	NEW FLYER	Bus	2003	5FYD2LL092U024642	1161765	D40LFC	200,070
2228	NEW FLYER	Bus	2003	5FYD2LL002U024643	1161755	D40LFC	238,433
2229	NEW FLYER	Bus	2003	5FYD2LL022U024644	1161776	D40LFC	225,822
2230	NEW FLYER	Bus	2003	5FYD2LL042U024645	1161771	D40LFC	235,486
2231	NEW FLYER	Bus	2003	5FYD2LL062U024646	1161754	D40LFC	193,228
2232	NEW FLYER	Bus	2003	5FYD2LL082U024647	1161753	D40LFC	174,414
2233	NEW FLYER	Bus	2003	5FYD2LL0X2U024648	1161768	D40LFC	200,428
2234	NEW FLYER	Bus	2003	5FYD2LL012U024649	1161772	D40LFC	168,609
2235	NEW FLYER	Bus	2003	5FYD2LL082U024650	1161779	D40LFC	125,504
2236	NEW FLYER	Bus	2003	5FYD2LL0X2U024651	1161756	D40LFC	144,689
2237	NEW FLYER	Bus	2003	5FYD2LL012U024652	1161777	D40LFC	158,896
2238	NEW FLYER	Bus	2003	5FYD2LL032U024653	1161778	D40LFC	182,513
		<b>Fleet Age</b>	<b>5</b>	<b>Diesel/CNG 40' Low</b>	<b>Count</b>	<b>14</b>	<b>193,952</b>
2301	ORION	BUS	2003	1VHAH3A2536502006	1119644	V	267,742
2302	ORION	BUS	2003	1VHAH6A2936502141	1179154	V	211,483
2303	ORION	BUS	2003	1VHAH6A2036502142	1179155	V	242,866
2304	ORION	BUS	2003	1VHAH6A2236502143	1179156	V	263,570
2305	ORION	BUS	2003	1VHAH6A2436502144	1179157	V	247,533
2306	ORION	BUS	2003	1VAHA6A2636502145	1179161	V	222,808
2307	ORION	BUS	2003	1VHAH6A2836502146	1179163	V	223,257
2308	ORION	BUS	2003	1VHAH6A2X36502147	1179162	V	190,863
2309	ORION	BUS	2003	1VHAH6A2136502148	1179164	V	224,236

Vehicle #	Manufacturer	Veh. Type	Year	VIN	License #	Model	YTD MILES
2310	ORION	BUS	2003	1VHAH6A2336502149	1179165	V	201,862
2311	ORION	BUS	2003	1VHAH6A2X36502150	1179166	V	189,381
		<b>Fleet Age</b>	<b>5</b>	<b>Diesel Suburban 41'</b>	<b>Count</b>	<b>11</b>	<b>225,964</b>
2405	FORD/GOSHEN	BUS	2003	1FDXE45S53HB85231	1172517	GCII	18,297
2406	FORD/GOSHEN	BUS	2003	1FDXE45S33HB85227	1172520	GCII	23,653
		<b>Fleet Age</b>	<b>5</b>	<b>Gas 25' Cutout</b>	<b>Count</b>	<b>2</b>	<b>20,975</b>
2601	NEW FLYER	BUS	2006	5FYC4FP076C030758	1263658	C40LF	37026
2602	NEW FLYER	BUS	2006	5FYC4FP096C030759	1263657	C40LF	27548
		<b>Fleet Age</b>	<b>2</b>	<b>CNG 40' LowFloor</b>	<b>Count</b>	<b>2</b>	<b>32,287</b>
		<b>Avg. Age</b>	<b>9</b>		<b>Total Ct.</b>	<b>115</b>	<b>411,988</b>

**All Buses:**

GenFare registering fareboxes, solid-state circuitry, probe enabled, one each

DR500 Talking Bus - Bus Stop annunciator linked with visible scrolling text bar

Twin Vision / Luminator destination curtain (external)

Motorola Maritak 2-Way Radio Set

Sportworks - front-mounted, 2-position bike racks (incrementally updating to 3-position)

Air Conditioning: 8100-8107, 9831-9840, 2201 - 2238 fleets

Kneeling and Wheelchair Accessible - Lift or low-floor w/ramp.

**PARATRANSIT VEHICLES***(data as of April 11<sup>th</sup>, 2008)*

Vehicle #	Manufacturer	Model	Year	VIN	License #	Mileage	Location	
104	CHEVROLET	VENTURE	2001	1GNDX03E71D157031	E-1060819	106078	SCT	
105	CHEVROLET	VENTURE	2001	1GNDX03E61D156713	E-1060820	90293	SCT	
106	CHEVROLET	VENTURE	2001	1GNDX03E11D157316	E-1060818	108626	SCT	
107	CHEVROLET	VENTURE	2001	1GNDX03E31D158077	E-1060822	108241	CCAB	
108	CHEVROLET	VENTURE	2001	1GNDX03E31D162095	E-1060821	107270	CCAB	
109	CHEVROLET	VENTURE	2001	1GNDX03EX1D160120	E-1060825	95769	ParaCruz	
110	CHEVROLET	VENTURE	2001	1GNDX03E11D157428	E-1100004	94514	CCAB	
			<b>Fleet Age</b>	<b>7</b>	<b>Count</b>	<b>7</b>	<b>101,542</b>	<b>Avg.Mi.</b>

205	CHEVROLET	VENTURE	2002	1GNDX03E62D158429	E-1120726	119885	ParaCruz	
206	CHEVROLET	VENTURE	2002	1GNDX03E22D155107	E-1120725	111311	ParaCruz	
207	CHEVROLET	VENTURE	2002	1GNDX03E32D155195	E-1101687	115086	ParaCruz	
208	CHEVROLET	VENTURE	2002	1GNDX03E72D155667	E-1101688	116406	ParaCruz	
209	CHEVROLET	VENTURE	2002	1GNDX03E42D156016	E-1146494	70942	ParaCruz	
			<b>Fleet Age</b>	<b>6</b>	<b>Count</b>	<b>5</b>	<b>106,726</b>	<b>Avg.Mi.</b>

305	CHEVROLET	VENTURE	2003	1GBDX23E13D263860	E-1150932	86497	ParaCruz	
306	CHEVROLET	VENTURE	2003	1GBDX23E93D266425	E-1150996	56520	ParaCruz	
307	CHEVROLET	VENTURE	2003	1GBDX23E63D266169	E-1150926	56433	ParaCruz	
308	CHEVROLET	VENTURE	2003	1GBDX23E73D266505	E-1150925	81532	ParaCruz	
309	CHEVROLET	VENTURE	2003	1GBDX23E83D263595	E-1150993	85059	ParaCruz	
310	CHEVROLET	VENTURE	2003	1GBDX23E13D265592	E-1163039	94026	ParaCruz	
311	CHEVROLET	VENTURE	2003	1GBDX23E43D267367	E-1150995	101343	ParaCruz	
312	CHEVROLET	VENTURE	2003	1GBDX23E63D264812	E-1150923	101908	ParaCruz	
313	CHEVROLET	VENTURE	2003	1GBDX23E33D266713	E-1150924	104410	ParaCruz	
314	CHEVROLET	VENTURE	2003	1GBDX23E83D263872	E-1150992	96786	ParaCruz	
315	CHEVROLET	VENTURE	2003	1GBDX23E33D264556	E-1150991	102828	ParaCruz	
316	CHEVROLET	VENTURE	2003	1GBDX23E93D265470	E-1163040	95919	ParaCruz	
317	CHEVROLET	VENTURE	2003	1GBDX23EX3D263288	E-1163038	95412	ParaCruz	
318	CHEVROLET	VENTURE	2003	1GBD23XE53D263845	E-1163037	102305	ParaCruz	
319	CHEVROLET	VENTURE	2003	1GBDX23E33D265786	E-1150994	102011	ParaCruz	
320	CHEVROLET	VENTURE	2003	1GBDX23E03D263848	E-1150933	99574	ParaCruz	
321	CHEVROLET	VENTURE	2003	1GBDX23E83D264830	E-1150930	92817	ParaCruz	
			<b>Fleet Age</b>	<b>5</b>	<b>Count</b>	<b>17</b>	<b>91,493</b>	<b>Avg.Mi.</b>

2401	FORD/GOSHEN	GCII	2003	1FDXE45S43HB85219	E-1172516	65770	ParaCruz
2402	FORD/GOSHEN	GCII	2003	1FDXE45S23HB85221	E-1172519	82297	ParaCruz
2403	FORD/GOSHEN	GCII	2003	1FDXE45S63HB85240	E-1172515	70242	ParaCruz

APPENDIX B: FLEET INVENTORY

Vehicle #	Manufacturer	Model	Year	VIN	License #	Mileage	Location
2404	FORD/GOSHEN	GCII	2003	1FDXE45S	E-1172518	39774	ParaCruz
		Fleet Age	5	Count	4	34,981	Avg.Mi.
2603	FORD/AEROTECH	Aerotech	2006		E-	40773	ParaCruz
		Fleet Age	2	Count	1	40,773	Avg.Mi.
2604	FORD/Transporter	Transporter	2007		E-	2949	ParaCruz
2701	FORD/Transporter	Transporter	2007		E-	3313	ParaCruz
		Fleet Age	1	Count	2	40,773	Avg.Mi.
		Avg. Age	6	Total	34	92,135	Avg.Mi.

## NON-REVENUE VEHICLES

*(data as of April 11<sup>th</sup>, 2008)*

Vehicle #	Manufacturer	Veh. Type	Year	VIN	License #	YTD MILES
121	GMC	Parade Bus	1951	TGH3101496	E-1002012	N/A
842	GMC	Bus	1976	T6H4523N2342	E-681577	861,848
900	RDSTR	Trailer	1984	1M6FERE18E1001099	E-323227	N/A
901	SPCNS	Trailer	1986	CA470970	E-322019	N/A
902	DARGO	Trailer	2003	5HGBC10173M001068	915190	N/A
8026	INTERNATIONAL	Service Truck	1985	HTLDMJL6GHA15346	E-484756	144,425
8027	CHEVROLET	Sedan	1986	GIAW19WOG6142820	E-484717	86,844
9700	FORD	Van	1997	1FMCA11U7VZC24625	E-994290	230,606
9850	FORD	Sedan	1998	1FAFP66Z6WK259982	E-041545	45,549
9950	FORD	Cargo Van	1999	1FTNE24Z6XHB94217	E-1032379	47,127
9951	FORD	Cargo Van	1999	1FTNS24Z7XHB94218	E-1032382	69,906
001	FORD	Van	2000	1FMNE31M3YHA99299	E-1047405	129,720
002	FORD	Van	2000	1FMNE31M6YHA99300	E-1047406	130,180
003	GMC	Van	2000	1GKDM19WXYB545419	E-1087779	78,348
101	FORD	Flat Bed Truck	2001	1FDWF36S81EA24730	E-1087782	25,875
102	DODGE	Van	2001	2B4JB25T41K517327	E-1087781	107,170
103	FORD	Service Body	2001	1FTNF20L51EA53355	E-1087780	34,810
116	TOYOTA	Sedan	2001	JT2BK12U710037002	E-1035705	25,143
201	FORD	Explorer	2002	1FMZU63E22UA23812	E-1087798	214,804
202	FORD	Explorer	2002	1FMZU63E42UA23813	E-1087797	184,792
203	TOYOTA	Sedan	2002	JT2BK18U020042342	E-1120610	13,016
301	FORD	Van	2003	1FDNE31MX3HA85716	E-1161798	81,580
302	FORD	Van	2003	1FDNE31M13HA85717	E-1161797	84,802
303	FORD	Van	2003	1FDNE31M33HA85718	E-1161796	87,892
304	FORD	Van	2003	1FDNE31M53HA85719	E-1161795	84,118
401	CHEVROLET	P/up Truck	2004	1GCEC14T34E338282	E-1168859	19,011
501	HONDA	Sedan	2005	JHMES96625S014802	E-1192214	16,132
502	HONDA	Sedan	2005	JHMES96645S014803	E-1192215	7,787
503	FORD	Explorer	2005	1FMZU63E75ZA68655	E-1192233	102,867
504	CHEVROLET	P/up Truck	2005	1GCGC24U85E265158	E-1192234	12,863
505	CHEVROLET	P/up Truck	2005	1GCGC29UX5E266014	E-1209457	12,498
601	CHEVROLET	P/up Truck	2006	1GCCS146968298943	E-1226369	17,491
602	FORD	Explorer	2006	1FMEU63E56ZA19504	E-1226386	44,304
603	FORD	Service Body	2006	1FDNF20547EA22958	E-1241259	6,760
705	FORD	Sedan	2007	1FAHP34N17W183475	E-1263659	27,002
706	FORD	Sedan	2007	1FAHP34N37W183476	E-1263660	27,594
707	FORD	Sedan	2007	1FAHP34N57W183477	E-1263661	25,974
708	FORD	Service Truck	2007	1FDAF56Y77EB28208	E-1253042	8,869
709	FORD	Sedan	2007	1FAHP34N57W312544	E-1263688	14,595

## APPENDIX C: METRO WEBSITE EVALUATION

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The use of websites by transit agencies has gone from a technical option to an important component of its information system. This change is a direct reflection of how the internet is now a mainstream form of real-time information for today's society. The latest US Census household survey<sup>1</sup> found that 70 million American households, or 62% of total households, had one or more computers and nearly 60% of households use the internet on those computers. This statistic is part of an upward trend in computer ownership that started at only 8% in 1984 and grew 12.6% between 2001 and 2003. Most recently, broadband technologies have sped up the internet connections making surfing the web more accessible and convenient than ever before.

Santa Cruz METRO, like many other transit agencies across the country, should use this resource to inform its current riders of available service options and updates and as a tool to attract new riders. For many transit users the agency's website is the primary source of information, and often times provides the initial representation of the agency. Providing and maintaining an updated, accurate website that is informative and easy to use for the general public, should be a high priority for METRO staff.

A number of resources are available to help transit agencies in developing a successful website. This following analysis used a combination of resources to assess METRO's current website and in the development of recommendations for the website.

### BACKGROUND MATERIALS

General website design heuristics were taken from the practice of usability engineering and human factors engineering. These materials provide guidance of user interface design for websites that lead to increased user efficiency and satisfaction with web-based interfaces. These materials included the useit.com website, *Usability Engineering* (Nielsen, 1994), and *Human Factors Engineering* (Wickens, Gordon, Liu, 1997).

The Transit Cooperative Research Program (TCRP) Synthesis 43 Report: Effective Use of Transit Websites provides a summary of information collected from 47 transit agencies across the US. Information was collected from transit website managers, analysis of server logs showing website usage, market research results from various agencies, and relevant literature.

The Intelligent Transportation Systems (ITS) division of the U.S. Department of Transportation has developed an on-line handbook for the development of public transit websites. This site is located at [www.its.dot.gov/transit\\_dev/guidelines/main.asp](http://www.its.dot.gov/transit_dev/guidelines/main.asp) and provides a summary of design principles for the development of transit websites. The checklist for website recommendation from this sources has been included at the end of this Appendix.

The Federal Transit Administration (FTA) and METRO magazine regularly recognize top websites with the transit industry and publish the results. Due to the rapidly developing nature of website design and the constantly changing interfaces by many of the most advanced transit websites, many have been modified since they were first recognized. A select number of these sites were used and referenced as best in industry examples.

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<sup>1</sup> Data is from the Computer and Internet Use Supplement to the October 2003 Current Population Survey.

Results from METRO's current online survey were also used to obtain METRO-specific usage patterns and preferences. Seventy-five of the most recent results were obtained and coded for use in the analysis.

## WEBSITE CONTENT AND USAGE

The role of web-based communication through an online website is an extremely useful tool in providing direct information to those individuals with access to the internet. This tool has been found to be useful in automating several tasks that were traditionally time consuming and costly for many transit agencies<sup>2</sup>. These tasks include the printing of route schedules, publishing of job listings, and advertising of job procurement opportunities. Web page use has also reduced call volumes to customer service agents, minimizing the time spent in answering questions related to the transit operations and scheduling.

Transit website features and their use differ between agencies. According to the results obtained from 33 transit agencies as reported in the TCRP Synthesis 43 report on Effective Use of Transit Websites, the most common content provided on websites by transit agencies include:

<u>Content</u>	<u>% of Agency Websites Displaying Content</u>
Fares	100%
Schedules	97%
Route maps	94%
Accessibility information	91%
ADA (paratransit) services	88%
Employment	85%
Press information/service updates	82%
System map	79%
Special event information	79%
Procurement information	70%
What's new	67%
Links to other transportation sites	67%

The most commonly used content features are schedules/timetables and maps which can be classified as primary information. The same TCRP report cited that server logs and survey responses from 28 transit agencies found that 96% of all usage was for schedules or timetables and 61% for maps. The other content, or secondary information, which received at least 1% of hits in this study included:

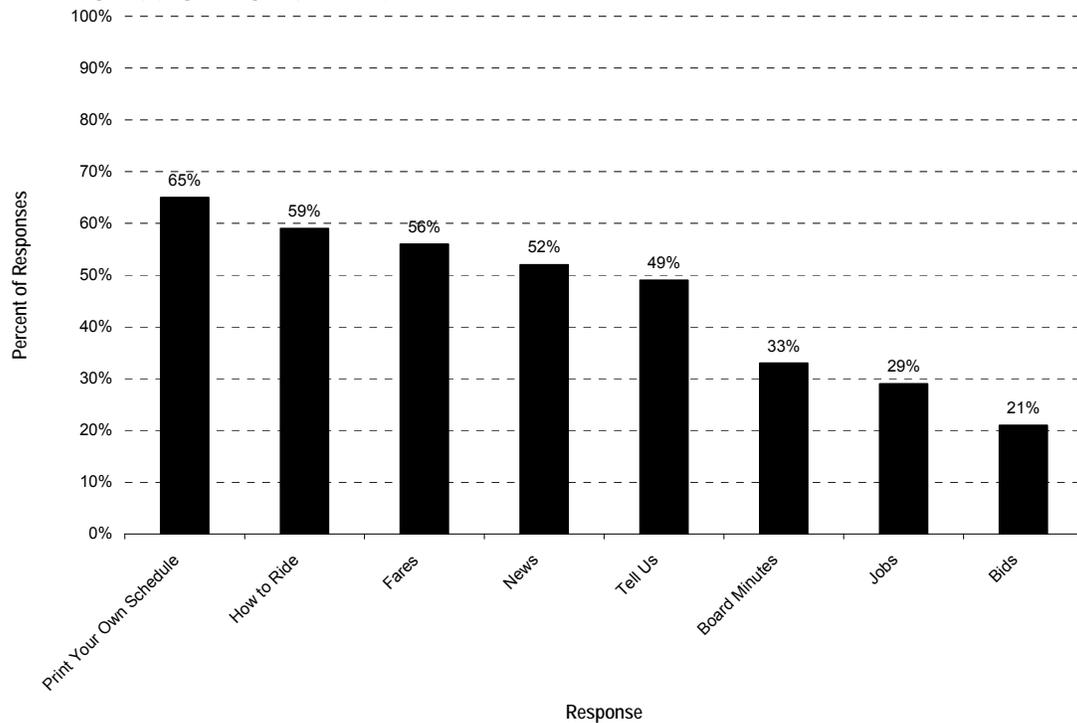
- Fares
- Pass information
- "About the agency" pages
- Employment
- Trip planner
- Various "how to ride" pages

<sup>2</sup> TCRP Synthesis 43: Effective Use of Transit Websites

- News
- Events
- Service expansion information

Similar results for website content preferences were displayed by METRO website users. Figure 1 shows the “Print Your Own Schedule” page was the most commonly accessed page within the website followed by the “How to Ride” and “Fare” page. The usage is much more balanced than the results of the agencies surveyed in the TCRP publication.

**Figure 1: Page by page usage by the respondents**



## ANALYSIS OF CURRENT WEBSITE SURVEY

The current METRO website offers users the ability to complete a web-based survey to solicit feedback on their use and satisfaction with the current website. The link that takes you to the survey simply tells the user “Click Here to Take a Survey”. The website then presents the user with 23 questions (less for those who haven’t ridden a bus or used the site to plan their transit trip) to be answered toward completion of the survey. An open ended comments box is also available at the end of the survey.

The use of the survey results was felt to be important because it was feedback from primary users of the site. A few things should be kept in mind when reviewing the results. The first is the fact that five of the questions on the survey have default responses that indicate favorable preferences. (what do we know about favorable preferences? Cite example) If the user decides not to participate in the survey and hits the Submit Info button at the bottom of the page, these responses would be added the overall results. The motivation of those using the survey may also impact the results. Since the

survey is voluntary, those choosing to participate may be users that are angry or upset about a certain aspect of the service and want to use the link to vent their comments.

With that said, the most recent 75 website survey responses were obtained and used as the sample population. These survey results were coded and analyzed and are presented in chart form in at the end of this Appendix. The key findings from this analysis showed the following:

- Almost half of all users are frequent users of the website (visited the site more than 10 times)
- The most common reason for the website visit was to find bus schedule information (64% of responses)
- Ease of navigation through METRO's site was average, compared to other websites, (42% of responses)
- The majority of respondents felt the webpages loaded quickly (72% of responses)
- 87% of respondents had previously ridden a METRO bus
- 73% of respondents used the information from the website to plan a trip on a METRO bus
  - Of those who used the website to plan a trip, 59% felt the information was very accurate while the remaining 41% felt it was somewhat accurate
  - Of those who used the website to plan a trip, 88% said they would use it again for that purpose
- 67% of respondents who have never ridden a METRO bus said the presence of information on the web would increase their likelihood to ride a METRO bus in the future
- 92% plan to visit the METRO website again
- 91% have access to a computer at home
- 88% have access to a computer at work or school
- 57% of respondents are females and 43% are males
- 45% of respondents live in the city of Santa Cruz
- Over half of the respondents are between the ages of 18 and 35, with another 23% between 46 and 55.

Overall, the respondents seemed relatively content with the performance of the website. As mentioned earlier, the default settings for some of the questions may have resulted in misleading results which should be kept in mind when drawing conclusions from the results.

The general comments portion at the end of the survey was a mixture of complaints resulting from poor on-time performance to suggestions for service improvements. Those relating to the content of the website were the following:

- Include a trip planning tool that creates a transit itinerary based on an origin and destination input
- Give the site a more professional look/update website graphics
- Provide a system map showing all routes

- Allow bus passes to be purchased online

## **EVALUATION OF THE CURRENT METRO SITE**

Using the background materials listed above, the following is an assessment and evaluation of the current website offered by METRO. The end of this Appendix provides screenshots of well designed websites that display organizational and functional features that METRO should incorporate into their site.

### **Inefficient Site Design**

METRO's current website is not lacking in content, but the layout and overall look and feel of the site is cluttered and clumsy. The current interface is text heavy and does not lead the user toward the primary information of interest. The long loading time of the home page, low graphic resolution, and lack of organization are areas METRO should improve upon.

### **Lack of Trip Planning Tools**

Frustration may arise from new users during their visit. The lack of a trip planner or system map does not allow new users (student, resident, tourist, etc.) to find out which route they can take to get from their origin to their destination. This could result in a missed opportunity for a new rider or a loss of a current rider.

### **Untimely Information Updates**

The website fails to provide consistently updated information for its users. According to the site monitor located at the bottom of the home page, the current homepage was last updated July 9<sup>th</sup>, 2001. Other pages have experienced more recent updates, such as the News page updated on January 4<sup>th</sup>, 2007. The lack of updating these pages shows users the site is unmaintained and deters users from relying on the site for scheduling or service changes that could significantly affect their trip.

### **Lack of a Professional Image**

The current website is quickly becoming outdated.(source – example) With the rapid development of the website design industry and flash technology, today's websites are much more advanced than those of just a few years back. METRO's website reflects the look and feel of a website of the past. This representation of the agency on web portrays an unprofessional image for METRO that should be addressed in future builds.

### **Difficult Usability of Website**

Usability gives the site its functionality for the user, which is a key measure of how good the site really is. In the context of web design, usability is commonly defined by; the ease of learning how to use the site, the efficiency of the use at the site, the memorability of functionality within the site, the minimization of errors while using the site, and the overall satisfaction of use at the site. METRO's current site displays characteristics such as inconsistent navigation bar locations and an abundance of text that decrease the usability and extend search times for the user.

## **RECOMMENDATIONS FOR METRO**

METRO's current website is becoming outdated and lacks many of the modern design features and heuristics that are common among today's transit websites. (for example) The following recommendations were developed using the results of METRO's current online survey, results from

other transit agency's experiences with website use, and usability engineering principles as they relate to website design.

METRO's current website survey results were used alongside industry best-practice standards (developed by...) to develop recommendations METRO can use to update and/or recreate its current website. These recommendations are presented below in the areas of interface design, site functionality, and marketing.

## Interface Design

To improve the usability of METRO's site and increase the aesthetic and professional image of the page, the following recommendations are suggested. To help illustrate these recommendations, five transit agency home web pages have been provided at the end of this Appendix. These sites were recognized by either the FTA or METRO magazine as good examples for transit websites.

1. **Brand the site to reflect the identity of the agency (METRO).** Displaying a nice clean logo and maintaining a color scheme representative of the agency (yellow and blue) will give the site a look and feel that is representative of the agency.
2. **Provide a universal navigation bar and prioritize its contents.** The home page should set the standard for the navigation bars and they should not change appearance or location within the other pages of the website. This standardized navigation will help the user keep track of where they are on the site and improve navigability.

Information presented in the navigation menu should be prioritized based on use. Results from the METRO website usage shows route/system map and schedule information account for 70% of all primary uses of the website. Research from other website usage revealed that these functions accounted for nearly 96% of all activity on transit websites. These results highlight the importance of these functions which should be given priority in the navigation element of the site's design.

Secondary use information should be located further down (vertical design) or to the right of (horizontal design) the primary functionality on the navigation bar. Secondary and primary information links should also be located at the bottom of all webpages. Placing these links in both places will allow the user to navigate at the top of the page and at the bottom if the page extends further than one screen.

3. **Incorporate icons.** Icon use increases the legibility of a site which will lead to a reduction in search time and user frustration. Icons are also universal in language which can communicate to a larger audience.
4. **Improve readability and legibility.** If text is appropriate on the page, be sure to maintain a good contrast between it and the background. This usually means a dark text on a white background or a reverse out using a white text on a dark background. The white background tends to be the preferred method but both are effective. The use of serif fonts should also be avoided.

## Site Functionality

The usefulness of the site to the user varies based upon the functions available to them. Technological advances now allow transit websites to offer full trip planning application and real-

time monitoring services. These advances in technology have changed the role of websites from a static posting board of information to a dynamic streaming source of information, increasing the overall usefulness of the site, as well as the cost and amount of programming required. (what amount of time/energy/\$ needed to update site on ongoing basis?) Today's Internet user commonly expects this level of functionality and METRO should make efforts to include these in its website update. The following recommendations are suggested for METRO to incorporate in their updated website:

1. **Include the option of dynamic trip-planning tools.** Trip planning tools found on transit agency websites allow users to enter an origin, destination, and departure or arrival time and have a detailed trip itinerary be produced. This tool should provide this information for the service area and also refer the user to other agency trip planning tools (511.org, MST trip planner, Greyhound, etc.) if the origin or destination is outside METRO's service area.

Trip planning tools range in sophistication based upon the software capabilities of the agency. The more advanced tools allow the user to input a specific origin and destination address, start or end time of day for the trip, and fare category and then provide estimated travel costs and travel times for all modes included in the trip including walk time to the transit station and transfer wait times. Less expensive (do we know range of costs?) tools simply provide the user with a pre-determined list of origins and destinations within the service area and options for departure/arrival times from which an itinerary will be produced based on a simple query function. (what does it take to put that info together – both time and cost – who did current site?)

One option for implementing this tool would be to purchase a module to interface with METRO's current scheduling software. HASTUS, METRO's current scheduling software, offers modules that allow trip planning functionality to be used with a web browser. The HASTINFO module for trip planning can work with METRO's current HASTUS database to provide its customers with this functionality. Agencies currently using this trip planning tool online include Orange County Transportation Authority (OCTA), Kansas City Area Transportation Authority (KCATA), Mississauga Transit in Ontario, Canada, and Charlotte Area Transit System (CATS).

METRO should also consider interfacing with Google Transit™ Trip Planner to provide trip scheduling functionality for its users. HASTUS announced last December that their interface is now compatible with the Google Transit™ program, allowing a direct feed of the necessary information to the application. METRO should consider pursuing this option and providing a link to Google Transit™ from their website for those users interested in the trip planning functionality. Nine of the current twelve transit agencies that use Google Transit are HASTUS users, demonstrating the high degree of compatibility between the two systems.

2. **Allow email exchange to occur between METRO and its users.** Email is a key method of communication in today's society and an easy way for METRO to keep connected with its riders. This form of communication requires METRO to obtain email addresses from its users. These addresses can be obtained through a number of different methods including a link on their website or an on-board flyer. METRO can also incorporate a question into other survey forms that asks the user for their email and whether or not they would like to receive updates via email. This communication method allows METRO to keep their riders informed of immediate service issues such as construction delays and community outreach events.

3. **Allow schedules and route maps to be downloaded to a portable wireless device.** Many transit websites allow schedules, route maps, stop information, and system updates to be downloaded directly to a portable device such as a PDA, cell phone, or Apple iPOD. Agencies with GPS equipped vehicles and wireless transmittal technology also offer NextBus technology that provides real-time information of bus and rail cars location to the user in the field via their wireless device.

A wide range of functionality exists between the various ways agencies provide this tool. Although METRO currently does not possess the GPS technology required for many of these web-based tools to exist, it should be a future goal of the agency. The more sophisticated websites use NextBus technology which provides up to the minute information showing where a current bus is located along its route and when it is anticipated to arrive at a specified stop. Less sophisticated tools simply provide the user with a screen shot of their vehicle monitoring screen which shows the location of all the vehicles within the system. The updating properties are based upon the specified refresh rate of the web-based application. (more info on cost etc.)

4. **Design for the METRO user.** METRO's passenger profile data from the recent fixed route on-board survey shows that nearly half of passengers using the system are between the ages of 18-23. These ages tend to rely on the Internet for their primary source of information and media. Enhancements to the current site will be appreciated by these users.

Although many of the current users may be computer/Internet savvy, the site should also accommodate those who are not as familiar with the internet including the elderly population and/or speak Spanish as their primary language. To meet the needs of these users, the website's interface should be relatively simple and intuitive. Text, icons, and hyperlinks should be legible and simple to read. The site, or another form of the site, should also be available in Spanish for those who do not speak English as their primary language. (ask UCSC and Cabrillo students for ideas? Can any of tech stuff be done by UCSC??)

5. **Provide schedules and maps that are user-friendly.** Due to the high demand of schedules and map information on transit agency websites, their presentation on the website should be carefully designed. As stated earlier, the link to their location should be given priority on the home page and may even warrant a separate link outside the standard navigation bar.

The formatting of maps and schedules should be provided in both html and pdf formats. The html format loads quicker and should be the default setting for the website. The pdf format allows the maps and schedules to be formatted to a printable version and allows additional functionality provided by the third party (Adobe) software such as zooming capabilities.

The website's maps should be easy to use and provide the user with reference points to assist in the legibility. Displaying the major roadway network, local streets which the route operates on, adjacent routes, all designated stops (either on the map or in a list), transfer locations, and major landmarks to orient the rider of the routes location should be a goal of these maps.

## MARKETING

The website should be used as a tool for METRO in its pursuit to recruiting and retaining transit users. The interface design and site functionality recommendations will give METRO a website that meets the needs of the transit user. The marketing component of this tool will help increase its exposure and use. The following recommendations were collected from the background reference materials listed above and should be considered by METRO.

1. **Advertise the site.** The website URL address should be included on all marketing material and displayed alongside the mailing address in the agencies contact information. This address could also be displayed on the agency's vehicles, fare medium, and schedules/system map. (example)
2. **Link the site.** METRO should create links to complimentary sites including regional transit providers, higher learning institution, car-share vendors, and tourist-related websites in Santa Cruz and the greater service area. An effort should then be made to have these outside website include METRO's link on their website.
3. **Meet the needs of special user groups.** METRO should consider design special features into the website that addresses the specific needs of certain user groups such as college students, tourists, and over the hill commuters and disability community – aren't there standards for disability comm users?/These pages can provide these users with specific resources that will help them plan their trip with METRO and increase ridership systemwide.

## US DOT INTELLIGENT TRANSPORTATION SYSTEMS HANDBOOK RECOMMENDATIONS FOR TRANSIT WEBSITE DEVELOPMENT

Available online at: [www.its.dot.gov/transit\\_dev/guidelines/main.asp](http://www.its.dot.gov/transit_dev/guidelines/main.asp)

### STRUCTURE AND CONTENT

	Item
□	<p><b>Information on where and when service is provided is grouped together and subdivided as Itinerary Maker, System Map, Route Maps, Schedules, and Place Directory</b></p> <p>Each of these may be on different pages and use different menu items, but they should still be near each other.</p>
□	<p><b>System Map is provided.</b></p> <p>Not necessary for transit systems with one or less scheduled routes.</p>
□	<p><b>Itinerary maker or place directory provided.</b></p> <p>An itinerary maker displays an itinerary using information obtained through an electronic form for origin, destination, and times.</p> <p>A place directory is a list of all places (e.g., streets) in the service region with the routes that serve them. An itinerary maker is preferred but tends to be more expensive.</p> <p>Not necessary for transit systems with one or fewer scheduled routes.</p>
□	<p><b>All route-specific information together organized by route.</b></p> <p>All transit systems with scheduled routes should have schedules (timetables) on the site.</p> <p>Any routes with more than two stops should have a route map on the site.</p> <p>May also include:</p> <ul style="list-style-type: none"> <li>• Descriptions of each stop including its exact location, map (e.g., of a large station), parking availability, bicycle or pedestrian access, and accessibility.</li> <li>• The real-time state of elements of the transit system, such as the location of each train, or the estimated time for the next bus at a particular stop. As long as the resulting page is not too long, the route map, schedule, and other route information may all be one page.</li> </ul>
□	<p><b>Information across modes grouped together.</b></p> <p>For example, the site should not be divided into bus and subway service.</p>

	Item
<input type="checkbox"/>	<p><b>Information about fares grouped together.</b></p> <p>As applicable for the transit system, this should include:</p> <ul style="list-style-type: none"> <li>• Cost information</li> <li>• Available discounts including details of any limitations.</li> <li>• Transfer policies.</li> <li>• Available types of fare media.</li> <li>• Payment options, both when paying on the transit vehicle and when purchasing fare media.</li> <li>• Locations where fare media can be purchased.</li> </ul> <p>May include a capability to purchase fare media on line.</p> <p>Explicitly say that the fare is free if that is the case</p>
<input type="checkbox"/>	<p><b>Rules, policies, regulations, and tips for transit customers all grouped together.</b></p> <p>This should include:</p> <ul style="list-style-type: none"> <li>• Policies and regulations for using the service.</li> <li>• Advice and explanations on using it (e.g., how to read a schedule, how to signal a bus, dates when service is attenuated or suspended, places or procedures to get printed copies of maps and schedules).</li> </ul>
<input type="checkbox"/>	<p><b>Accessibility information grouped together.</b></p> <p>This includes any demand-response service provided to the disabled or elderly. If such service is provided, the site should provide:</p> <ul style="list-style-type: none"> <li>• Geographic region serviced, and times and dates provided.</li> <li>• Qualifications a customer must possess to qualify for service, including detail on any documentation the customer must provide.</li> <li>• The application procedure a customer follows to seek approval to use service. May include contact information and application forms for downloading or on-line submittal.</li> </ul> <p>The site may also provide an explanation or feature for requesting service for a particular trip, including a means to check and cancel requests. An on-line request feature typically needs</p>

	Item
	to be provided in a secure portion of the site.
□	<p><b>All business and administration information grouped together.</b></p> <p>This should include:</p> <ul style="list-style-type: none"> <li>• Employment opportunities in the transit system, the procedure for applying, and any necessary contact information.</li> <li>• Likewise for contracting opportunities.</li> <li>• Announcements of public meetings.</li> </ul> <p>This part of the site may also include:</p> <ul style="list-style-type: none"> <li>• Press releases and general announcements other than those immediately affecting trip planning (e.g., appointment of new personnel, approval of a new budget, start of new construction, purchase of new vehicles).</li> <li>• Management, personnel, and institutions charged with operating the transit system.</li> <li>• History of the transit system.</li> <li>• Operating statistics of the transit system (e.g., average riders per day, annual budget).</li> </ul> <p>None of this information should be on the home page, and the link for this information should not be on the menu.</p>
□	<p><b>Contact Information grouped together.</b></p> <p>This includes phone numbers, email, and physical mail addresses for comments, compliments, complaints, or questions about the transit service or the web site.</p> <p>All web sites should at least have a telephone number.</p>

**The following content is also recommended:**

- Rider alerts that immediately affect trip planning, such as permanent or transitory changes in schedules, routes, or fares.
- Search feature that lists links to all pages that contain user-entered words (recommended if over 100 pages in the site).
- Site index or outline of links to all pages in the site (recommended if over 20 pages in the site).

- Links to web sites likely of interested to transit system customers. These includes sites for
  - Other transit systems in the same area.
  - Intercity train or bus terminals.
  - Airports.
  - Ferry services.
  - Traffic information.

Riders may also appreciate links to common destinations such as schools, universities, parks, sports arenas, or tourist attractions.

Some transit web sites also choose to have a "Kid's Zone" with games, quizzes, and facts aimed at young children.

## Menu and Labels

	Item
□	<p><b>A menu is provided for accessing the site's most used information for trip planning.</b></p> <p>Typically, the menu includes links for Home, the Itinerary Maker, System Map ("Complete Map"), Route Maps, Schedules, Place Directory, Fares, Rules and Tips, and Contact Information.</p> <p>It generally does not include links to administrative information or to demand response services (when scheduled services are provided).</p>
□	<p><b>The menu is on all pages.</b></p> <p>It is placed either at the top or along the left side of the page.</p>
□	<p><b>A selected menu item looks different than a menu item you are pointing to.</b></p>
□	<p><b>Link to the home page is in upper left corner of every page.</b></p> <p>The logo of the transit system is often effective for this.</p>
□	<p><b>Itinerary maker labeled as "Itinerary Maker," with an icon of a list coming from a computer.</b></p>
□	<p><b>The System Map is identified as "Complete Map," with an icon of a paper system map.</b></p> <p>The term "system map" should never appear anywhere in the site.</p>
□	<p><b>Route information labeled "Routes" along with an icon of a single solid arrow following a path.</b></p> <p>Pages that show only the route map without a schedule should be labeled "Route Maps."</p>

	Item
□	<p>Schedules labeled as "Schedules" or "Timetables," with an icon of a clock face.</p> <p>Use either "schedule" or "timetable" consistently throughout your site.</p>
□	<p>Place directory labeled as "&lt;Place Type&gt; Directory" with an icon of a signs pointing directions to places.</p> <p>For example, a directory of streets would be labeled "Street Directory."</p>
□	<p>Fare information labeled as "Fares," with an icon of a dollar sign.</p>
□	<p>Rules and tips labeled as "Rules &amp; Tips" with an icon of the international "No" symbol.</p>
□	<p>Contact information labeled as "Contact Us", with an icon of a telephone handset.</p>
□	<p>The other content is labeled as follows:</p> <ul style="list-style-type: none"> <li>• "Special Services": Services for the elderly and disabled.</li> <li>• "About Us": Administrative information.</li> <li>• "Rider Alerts": Changes to routes or fares</li> <li>• "Kid Zone": Content for young children.</li> <li>• "Site Directory": Site index.</li> <li>• "Links": Link lists.</li> </ul> <p>These should be links on the home page, not on the menu for every page.</p>

**ALL PAGES**

To expedite the evaluation, these items may be checked while also checking the home page, itinerary planner, maps, schedules, and place directory using the subsequent items for those Specific Pages.

	Item
<input type="checkbox"/>	<b>Place information collections on moderately sized pages.</b> As a rough rule, no page should be longer than about 30 brief paragraphs.
<input type="checkbox"/>	<b>Location of the page in the site is indicated.</b> For example, a heading shows the section and sub-section the page is in.
<input type="checkbox"/>	<b>You can link to a more general page.</b> For example, you can link up from a particular schedule to a list of all schedules without using the Back button.
<input type="checkbox"/>	<b>When at the bottom of the page, you can link to site's main areas without scrolling.</b> The "main areas" are the same as those linked with the menu.
<input type="checkbox"/>	<b>Title bar title is the transit system name followed by page label.</b>
<input type="checkbox"/>	<b>Each page has a uniquely displayed title bar title and URL.</b>
<input type="checkbox"/>	<b>Pages are easily read on a 600x800 screen.</b>
<input type="checkbox"/>	<b>Page completely downloads in 10 seconds or less when using a dial-up modem.</b>
<input type="checkbox"/>	<b>Flash, Acrobat (PDF), and other plug-ins are only used when absolutely necessary.</b>
<input type="checkbox"/>	<b>Large amounts of text are neatly broken up and labeled.</b>
<input type="checkbox"/>	<b>Most important and general information is first on the page.</b>
<input type="checkbox"/>	<b>A balance of emphasis visually indicates the page structure.</b> Color, boldness, and size of letters makes the outline of the page clear.
<input type="checkbox"/>	<b>Page produces interpretable printouts.</b> For example, tables are not cropped when printed.
<input type="checkbox"/>	<b>Page is free of technical errors.</b> For example, no "page cannot be found " or other error messages
<input type="checkbox"/>	<b>All text strongly contrasts with background colors.</b>
<input type="checkbox"/>	<b>Background graphics or colors limited use, size, and intensity.</b>
<input type="checkbox"/>	<b>Graphics content is as simple as possible.</b>
<input type="checkbox"/>	<b>All words are text not graphics.</b>

	Item
	You should be able to select and copy any word.
<input type="checkbox"/>	<b>No animation and other moving imagery.</b>
<input type="checkbox"/>	<b>All text is large and easy to read including text in maps and other graphics.</b> All normal text should be at least this large.  This is too small
<input type="checkbox"/>	<b>All text is mixed case not ALL CAPITALS.</b>
<input type="checkbox"/>	<b>Lists sorted to make scanning as fast as possible.</b>
<input type="checkbox"/>	<b>Text communicates key information with the fewest words.</b>
<input type="checkbox"/>	<b>Links are only to frequently needed pages for the current page.</b> Any information referred in the page should be linked.
<input type="checkbox"/>	<b>Links and only links use underlining and a specific color.</b> All links should be one color, and that color should not be used for any other text.
<input type="checkbox"/>	<b>You can tell what you are selecting when using a link in a graphic</b>
<input type="checkbox"/>	<b>Each link labeled with the specific name of its destination.</b> For example, no links labeled "Next" or "Top of Page."
<input type="checkbox"/>	<b>It is clear when a link goes to another site.</b>

## SPECIFIC PAGES

### *Home Page*

	Item
<input type="checkbox"/>	<b>Home page fully utilized to provide information and links useful for trip planning.</b> A home page should not be dominated by decorative graphics or marketing language.
<input type="checkbox"/>	<b>Transit system and region served clearly identified.</b>
<input type="checkbox"/>	<b>Links provided, as applicable, for Special Services, Administration ("About Us"), Children's Section ("Kid Zone"), the Site Directory, and link lists.</b> Information such as this should be accessed from the home page, not the menu used on every page.
<input type="checkbox"/>	<b>Any specific schedule can be accessed in two clicks or less.</b>
<input type="checkbox"/>	<b>Rider alerts are shown on the home page as headlines with date, affected route(s), and brief summary of the change.</b>

	A single "Rider Alert" link to a page of such headlines is not sufficient
--	---

## Maps

To expedite the evaluation, you can check just two or three representative route maps.

	Item
<input type="checkbox"/>	Map images must not be too large to view on a 800x600 screen or download in less than 10 seconds, but text and symbols must not be too small to be easily legible  In most transit systems, a low-detail summarizing map of the entire system links to progressively more detailed maps until stops can be shown, but simple transit systems may be able to have a single reasonably-sized and readable map of the system that has enough detail.
<input type="checkbox"/>	All maps have North up.
<input type="checkbox"/>	Each map includes significant roads, places, and other features to indicate scale and location.  For example, it is not sufficient to show only the portions of roads on which a bus operates.
<input type="checkbox"/>	Routes on system maps are distinguishable by being shown in different shades and colors.
<input type="checkbox"/>	Maps include a legend showing how routes are represented.
<input type="checkbox"/>	Clicking a map shows more detail at the place you clicked.
<input type="checkbox"/>	You can move among maps geographically laterally.  For example, when a detailed system map is divided among pages, links on each page take you to adjacent map pieces
<input type="checkbox"/>	The effect of clicking on a map is indicated somehow.
<input type="checkbox"/>	With each route map, there is a consistently structured text description of the route.

## Itinerary Maker

	Item
<input type="checkbox"/>	The electronic form includes instructions, examples, and specific control labels.
<input type="checkbox"/>	Ambiguous or imprecise locations are handled effectively.  For example, the itinerary planner lists the best matches of a location entered by a user.
<input type="checkbox"/>	The Results page shows the itinerary planner's interpretation of your input.
<input type="checkbox"/>	Multiple alternative itineraries are generated that all approximately fit your input.
<input type="checkbox"/>	The steps of an itinerary are in chronological order.

## Schedules

To expedite the evaluation, you can check just two or three representative routes.

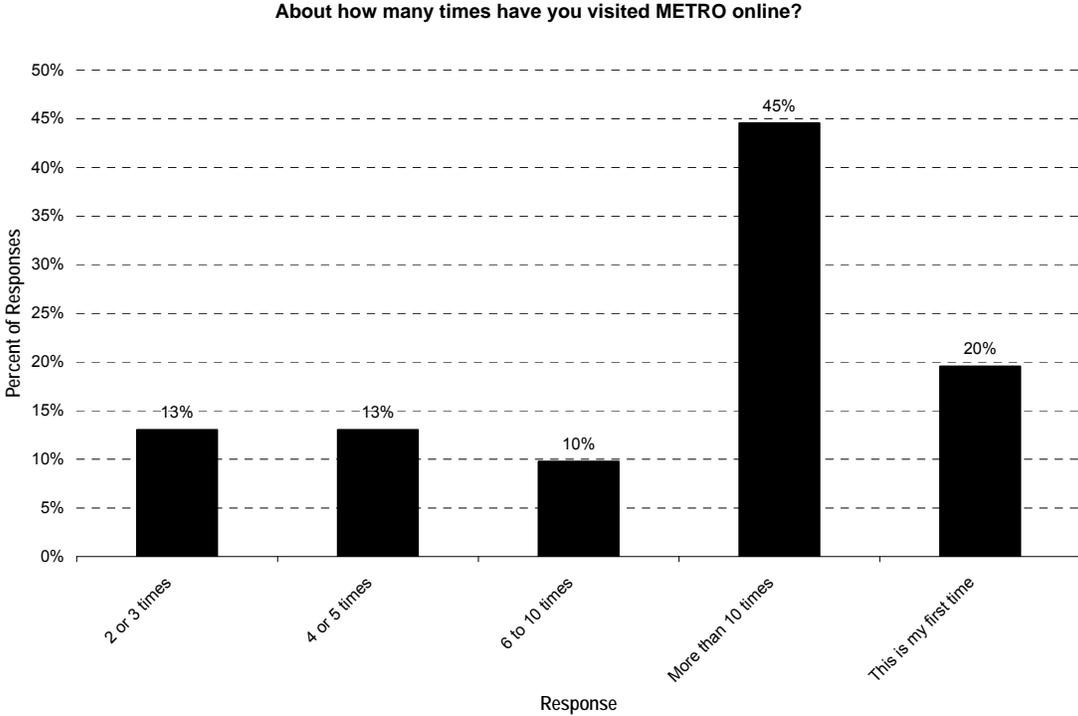
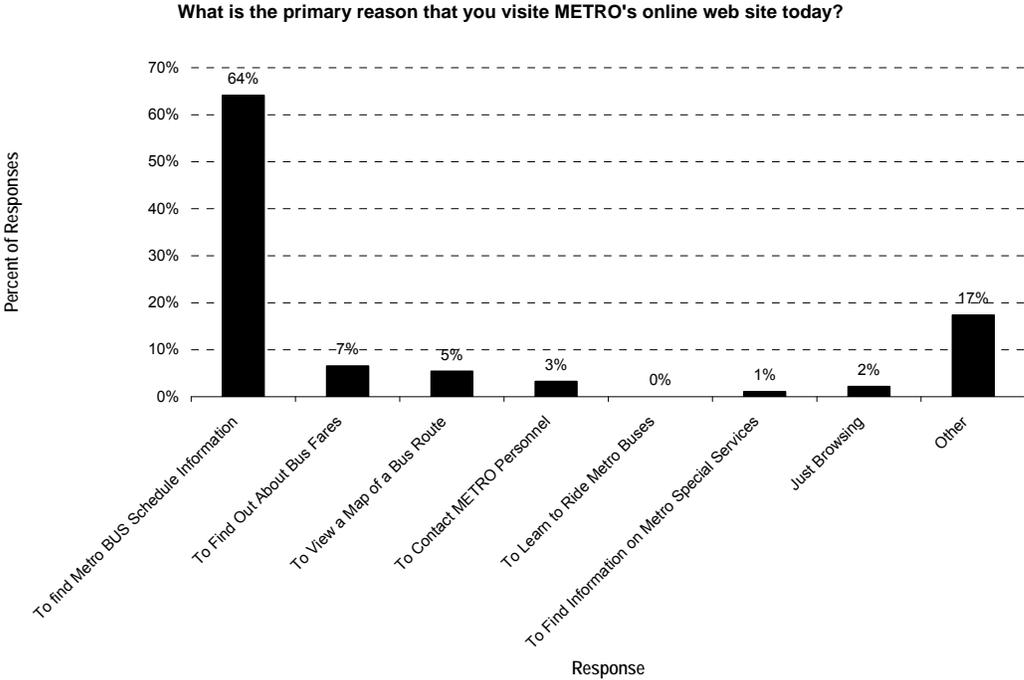
	Item
<input type="checkbox"/>	<p>Rider alert links or information is shown for the schedule they apply to.</p> <p>Such a link or information should only be for an alert that pertains to the displayed schedule</p>
<input type="checkbox"/>	<p>There is no more than one link between a route's schedule and map.</p>
<input type="checkbox"/>	<p>There is no more than one link between a route's schedule and fare information that pertains to that route.</p>
<input type="checkbox"/>	<p>A guide for how to read the schedule (or a link to such a guide) is provided from the schedule page</p>
<input type="checkbox"/>	<p>Schedules are compact but legible.</p> <p>For example, column headers should not stretch the table out unnecessarily.</p>
<input type="checkbox"/>	<p>Table column headers are always in view when the schedule is shown on a 800x600 screen.</p> <p>You should not have to scroll up to see what stop a particular time is for.</p>
<input type="checkbox"/>	<p>Approximately every fifth table row has a divider.</p> <p>Every row should not have a rule.</p>

## Place Directory

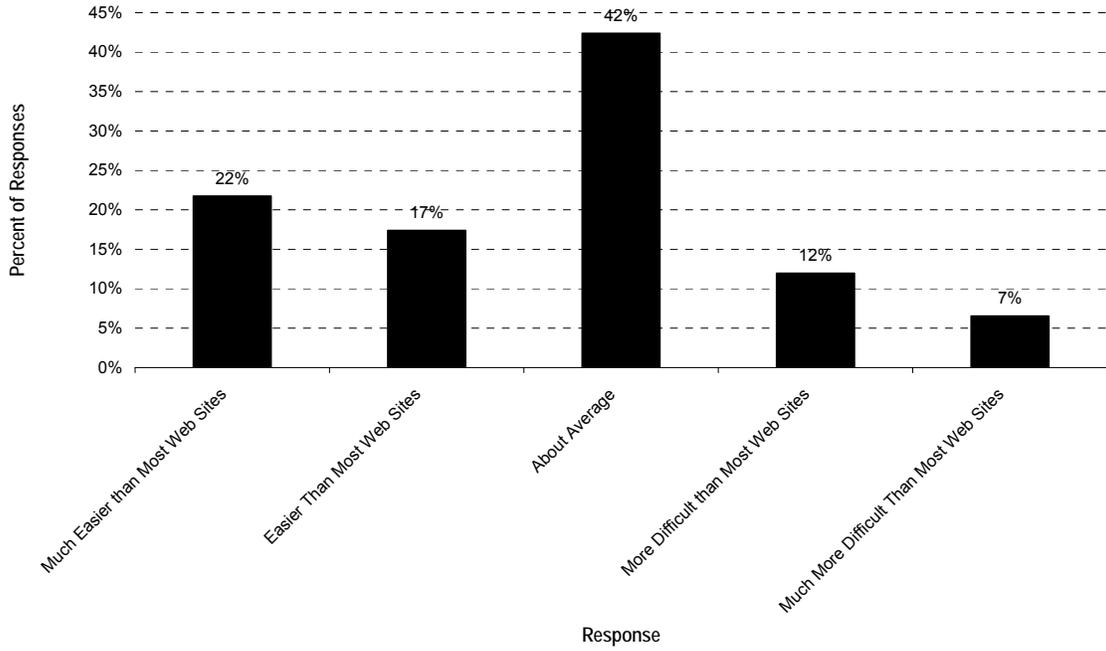
	Item
<input type="checkbox"/>	<p>Place directory is an alphabetically sorted list of places of the same type as the stops.</p> <p>For example, a bus route with stops along the street has a list of streets, while a commuter rail route with stops in various outlying towns has a list of towns.</p>
<input type="checkbox"/>	<p>All major geographic places in the service region are included in the list.</p> <p>The list is not limited to places the routes travel on or stop at. For a street directory, the street index of a commercially available map of your region is a good approximation of the necessary content of a street index.</p>
<input type="checkbox"/>	<p>Places that may be referred to by more than one name are listed under all such names.</p> <p>For example, North Maple St. is found under both "North Maple" and "Maple, North."</p>
<input type="checkbox"/>	<p>Places served by more than one route list each route distinctly.</p> <p>Indicate how each route serves the place differently (e.g., one train is an express, or bus is best for Maple St between 14th and 18th Ave. only).</p>

<p>□</p>	<p><b>A concise description of key features of the transit system structure is given.</b></p> <p>This should include information useful for narrowing down the choice of routes, especially for users that cannot use a system map.</p>
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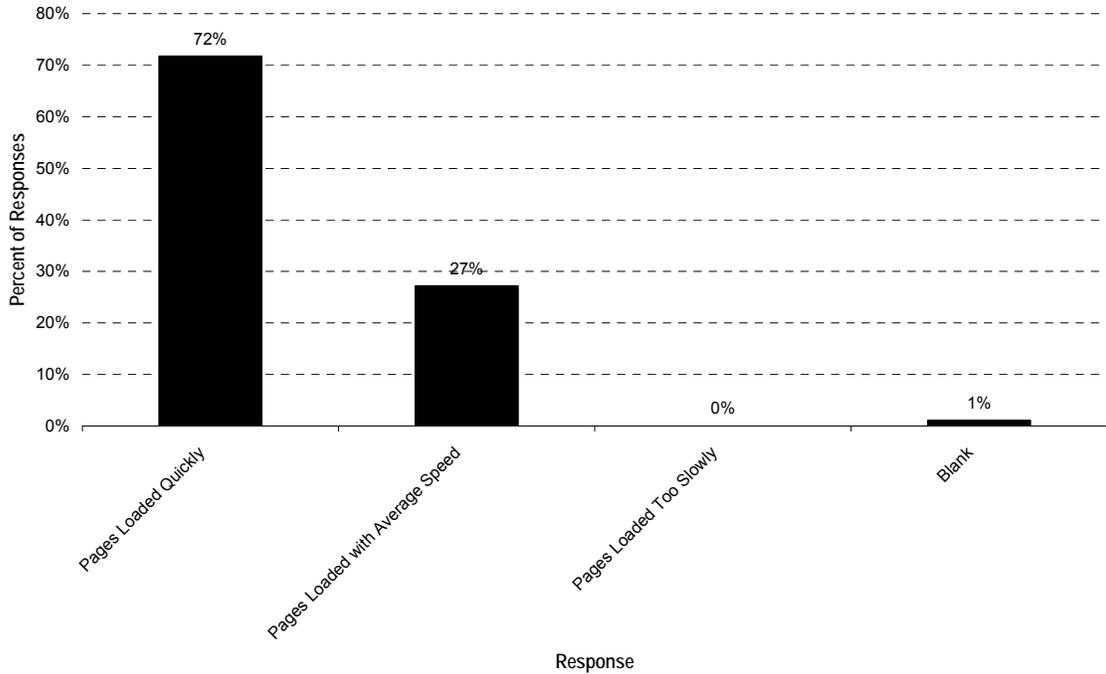
# METRO WEBSITE SURVEY RESULTS



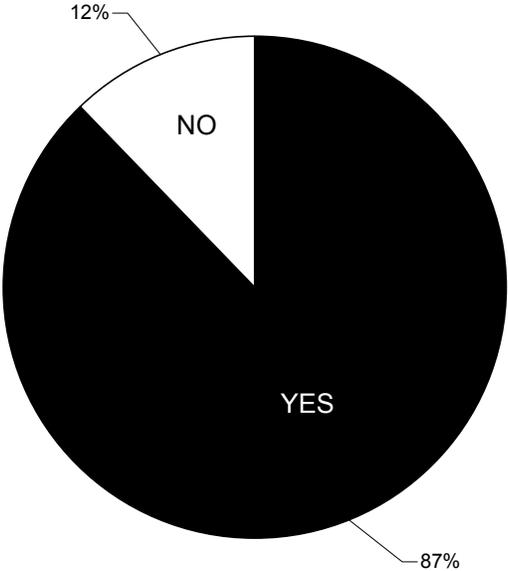
**Compared to other web sites that you visit, did you find it easy or difficult to navigate through METRO's web site to the information that you wanted?**



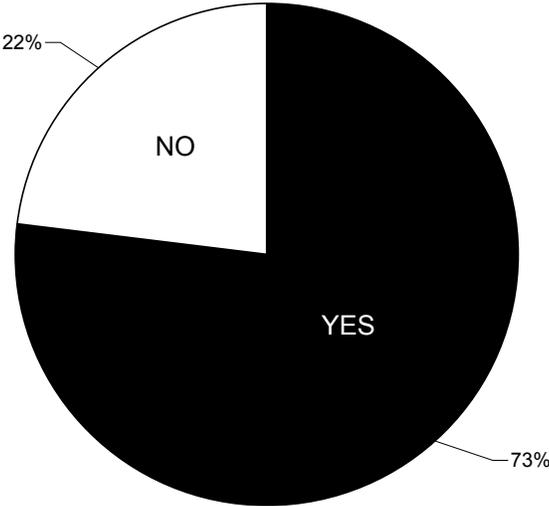
**While navigating through the METRO web site, how fast and responsive did you find it?**



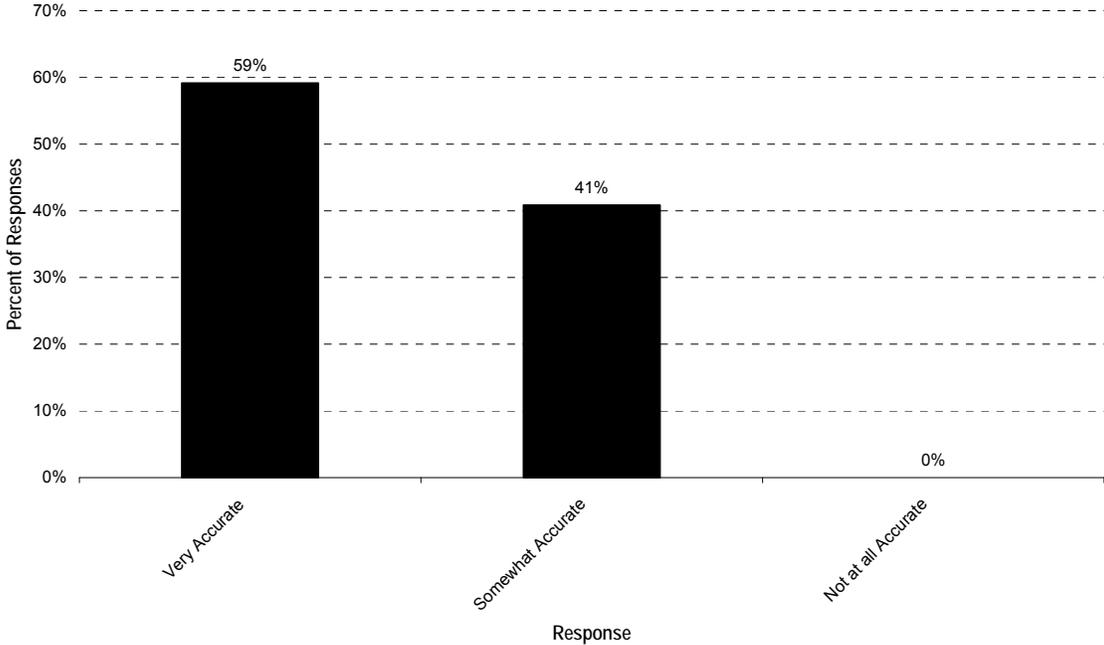
Have you ever ridden a METRO bus?



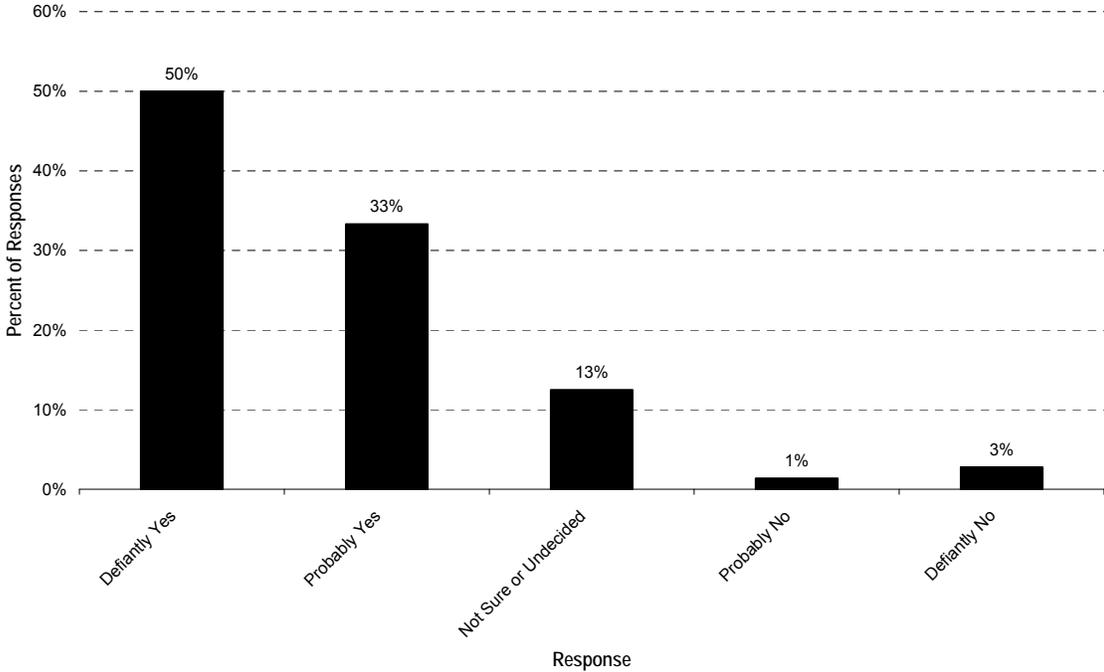
Have you ever used the information from METRO's web site to plan a trip on a METRO bus?



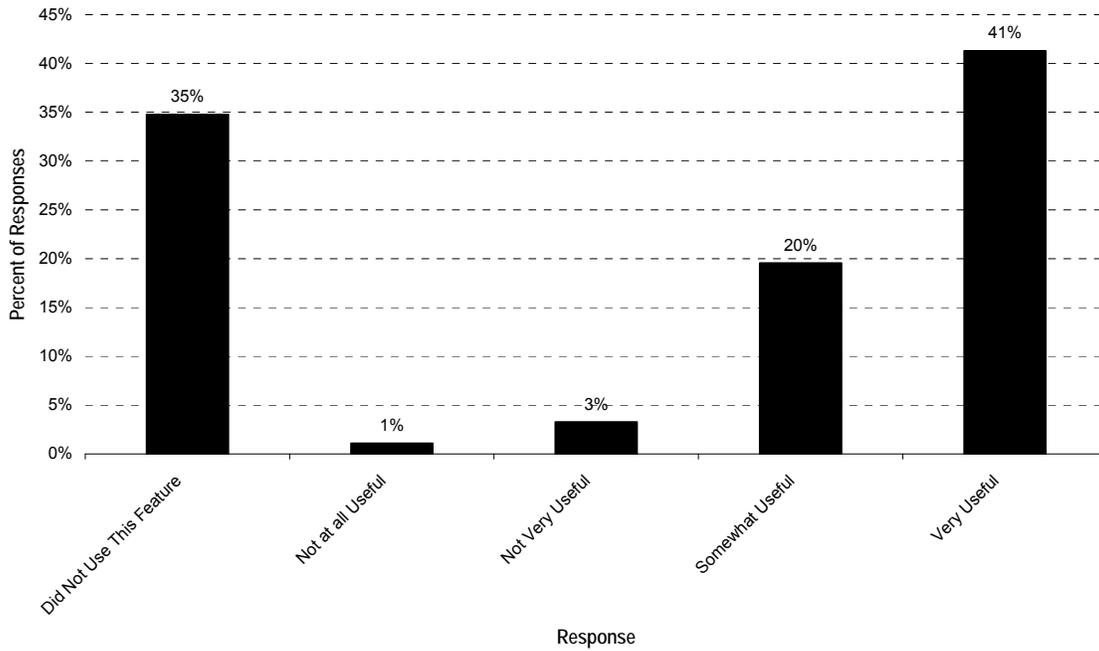
**If you have used the METRO web site to plan a trip, how accurate was the information provided?**



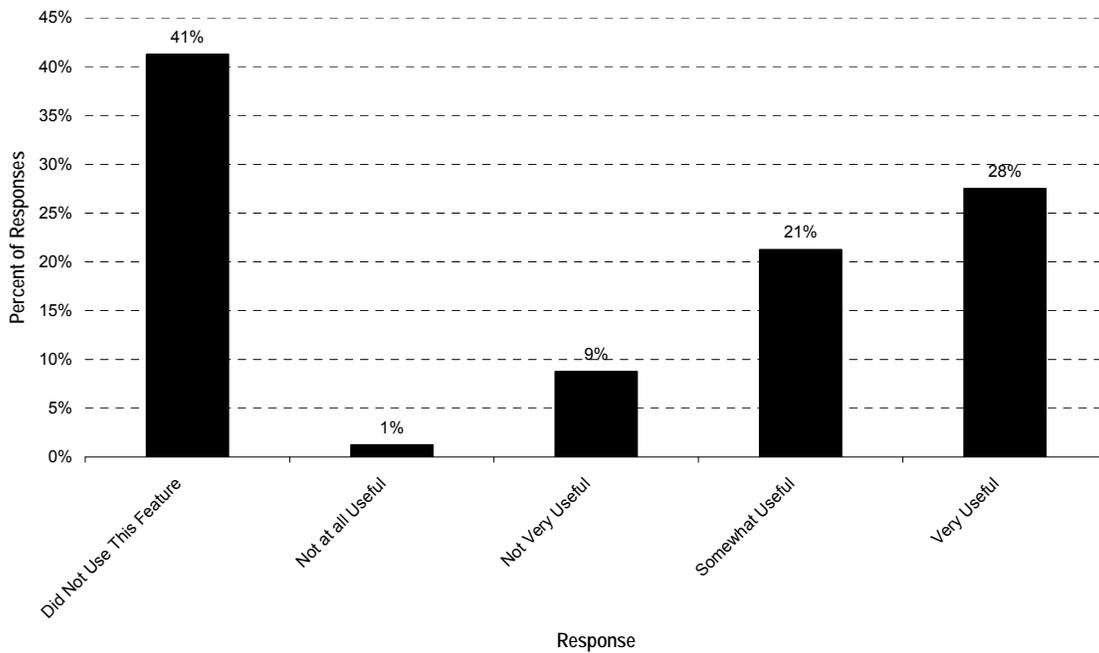
**If you have used the METRO web site to plan a trip, will you use it again for trip planning?**



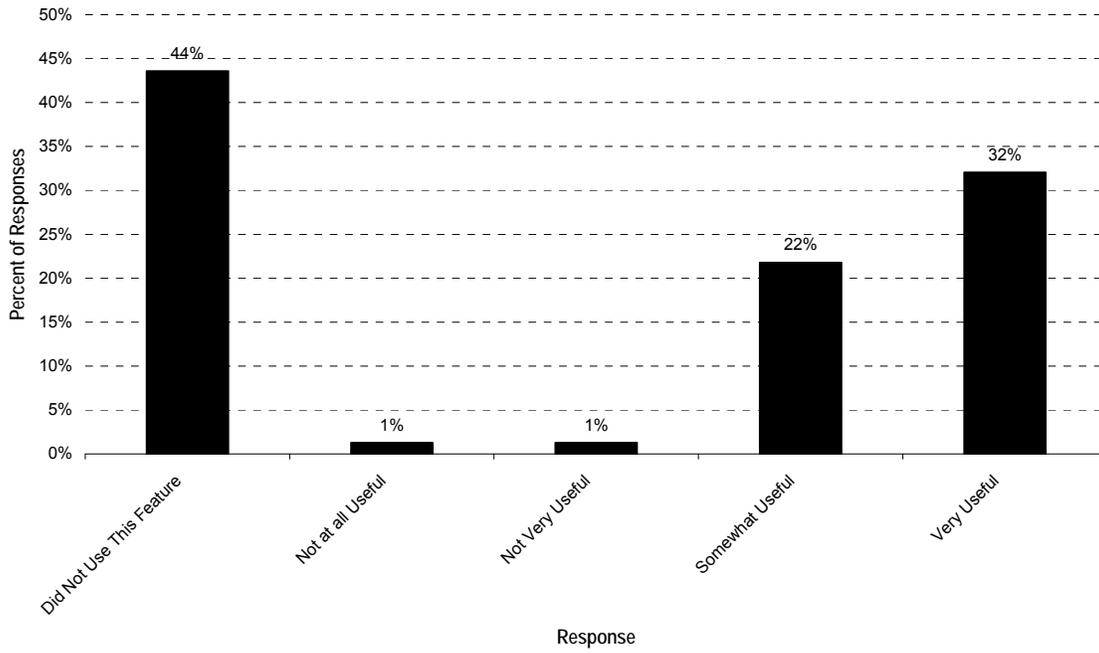
How useful was the following source of information on the METRO website?  
 "Print Your Own Schedule"



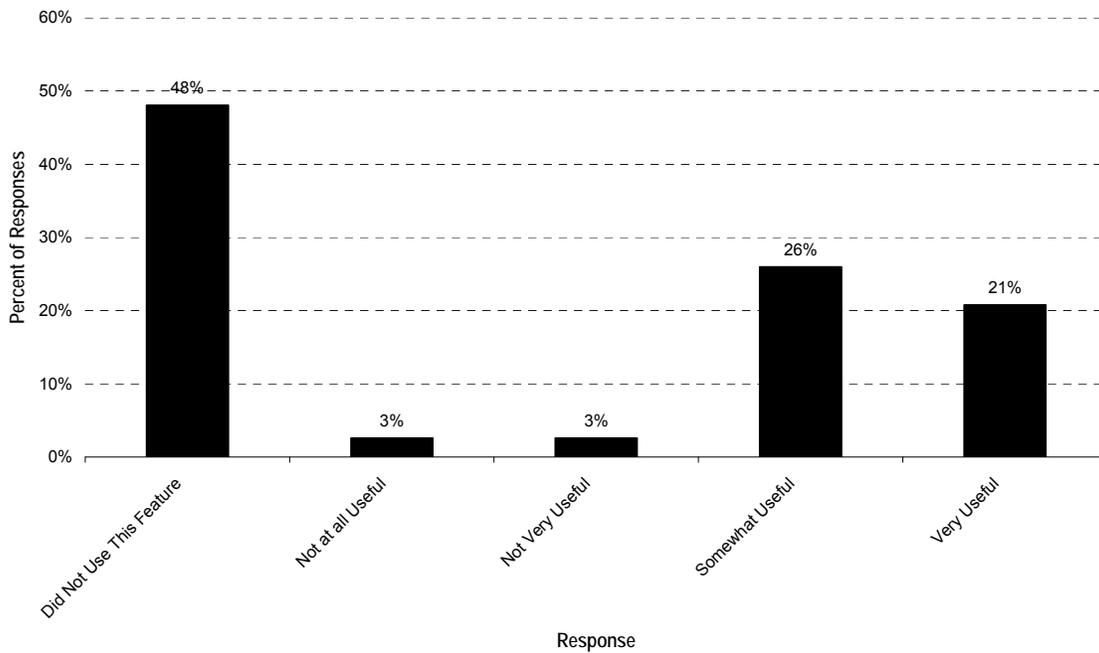
How useful was the following source of information on the METRO website?  
 "How To Ride Information"



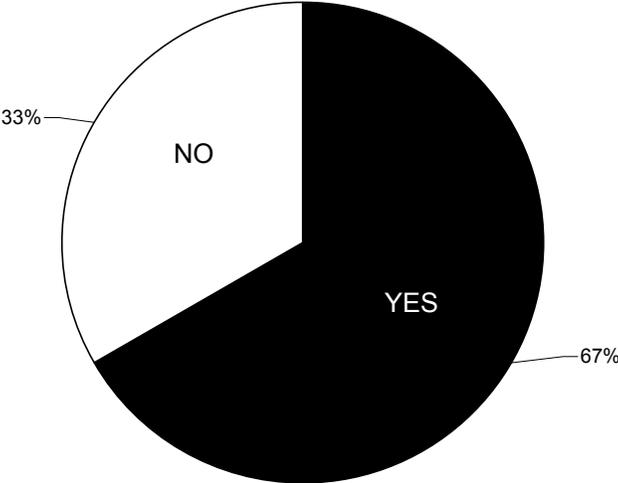
How useful was the following source of information on the METRO website?  
"Fares Information"



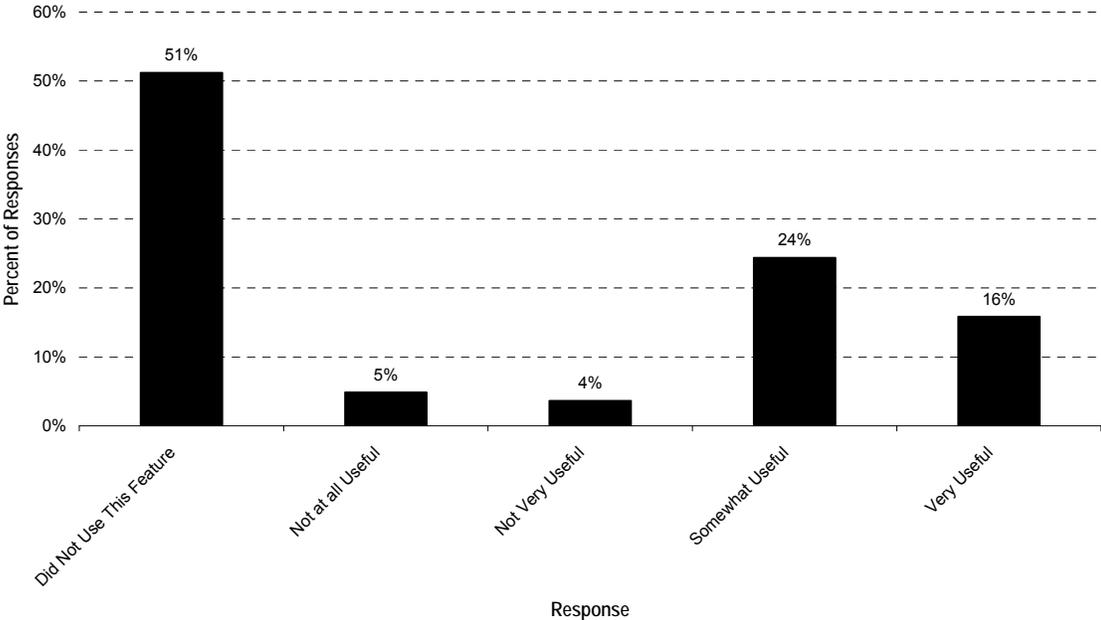
How useful was the following source of information on the METRO website?  
"METRO News"



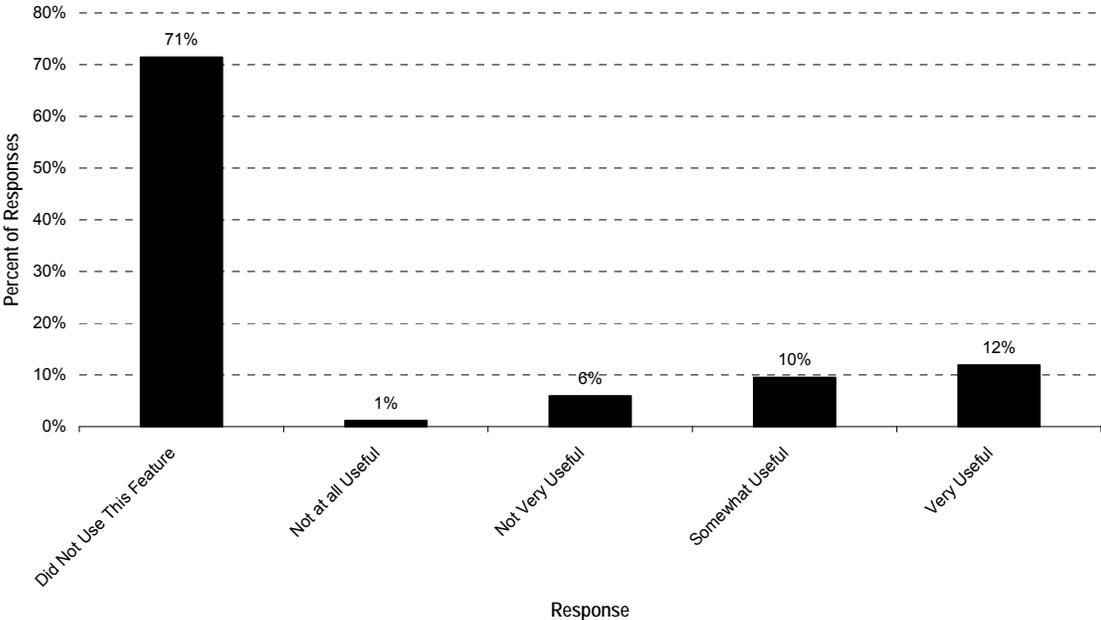
If you've never ridden a METRO bus, does the presence of METRO information on the web increase the likelihood that you will ride METRO buses?



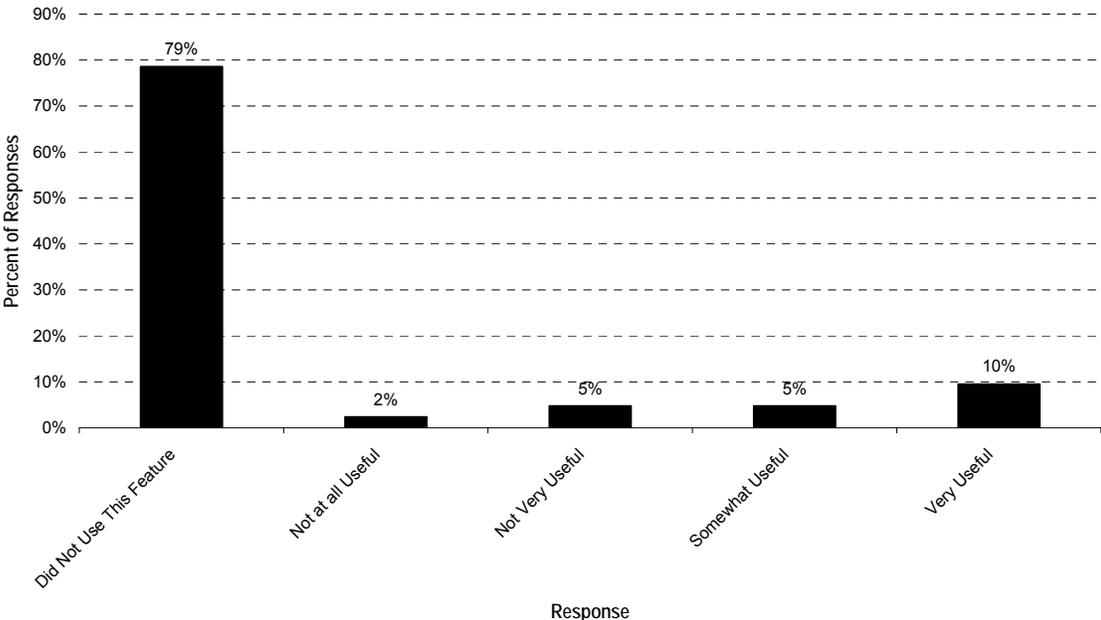
How useful did you find the following source of information not relating to bus service on the METRO website?  
"Tell Us Customer Service Report"



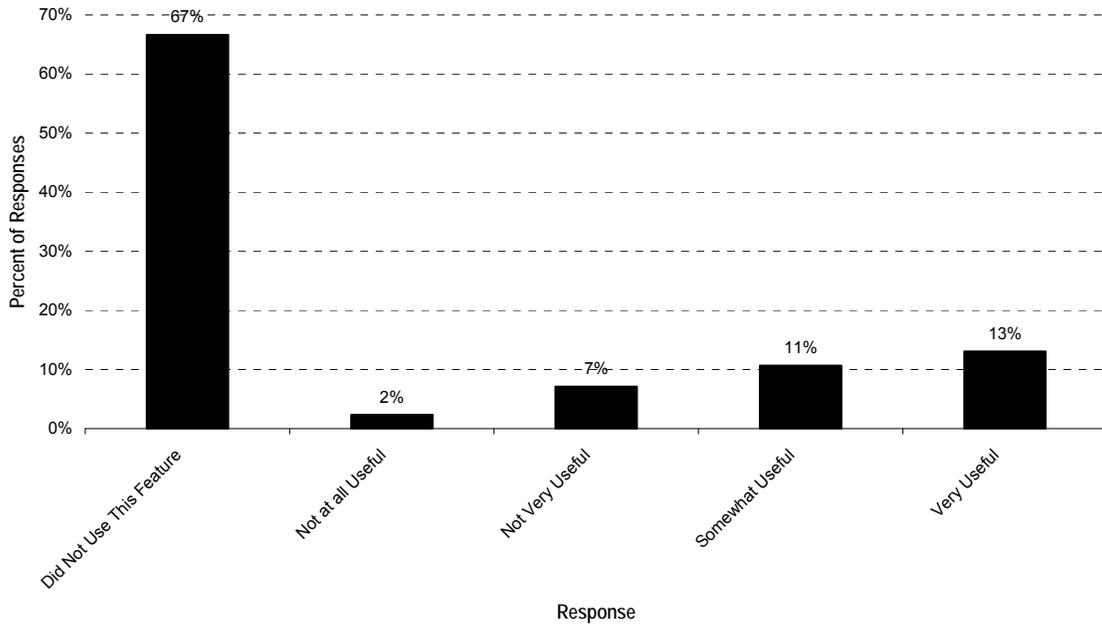
**How useful did you find the following source of information not relating to bus service on the METRO website?  
"Jobs Page"**



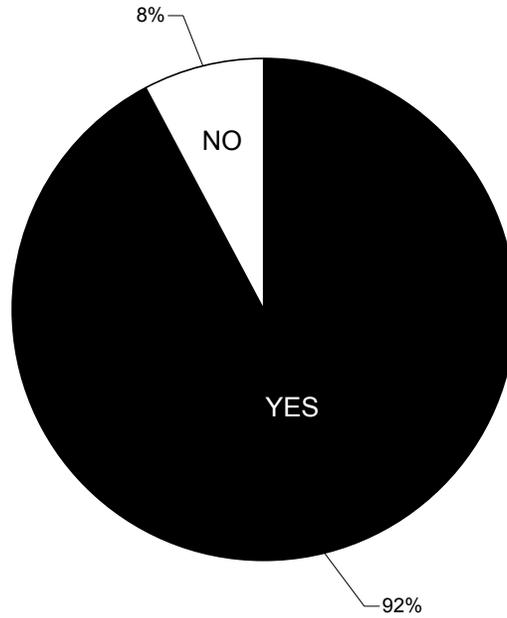
**How useful did you find the following source of information not relating to bus service on the METRO website?  
"Bid Page"**



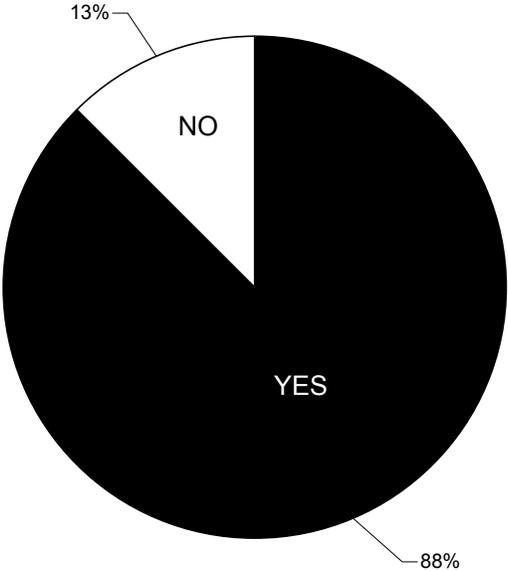
How useful did you find the following source of information not relating to bus service on the METRO website?  
"Board Minutes"



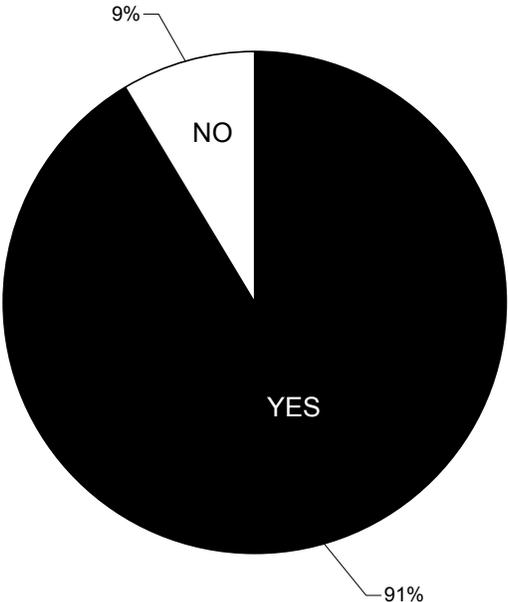
Do you plan to visit the METRO web site again?

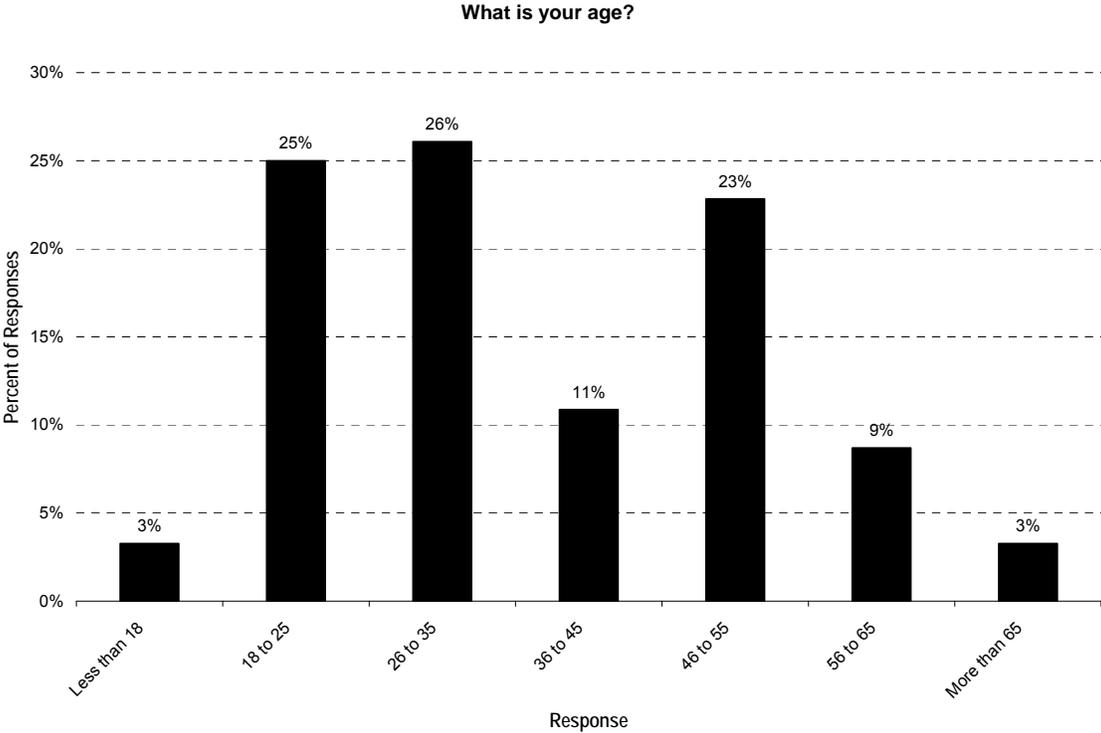
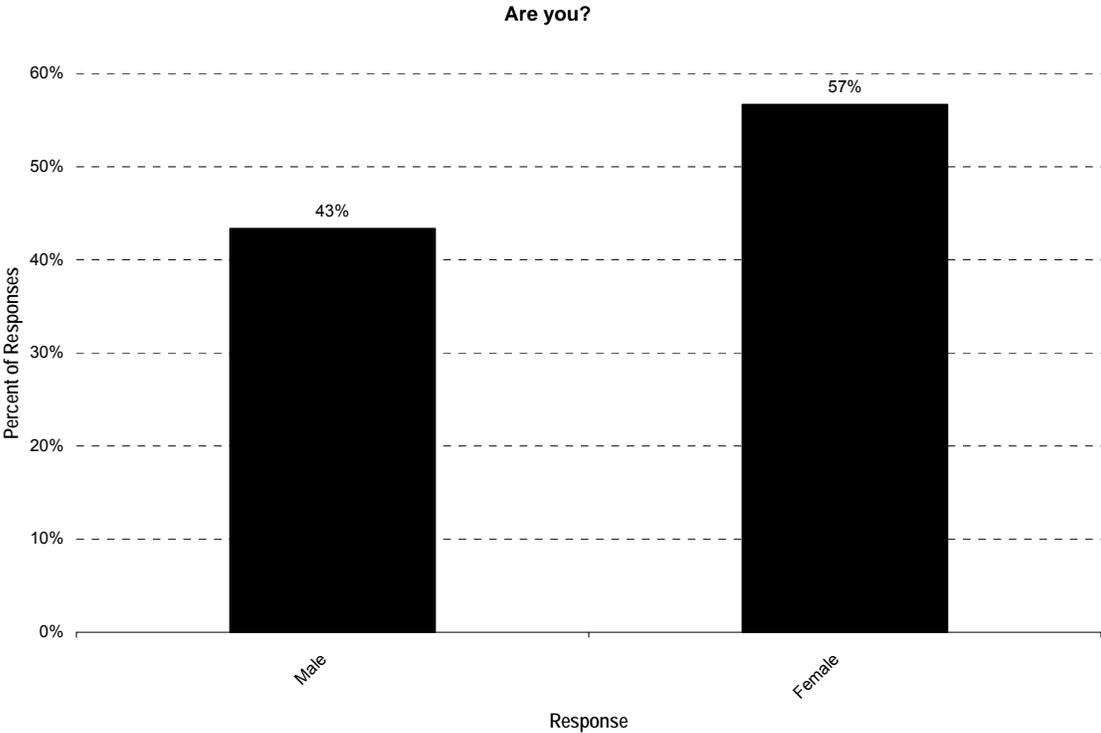


At work or school, do you have access to a computer linked to the internet?

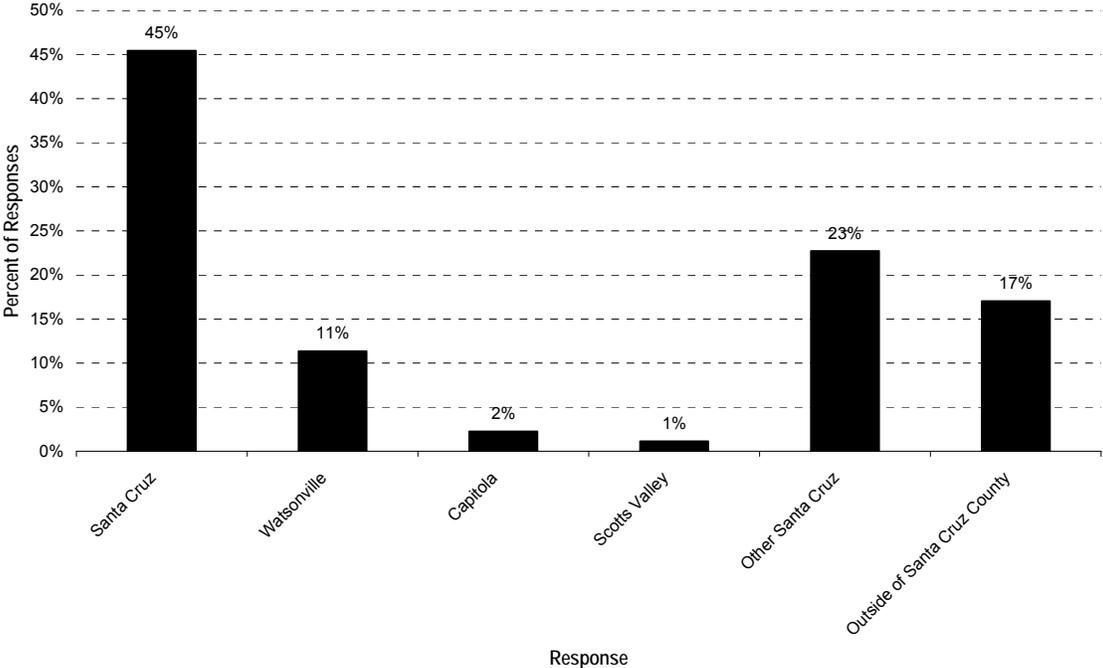


At home, do you have access to a computer linked to the internet?





Where do you live?



## EXAMPLE WEBSITES

There are a number of transit websites that have developed pages that achieve many of the recommendations listed above for METRO. The FTA and METRO magazine both have programs that recognize best examples of transit websites. These site can be used a model for METRO in updating/developing their current site.

Santa Monica Big Blue Bus

[www.bigbluebus.com](http://www.bigbluebus.com)

Portland Streetcar

[www.portlandstreetcar.org](http://www.portlandstreetcar.org)

Santa Clara Valley Transportation Authority (VTA)

[www.vta.org](http://www.vta.org)

San Francisco Municipal Railways (MUNI)

[www.sfmuni.com](http://www.sfmuni.com)

Omnitrans (San Bernardino County Transit)

[www.omnitrans.org](http://www.omnitrans.org)

Massachusetts Bay Transportation Authority

[www.mbta.com](http://www.mbta.com)

# big blue bus

The Smart Commute

HOME
BUS ROUTES
SYSTEM MAP
FARES
RIDER INFO
PLACES TO GO
NEWS & NOTICES

ABOUT US
CONTACT US
LITTLE BLUE CARD
BIG BLUE BUS NEWS
TIDE SHUTTLE

Customer Service

1660 7th Street  
Santa Monica, CA  
90401

Questions? Call Us  
310 451-5444

Monday - Friday  
8:00am-5:00pm

## Change is stressful.

Click here for more information or call 310-451-5444.

City of Santa Monica

Click here for the City of Santa Monica homepage and Big Blue Bus job opportunities

**System Map**

**Bus Routes**

### Welcome Aboard!

---

#### Notices

Tuesday, March 13th: Rimpau Transit Center Back in Service

The Rimpau Transit Center was closed temporarily for maintenance on Tuesday, March 13, but is now reopened. Big Blue Bus Lines 5, 7, Super 7, 12 and 1...

February 4th: Big Blue Bus Begins New Service Improvements!

For our riders' convenience, we're adding new stops, new schedule improvements and a new Santa Monica College Commuter route. Highlights are...

February 5th: Big Blue Bus Launches New SMC/Palms/Mar Vista Commuter Line!

Thanks to help from Santa Monica College, the Big Blue Bus is now providing two ways for SMC students and employees to get to campus **at no cost!** N...

Return of the Tide Shuttle!

As of December 31, 2006, a new and improved Tide Shuttle began service. The Tide Shuttle will run through the month of June, 2007 with the same fare ...

[more notices](#)

---

#### News

Santa Monica Daily Press - 2/26/07

**Taking an Even Easier Ride on the Big Blue Bus**  
By Kristin Mayer  
Santa Monica, see the future of mass transit...

[more news](#)

ride the tide

Reduced Fare Program Application

M Metro

Trip Planner

### Getaways!

MISSION SAN JUAN CADISTRAND - Sunday, March 18, 2007

CARLSBAD FLOWER FIELDS AND BLUEGRASS FESTIVAL - Saturday, April 14, 2007

read more

Bike Racks  
-English-  
-Español-

Press Releases

Find out what's going on with the Big Blue Bus

### Real-Time Parking Availability

How To Get There

- [Public Service Buildings](#)
- [Tourist & Recreational Attractions](#)
- [Airports, Bus & Rail](#)
- [Parks & Pools](#)
- [Schools & Colleges](#)
- [Hospitals & Medical](#)
- [Commercial & Shopping Centers](#)

Mailing List

Please enter your email address if you would like to receive information and updates about:

- Getaways
- Service Updates, News and Notices
- Big Blue Bus News

Email:

[sign up now](#)

Transit Links

- [LA MTA](#)
- [Culver CityBus](#)

Customer Service: 310 451-5444 • 1660 7th Street • Santa Monica, California

This site is optimized for use with Microsoft Internet Explorer version 4.0 or newer.

Website Developed by [VISION INTERNET](#).



**Portland Streetcar**

Arrival Times

Map

Schedule

Contact



- [Home](#)
- [Riding The Streetcar](#)
- [Construction](#)
- [Future Planning](#)
- [Streetcar History](#)
- [Community Impact](#)
- [Citizens Advisory Comm.](#)
- [Sponsorship Page](#)
- [Accessibility News](#)
- [Transportation Links](#)

Mar 16th - 9:55 am

**Schedule**

5:30am to 11:30pm Mon-Thu  
5:30am to 12:00am Friday  
7:15am to 11:45pm Saturday  
7:15am to 10:30pm Sunday

[Click here for Printable 7-Stop Schedule](#)

**Arrival Times**



[View Real-Time Arrivals >](#)

**How To Ride**



Answers to frequently asked questions about riding the streetcar

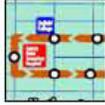
[GO](#)

**Ride & Dine**

Ride the Portland Streetcar for an easy walk to your favorite restaurant.



**Streetcar Map**



[Click here](#) for enlarged printable streetcar map.

**Stop & Shop**

Ride the Portland Streetcar for an easy walk to your favorite business.



**Rider Alerts**

**STREETCAR ACCEPTS TRAM ANNUAL PASS**  
STREETCAR WILL ACCEPT AS A VALID FARE THE PORTLAND AERIAL TRAM ANNUAL PASS.

THE TRAM WILL ACCEPT THE STREETCAR ANNUAL PASS AS A VALID FARE ON THE TRAM.

**STREETCAR LOWERS FARES**  
AS OF JANUARY 1, 2007 TRIMET AND STREETCAR FARES WILL BE VALID ALL DAY ON STREETCAR.

TICKETS PURCHASED ON STREETCAR WILL BE VALID FOR TWO (2) HOURS ON TRIMET BUS AND MAX.

AS OF JANUARY 1, 2007, STREETCAR ONLY ANNUAL PASS WILL COST \$100.00.

THANK YOU FOR RIDING THE PORTLAND STREETCAR!

**Mailing List**



[Click Here](#)




[Arrival Times](#) | [Streetcar Map](#) | [Streetcar Schedule](#) | [Contact](#) | [Citizen's Advisory Committee](#) | [Construction Updates](#) | [Current News](#)

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**Santa Clara Valley Transportation Authority**

Schedules, Maps & Fares | Accessibility Information

**Welcome Aboard** | Select a language | Translation Feedback

Last Update: March 12, 2007

**Look What's New!**

**Say goodbye to stressful driving. Start a new relationship with VTA.**

View VTA's New Commercial (window media) (MP4)

VTA's new Excursion Pass

Take VTA to Fun!

- Community Provides Input on New South County Bus Service (Español)
- Santa Clara Light Rail Station Closing for Renovations on January 2, 2007
- 111 Take TransitSM Trip Planner
- VTA Brochures and Publications (Text Version)
- Short Range Transit Plan (SRTP) (PDF 4.17 MB)
- VTA's Welcome Aboard Pass Program - Free Flash Pass for New Employees!

**Events**

VTA Board of Directors Meeting

- March 1, 2007 - 5:30 PM

VTA Board of Directors Workshop Meeting

- February 16, 2007 - 9:00 AM

VTA 2000 MEASURE A REVENUE AND EXPENDITURE PLAN

Click here to view the VTA 2000 Measure A Revenue and Expenditure Plan that was approved at the June 15, 2006 Board of Directors' Special Meeting.

VTA Public Meetings-at-a-Glance Schedule for all

- VTA March 2007 Meetings

**News**

- VTA Board Awards SR 152-156 Construction Contract
- VTA's Winchester Light Rail Line Resumes Normal Schedule
- VTA Board Joined By Several New Members
- VTA Schedules Public Meetings for BART to Silicon Valley Draft Supplemental EIR
- VTA Hosts Capitol Expressway Light Rail Project Community Meeting (Español)
- VTA To Receive CTC Funding for BART to Silicon Valley
- Public Input Sought on South County Community Bus Service
- Key Downtown San Jose Light Rail Station Closes for Renovations

More News

**Bus Re-Routes**

**Construction Updates**

Light Rail Platform Retrofit Construction Update

SR87 (North) HOV Lane Project Construction Update

**Service Changes/Fares**

Home | Schedules, Maps & Fares | Services & Programs | Studies & Projects | News & Events | Jobs at VTA | Inside VTA Stories | Procurement | Board & Committees | Customer Service | Site Map | FAQ | Tell Us...

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# transit



SFMTA home > **Transit**

Welcome to **San Francisco Municipal Railway (Muni)**. Founded in 1912, the Muni is one of America's oldest public transit agencies and today carries **over 200 million riders** per year. Muni provides transit service within the city and county of San Francisco **24 hours a day, 7 days a week**. Operating Historic streetcars, modern light rail vehicles, diesel buses, alternative fuel vehicles, electric trolley coaches and the world famous **cable cars**, Muni's fleet is among the most diverse in the world.

If you're new to our system, you might want to begin with our [new riders info](#).



[Updates](#) [Routes & Schedules](#) [Maps](#) [Fares & Sales](#) [Rider Info](#) [Projects & Planning](#) [Contact Transit](#)

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[About sfmta.com](#) [Contact Us](#) [415.673.Muni](#) [511 Transit](#) [SF City & County website](#)

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| text only | en español | contact us | site map | search:  go

**omni**  
OMNITRANS

Routes & Schedules | Fares | How to Ride | News | About Omnitrans

Jobs @ Omnitrans | Purchase a Bus Pass

Select a route... go

Plan your Trip...

**Omni says: Ride MORE spend LESS**

**Omni Says Ride with us!**

**Breaking News: Omnitrans fare and service changes approved.**  
To read the complete press release and preview the fare and schedule changes that will go into effect this later this year.  
Read more about fare and service schedule changes...

**Looked at an Omnitrans bus book lately? Tell us about it! Take our 2007 Bus Book Survey and you will be entered into a weekly drawing to win a free 7 Day Pass!**  
Each week Omnitrans will draw a winner from those who completed the survey. That means by participating you have 8 chances to win a week of free rides with Omnitrans.  
Click here to take the 2007 Omnitrans Bus Book Survey...

**New to the Omnitrans bus system? Start by checking out our latest bus book online!**  
Here you can plan trip, print the entire bus book or just the schedules you need. And once you are ready to ride, visit the Omnistore where you can purchase a bus pass online and have it delivered to your doorstep. Riding the bus has never been easier!

- Plan your trip online...
- View or download the January Bus Book...
- View Route Schedules...
- Visit the Omnistore...

**Omnitrans Wins Ad Award**  
APTA awarded the "Omni Says" ad First Place in the 2005 Ad/Wheel radio competition.  
Learn More...

**Omnitrans Wins Web Award**  
The Federal Transit Administration (FTA) selected Omnitrans as one of the top four transit web sites in the nation.  
Full Story...

**Access Transportation Service**  
Access is a service designed to meet the requirements of the Americans with Disabilities Act (ADA). With our new fleet of buses and curb-to-curb service, Access is meeting the transportation demands of persons with disabilities in the San Bernardino Valley. For more information about our Access service and how to ride, click here.

**News**

**Omnitrans Fare and Service Changes Approved**  
Service changes are set for May 7, while fare changes take effect July 1.  
Full Story...

**Get the Latest Scoop**  
The February/March Directions newsletter is now available online.  
Read the latest newsletters...

**Get a Free Ride on Your Birthday**  
Who said no one rides for free? Fill out our form and we'll send you a free Omnitrans day pass on your birthday.\*  
- Sign up online...  
- Read more about it... (3MB pdf)

**Purchase Your Passes Online**  
Buy your bus passes from our website with your Visa or Mastercard. Purchase a bus pass now...

**Rider Alerts Online**  
Want to know if there's a delay, change, or alert for your bus route? Check the Rider Alert page...

**Omnitrans Open RFPs**  
See the current procurement listings...

**Omnitrans Auction Items**  
Occasionally, Omnitrans sells surplus or used items by public auction.  
See current auction date and items...

**Sign up for OmniNow e-mail updates for this page.**  
Learn more about OmniNow...

routes & schedules	fares	how to ride	news	about Omnitrans
contact us	site map	en español	text-only	
privacy policy	copyright			

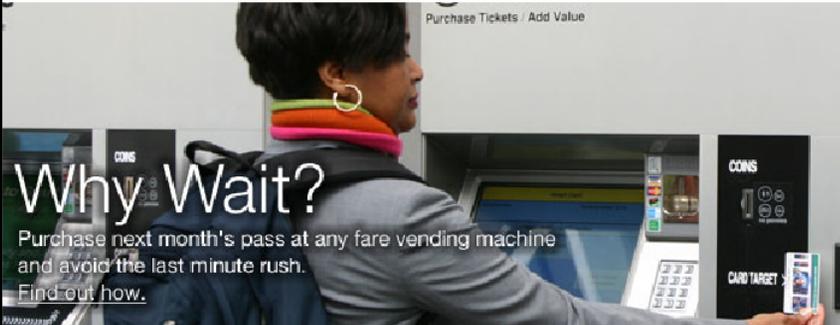
**508 Bobby APPROVED**

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**30** Wednesday  
May 2007

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Needham	

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When: Depart at  : PM on

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# APPENDIX D: OUTREACH RESULTS

## STAKEHOLDER INTERVIEWS

The WSA team conducted the majority of stakeholder interviews during the 2nd week of January, 2007. Follow up interviews with remaining stakeholders were conducted in February and March 2007. These interviews were conducted with a number of stakeholder including elected officials, regional and community agencies, local business community, educational institutions, and MAC members. Table A-1 shows the stakeholders who were identified by METRO and were available to be interviewed as part of this outreach effort. Our understanding with each of the stakeholders interviewed was that their individual responses would be confidential, but that we would include all of the important comments as part of an overall evaluation.

**Table A-1: Interviewed Stakeholders**

Organization	Name	Title
City of Santa Cruz	Mark Dettle	Public Works Director
City of Santa Cruz	Jim Burr	Transportation Manager
City of Santa Cruz	Matt Farrell	Parking Program Manager
City of Santa Cruz	Emily Reilly	Mayor, METRO Board Member & BRT Committee
City of Watsonville	Marcela Tavantzis	Assistant City Manager, METRO Board
City of Capitola	Steve Jesberg	Public Works Director
City of Capitola	Michael Termini	Mayor
City of Scotts Valley	Ken Anderson	Public Work Director
UCSC	Larry Pageler	Co-Director, TAPS
UCSC	Donna Blitzer	Director, Government & Community Relations Appointed Ex-Officio on METRO Board
Cabrillo College	Manuel Osorio	Vice President, Student Services
Cabrillo College	Brian King	President
SCCRTC	George Dondero	Executive Director
AMBAG	Todd Muck	Planner
TMA	Ginny Johnson	TMA Board of Directors
Santa Cruz Chamber of Commerce	Bill Tysseling	Executive Director
MAC	Naomi Gunther	Board Member, appointed
MAC	Paul Marcelin-Sampson	Board Member, appointed
TFTF	Fred Keeley	Facilitator
Seaside	Joann Dlott	Ocean Beach Developer (Parking Lots)

## Survey Results

The results of the stakeholder interviews were recorded and organized into the four general categories, as presented below.

### Extended/Long Distance Service

Highway 17 service is particularly well received and viewed as an important component of the METRO family of services. There was some discussion regarding improved connections to access the San Jose

airport. Long distance service to Watsonville is viewed in general as a good connection, but one with some opportunity for reduced travel time. Other comments included extending the span of service. There was some discussion regarding service connections with Scotts Valley and the new Cabrillo College campus.

### **Santa Cruz Community**

The perception is that most of the service goes to the METRO Center and then to the University. There was some discussion that maybe there were broader community needs which could be met through transit. These include transportation for the tourists and beach goers in the summer, and service workers.

### **Other Community**

Interest was expressed for more community based services within Watsonville, Capitola, and Scotts Valley. There was discussion regarding additional access to Cabrillo College on all of its campuses and connections between Cabrillo and the University.

### **General Community Issues**

Traffic congestion and sustainable financing were the two major points of discussion. There is some perception that METRO has a steady source of revenue through the sales tax and that the Board decision on the labor contract last year has put the agency in some jeopardy in the future. There is some perception that the METRO staff is spread too thin, with not much time available for planning and outreach. In general, there was a perception that METRO does not do much in the way of advertising or marketing and therefore not looking to service new potential markets.

In general, there seems to be a potential for METRO to get more involved in regional issues and discussions. There was a desire expressed from many sides to have METRO be a participant in some of the regional conversations.

# ON BOARD SURVEY RESULTS

Figure B-1: Survey Form



**METRO**

## RIDERSHIP SURVEY

Santa Cruz METRO is conducting a survey to help improve travel in and around the county. All your supplies are completely confidential. Thank you for your help in responding to this survey.

Please return completed questionnaire to surveyor or leave on your seat.

<p><b>Your Trip</b></p> <p>1. Where did you come from on this trip? (check the best answer)</p> <p> <input type="checkbox"/> Home                      <input type="checkbox"/> Visiting friends/family  <input type="checkbox"/> Work                        <input type="checkbox"/> Medical Appointment  <input type="checkbox"/> School                      <input type="checkbox"/> Personal Business  <input type="checkbox"/> Shopping                  <input type="checkbox"/> Leisure/Entertainment  <input type="checkbox"/> Other _____ (specify)                 </p> <p>2. What is the nearest known street, intersection, city and zip code for your starting point?</p> <p style="text-align: center;">_____ &amp; _____ Primary Street                      Cross Street</p> <p>City: _____ Zip Code: _____</p>	<p>8. For what purposes do you most often use Metro?</p> <p> <input type="checkbox"/> Work                      <input type="checkbox"/> Visiting friends/family  <input type="checkbox"/> School                    <input type="checkbox"/> Medical Appointments  <input type="checkbox"/> Shopping                <input type="checkbox"/> Personal Business  <input type="checkbox"/> Other                      <input type="checkbox"/> Leisure/Entertainment  <input type="checkbox"/> _____ (specify)                 </p> <p>9. Do you own a Vehicle?</p> <p><input type="checkbox"/> Yes                      <input type="checkbox"/> No</p> <p>9 a. Do you have access to a vehicle (e.g. carshare/rental, can borrow a car, etc.)</p> <p><input type="checkbox"/> Yes                      <input type="checkbox"/> No</p> <p>Explain _____</p>
<p><b>Origin</b></p> <p>3. How did you get from your starting point to the bus you boarded?</p> <p> <input type="checkbox"/> Walked _____ # blocks    <input type="checkbox"/> Dropped Off  <input type="checkbox"/> Drove                              <input type="checkbox"/> Taxi  <input type="checkbox"/> Bike                                <input type="checkbox"/> Transferred from Bus                      Metro Route # and Name: _____                 </p>	<p><b>Your Opinions</b></p> <p>10. In general how satisfied are you with Metro? 1 = unsatisfied 5 = very satisfied</p> <p>On-time arrivals _____ Service frequency _____                      Bus information _____ Courtesy of drivers _____                      Seat availability _____ Customer service _____                      Bus maintenance _____ Bus cleanliness _____</p>
<p><b>Destination</b></p> <p>4. Where are you going on this trip?</p> <p> <input type="checkbox"/> Home                      <input type="checkbox"/> Visiting friends/family  <input type="checkbox"/> Work                        <input type="checkbox"/> Medical Appointment  <input type="checkbox"/> School                      <input type="checkbox"/> Personal Business  <input type="checkbox"/> Shopping                  <input type="checkbox"/> Leisure/Entertainment  <input type="checkbox"/> Other _____ (specify)                 </p> <p>2. What is the nearest known street, intersection, city and zip code for your ending point?</p> <p style="text-align: center;">_____ &amp; _____ Primary Street                      Cross Street</p> <p>City: _____ Zip Code: _____</p>	<p>11. How Can METRO Improve?</p>
<p>5. How will you get to your destination from this bus?</p> <p> <input type="checkbox"/> Walk _____ # blocks    <input type="checkbox"/> Transfer to Metro Route  <input type="checkbox"/> Drive _____ # _____  <input type="checkbox"/> Drive                              <input type="checkbox"/> Be picked up by someone  <input type="checkbox"/> Bike                                <input type="checkbox"/> Other _____                 </p> <p>6. Please fill in number of days you take METRO.</p> <p> <input type="checkbox"/> I typically ride METRO _____ days per week  <input type="checkbox"/> I typically ride METRO _____ days per month  <input type="checkbox"/> I typically ride METRO _____ days per year  <input type="checkbox"/> I do not regularly ride METRO.                 </p> <p>7. How did you pay for your ride today?</p> <p> <input type="checkbox"/> Monthly Pass    <input type="checkbox"/> Cash \$ _____  <input type="checkbox"/> Day Pass            <input type="checkbox"/> 5-Day Pass  <input type="checkbox"/> UC Pass              <input type="checkbox"/> Cabrillo Pass  <input type="checkbox"/> Discount            <input type="checkbox"/> Other _____                 </p> <p><b>Survey continued above...</b></p>	<p><b>About You</b></p> <p>12. Please indicate your gender</p> <p><input type="checkbox"/> Male                      <input type="checkbox"/> Female</p> <p>12a. Please indicate your age: _____</p> <p>13. Which of the following best describes your employment status?</p> <p> <input type="checkbox"/> Employed full-time            <input type="checkbox"/> Full-time student  <input type="checkbox"/> Employed part-time           <input type="checkbox"/> Part-time student  <input type="checkbox"/> Retired                          <input type="checkbox"/> College <input type="checkbox"/> High School  <input type="checkbox"/> Not employed                  _____ (school)                 </p> <p>14. What was your total annual household income before taxes in 2006?</p> <p> <input type="checkbox"/> Under \$10,000                <input type="checkbox"/> \$40,000-\$49,999  <input type="checkbox"/> \$10,000-\$19,999            <input type="checkbox"/> \$50,000-\$59,999  <input type="checkbox"/> \$20,000-\$29,999            <input type="checkbox"/> \$60,000-\$74,999  <input type="checkbox"/> \$30,000-\$39,999            <input type="checkbox"/> \$75,000 or more                 </p>



**ENCUESTA DE PASAJEROS**

Santa Cruz METRO esta conduciendo una encuesta para mejorar el servicio de transito dentro y alrededor del condado. Todas sus respuestas seran confidenciales. Gracias por su ayuda en completar este cuestionario.

Favor de regresar su cuestionario completo al encuestador o poner sobre su asiento.

<p><b>Su Viaje</b></p> <p>1. ¿Donde se encontraba antes de llegar a esta parada de autobús? (indique la mejor respuesta)</p> <p><input type="checkbox"/> Casa      <input type="checkbox"/> Visitando amigos/familiares</p> <p><input type="checkbox"/> Trabajo      <input type="checkbox"/> Cita con el doctor</p> <p><input type="checkbox"/> Escuela      <input type="checkbox"/> Asunto personal</p> <p><input type="checkbox"/> De compras      <input type="checkbox"/> Ocio/Diversión</p> <p><input type="checkbox"/> Otra razon _____ (especifique)</p>	<p>8. ¿Por qué razón usa usted Metro mas frecuentemente?</p> <p><input type="checkbox"/> Regresar a Casa      <input type="checkbox"/> Visitar amigos/familiares</p> <p><input type="checkbox"/> Trabajo      <input type="checkbox"/> Citas con el doctor</p> <p><input type="checkbox"/> Escuela      <input type="checkbox"/> Asuntos personales</p> <p><input type="checkbox"/> Ir de compras      <input type="checkbox"/> Ocio/Diversión</p> <p><input type="checkbox"/> Otra razon _____ (especifique)</p>
<p>2. ¿Cual es la dirección o calle mas cercana a su punto de origen?</p> <p>_____ &amp; _____</p> <p>Calle Principal      Calle Principal</p> <p>Ciudad: _____ Codigo Postal: _____</p>	<p>9. ¿Tiene usted automóvil propio?</p> <p><input type="checkbox"/> Si      <input type="checkbox"/> No</p> <p>9a. ¿Tiene usted acceso a un automóvil (e.g. carshare, lo puede rentar, lo puede pedir prestado, etc.)?</p> <p><input type="checkbox"/> Si      <input type="checkbox"/> No</p> <p>Explique _____</p>
<p><b>Origen</b></p> <p>3. ¿Como llego de su punto de origen á la parada donde abordo el autobus?</p> <p><input type="checkbox"/> Camino      <input type="checkbox"/> Fue dejado por alguien</p> <p>_____ # de cuádras      <input type="checkbox"/> Taxi</p> <p><input type="checkbox"/> Manejo      <input type="checkbox"/> Uso bicicleta</p> <p><input type="checkbox"/> Transbordo líneas de autobús</p> <p>Numero y Nombre de Ruta: _____</p>	<p><b>Sus Opiniones</b></p> <p>10. ¿En general, que tan satisfecho(a) esta usted con METRO con respecto a lo siguiente?</p> <p>1= satisfecho 5= no satisfecho</p> <p>Horarios puntuales _____ Frecuencia de servicio _____</p> <p>Conveniencia de horarios _____</p> <p>Asientos disponibles _____ Mantenimiento de buses _____</p> <p>Cortesía de conductores _____</p>
<p><b>Destinación</b></p> <p>4. ¿Hacia donde se dirige en este viaje?</p> <p><input type="checkbox"/> Su Casa      <input type="checkbox"/> Visitando amigos/familiares</p> <p><input type="checkbox"/> Trabajo      <input type="checkbox"/> Cita con el doctor</p> <p><input type="checkbox"/> Escuela      <input type="checkbox"/> Asunto personal</p> <p><input type="checkbox"/> De compras      <input type="checkbox"/> Ocio/Diversión</p> <p><input type="checkbox"/> Otro lado _____ (especifique)</p>	<p>11. ¿Como puede METRO mejorar su servicio?</p>
<p>4a. ¿Cual es la dirección o calle mas cercana a su destinación?</p> <p>_____ &amp; _____</p> <p>Calle Principal      Calle Principal</p> <p>Ciudad: _____ Codigo Postal: _____</p>	
<p>5. ¿Como llegara del autobus a su destinación?</p> <p><input type="checkbox"/> Caminara      <input type="checkbox"/> Transbordara buses</p> <p><input type="checkbox"/> Manejara      <input type="checkbox"/> Alguien lo/la recojera</p> <p><input type="checkbox"/> Por bicicleta      <input type="checkbox"/> Otra manera</p> <p>_____ (especifique)</p>	<p><b>Sobre Usted</b></p> <p>12. Favor de indicar su género</p> <p><input type="checkbox"/> Masculino      <input type="checkbox"/> Femenino</p> <p>12a. Indique su edad: _____</p>
<p>6. ¿Cuantos días a la semana transita usted en METRO?</p> <p><input type="checkbox"/> Transito en METRO _____ días por semana</p> <p><input type="checkbox"/> Transito en METRO _____ días al mes.</p> <p><input type="checkbox"/> Transito en METRO _____ días al año.</p> <p><input type="checkbox"/> No transito en METRO regularmente.</p> <p>7. ¿Como pago por este viaje en autobús?</p> <p><input type="checkbox"/> Boleto prepagado - 1 Mes      <input type="checkbox"/> En efectivo</p> <p><input type="checkbox"/> Boleto prepagado - 1 Día      <input type="checkbox"/> Pass de Colegio</p> <p><input type="checkbox"/> Boleto prepagado - 5 Días      <input type="checkbox"/> Pass Universitario</p> <p><input type="checkbox"/> Boleto de descuento      <input type="checkbox"/> Otra manera</p> <p><b>Encuesta continua arriba...</b></p>	<p>13. Describa su estado de empleo:</p> <p><input type="checkbox"/> Empleado tiempo-completo      <input type="checkbox"/> No empleado</p> <p><input type="checkbox"/> Empleado medio-tiempo      <input type="checkbox"/> Jubilado</p> <p><input type="checkbox"/> Estudiante tiempo-completo _____</p> <p>14. ¿Cual fue el estimado del ingreso total de su hogar (en 2006) antes de impuestos?</p> <p><input type="checkbox"/> Menos de \$10,000      <input type="checkbox"/> \$40,000-\$49,999</p> <p><input type="checkbox"/> \$10,000-\$19,999      <input type="checkbox"/> \$50,000-\$59,999</p> <p><input type="checkbox"/> \$20,000-\$29,999      <input type="checkbox"/> \$60,000-\$74,999</p> <p><input type="checkbox"/> \$30,000-\$39,999      <input type="checkbox"/> \$75,000 o mas</p>

## Questionnaire Results

### Q1: Where did you come from on this trip?

	# of Responses.	% of Total	% of Responses
Home	769	40.4%	40.8%
Work	286	15.0%	15.2%
School	458	24.1%	24.3%
Shopping	88	4.6%	4.7%
Visiting friends/family	74	3.9%	3.9%
Medical Appointment	74	3.9%	3.9%
Personal Business	41	2.2%	2.2%
Leisure/Entertainment	58	3.0%	3.1%
Other	36	1.9%	1.9%
No Response	18	0.9%	1.0%
Total	1902	100%	100%

### Q2: How did you get from your starting point to the bus you boarded?

	# of Responses	% of Total	% of Responses
Walked	1419	74.6%	77.2%
Drove	68	3.6%	3.7%
Bike	141	7.4%	7.7%
Dropped Off	71	3.7%	3.9%
Taxi	6	0.3%	0.3%
Transferred from Bus	132	6.9%	7.2%
No Response	65	3.4%	3.5%
Total	1902	100.0%	100.0%

Average walking distance is 2.28 blocks

### Q3: Where are you going on this trip?

	# of Responses	% of Total	% of Responses
Home	821	43.2%	44.4%
Work	258	13.6%	14.0%
School	371	19.5%	20.1%
Shopping	73	3.8%	4.0%
Visiting friends/family	72	3.8%	3.9%
Medical Appointment	89	4.7%	4.8%
Personal Business	43	2.3%	2.3%
Leisure/Entertainment	85	4.5%	4.6%
Other	36	1.9%	1.9%
No Response	54	2.8%	2.9%
Total	1902	100.0%	100.0%

**Q4: How will you get to your destination from this bus?**

	# of Responses	% of Total	% of Responses
Walked	1460	76.8%	80.9%
Drive	49	2.6%	2.7%
Bike	112	5.9%	6.2%
Picked up by someone	35	1.8%	1.9%
Transfer to Metro Route	115	6.0%	6.4%
Other	34	1.8%	1.9%
No Response	97	5.1%	5.4%
Total	1902	100.0%	100.0%

Average walking distance is 2.31 blocks

**Q5: How often do you ride the bus?**

	# of Responses	% of Total	% of Responses
7 days a week	251	13.2%	15.3%
6 days a week	187	9.8%	11.4%
5 days a week	505	26.6%	30.8%
4 days a week	209	11.0%	12.7%
3 days a week	163	8.6%	9.9%
2 days a week	107	5.6%	6.5%
1 day a week	54	2.8%	3.3%
1 to 5 days per month	28	1.5%	1.7%
6 to 10 days per month	15	0.8%	0.9%
11 to 15 days per month	12	0.6%	0.7%
16 to 20 days per month	20	1.1%	1.2%
21 to 25 days per month	5	0.3%	0.3%
26 to 31 days per month	12	0.6%	0.7%
1 to 10 days per year	10	0.5%	0.6%
11 to 100 days per year	3	0.2%	0.2%
101 to 200 days per year	4	0.2%	0.2%
201 to 365 days per year	7	0.4%	0.4%
Not a regular rider	48	2.5%	2.9%
No Response	262	13.8%	16.0%
Total	1902		

**Q6: How did you pay for your ride today?**

	# of Responses	% of Total	% of Responses
Monthly Pass	337	17.7%	18.7%
Day Pass	110	5.8%	6.1%
UC Pass	600	31.5%	33.4%
Discount	34	1.8%	1.9%
Cash	473	24.9%	26.3%
5-Day Pass	9	0.5%	0.5%
Cabrillo Pass	199	10.5%	11.1%
Other	36	1.9%	2.0%
No Response	104	5.5%	5.8%
Total	1902	100.0%	100.0%

**Q7: For what purposes do you most often use Metro?**

	# of Responses	% of Total	% of Responses
Work	668	35.1%	36.1%
School	834	43.8%	45.1%
Shopping	119	6.3%	6.4%
Other	87	4.6%	4.7%
Visiting friends/family	34	1.8%	1.8%
Medical Appointment	31	1.6%	1.7%
Personal Business	41	2.2%	2.2%
Leisure/Entertainment	36	1.9%	1.9%
No Response	52	2.7%	2.8%
Total	1902	100.0%	100.0%

**Q8: Do you own a vehicle?**

	# of Responses	% of Total	% of Responses
Yes	587	30.9%	32.1%
No	1239	65.1%	67.9%
No Response	76	4.0%	4.2%
Total	1902	100.0%	100.0%

**Q9: Do you have access to a vehicle?**

	# of Responses	% of Total	% of Responses
Yes	671	35.3%	42.7%
No	901	47.4%	57.3%
No Response	330	17.4%	21.0%
Total	1902	100.0%	100.0%

**Q10: Please indicate your gender**

	# of Responses	% of Total	% of Responses
Male	877	46.1%	48.3%
Female	937	49.3%	51.7%
No Response	88	4.6%	4.9%
Total	1902	100.0%	100.0%

**Q11: What is your age?**

	# of Responses	% of Total	% of Responses
Under 18	151	7.9%	8.8%
18-23	793	41.7%	46.2%
24-35	331	17.4%	19.3%
36-49	205	10.8%	12.0%
50-64	189	9.9%	11.0%
65 and over	46	2.4%	2.7%
No Response	187	9.8%	10.9%
Total	1902	100.0%	100.0%

**Q12: Which best describes your employment status?**

	# of Responses	% of Total	% of Responses
Employed full-time	449	23.6%	25.2%
Employed part-time	525	27.6%	29.4%
Retired	79	4.2%	4.4%
Not employed	206	10.8%	11.5%
Full-time student	378	19.9%	21.2%
Part-time student	39	2.1%	2.2%
College	85	4.5%	4.8%
High School	24	1.3%	1.3%
No Response	117	6.2%	6.6%
Total	1902	100.0%	100.0%

**Q13: What is your yearly household income?**

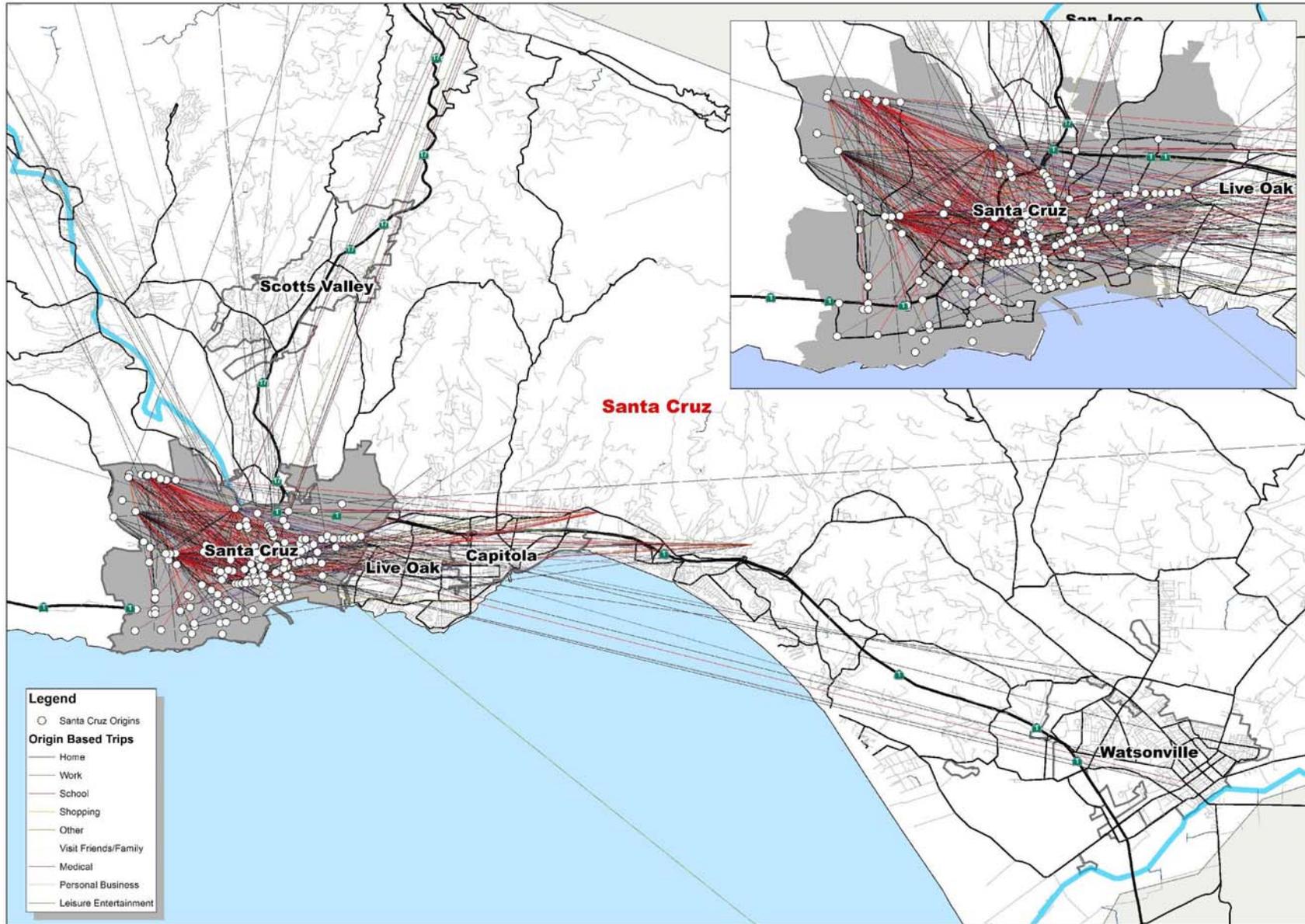
	# of Responses	% of Total	% of Responses
Less than \$10,000	698	36.7%	47.5%
\$10,000 to \$19,999	260	13.7%	17.7%
\$20,000 to \$29,999	131	6.9%	8.9%
\$30,000 to \$39,999	97	5.1%	6.6%
\$40,000 to \$49,999	58	3.0%	3.9%
\$50,000 to \$59,999	60	3.2%	4.1%
\$60,000 to \$74,999	42	2.2%	2.9%
\$75,000 and over	125	6.6%	8.5%
No Response	431	22.7%	29.3%
Total	1902	100.0%	100.0%

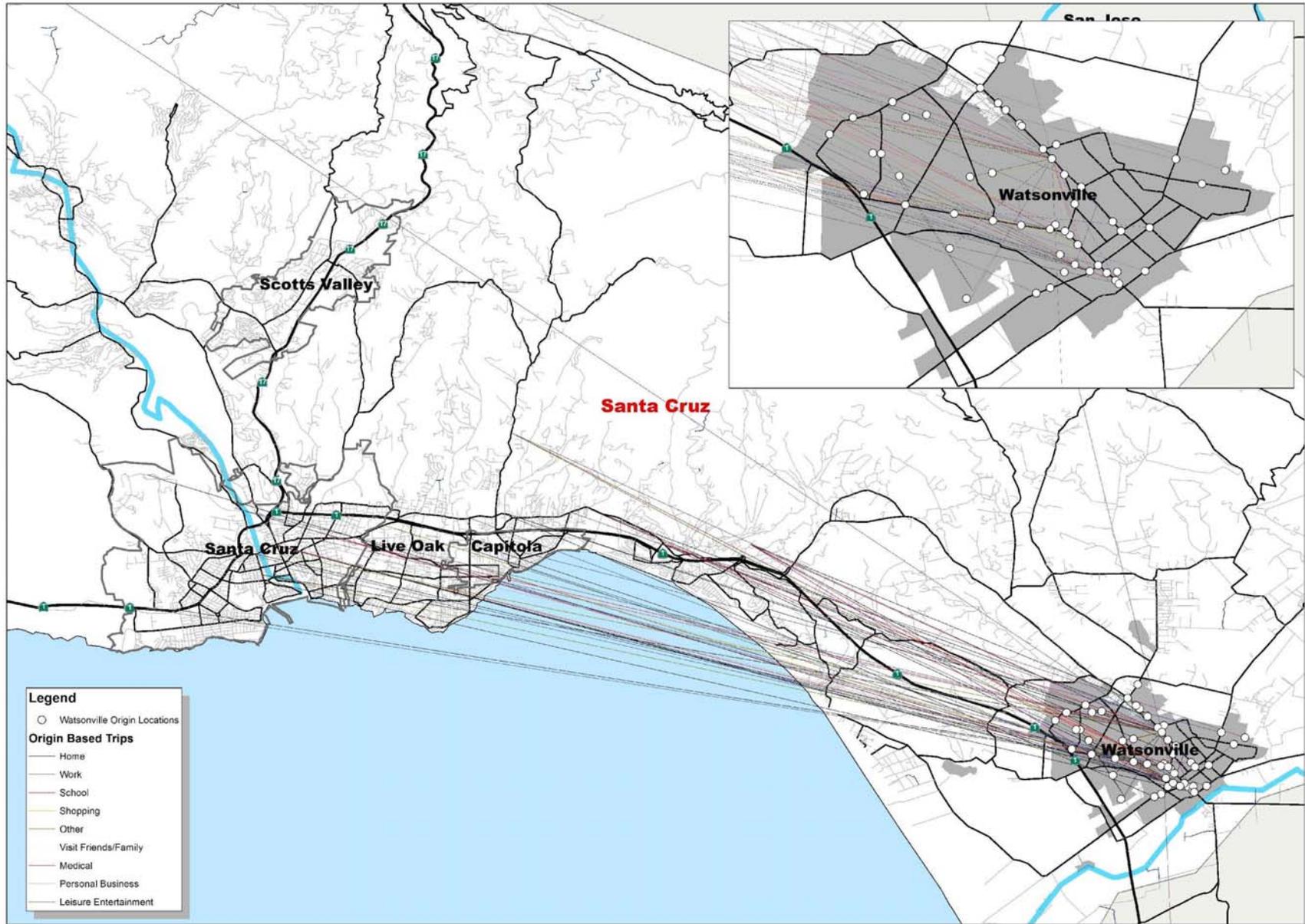
**Q14: How would you rate performance on a scale of 1 (unsatisfied) to 5 (very satisfied)**

	# of Responses	Average Rating*
On time arrivals	1600	3.61
Bus information	1547	4.10
Seat availability	1570	3.72
Bus maintenance	1498	4.17
Service Frequency	1538	3.48
Courtesy of drivers	1533	4.02
Customer service	1417	4.00
Bus cleanliness	1485	4.07

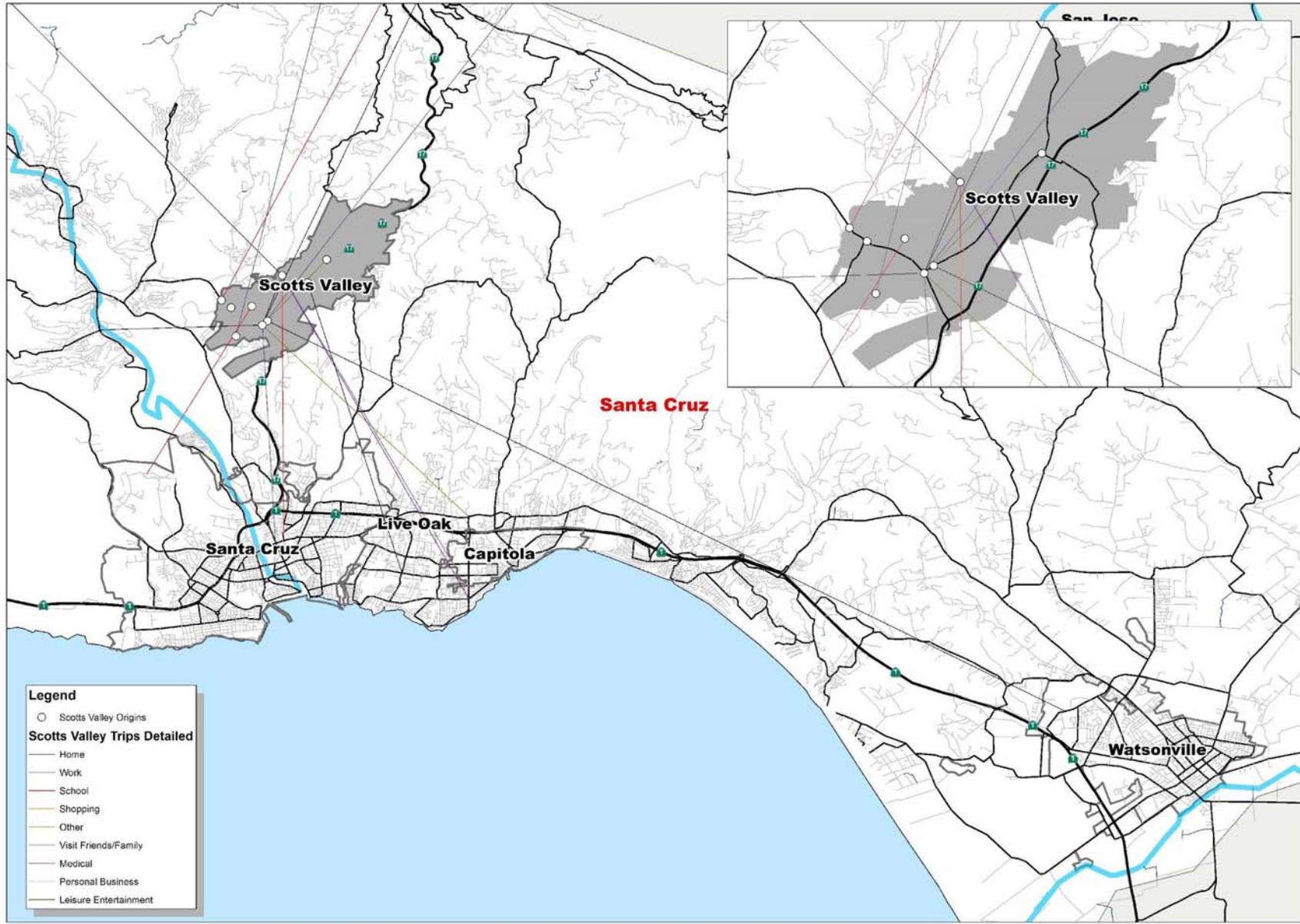
\*1=unsatisfied, 5= very satisfied

**ORIGIN-DESTINATION MAPS (BY ORIGIN LOCATION AND TRIP PURPOSE)**









## **BUS DRIVER INTERVIEWS**

Wilbur Smith Associates met with the METRO bus drivers on May 2, 2007. WSA sent four representatives (two located in the Operation's break room, two located in the METRO Center break room) to sit down with drivers and discuss issues they felt were important to include in the Short Range Transit Plan process. The interviewers were equipped with a questionnaire but the drivers were encouraged to discuss any issues they felt were relative.

Two important ideas were raised:

- An investment by METRO in technology to record and measure performance for services would be beneficial. That way there would be a consistent resource to record information, provide information to customers and measure and monitor performance. Of particular importance is the ability to record on time performance. On time performance of services is affected by increasing congestion on major trunk lines.
- The operators believe that METRO service would be enhanced by regular communication forums being established between planning and operations to discuss route and service opportunities.

## COMMUNITY FOCUS GROUP RESULTS

### Watsonville Focus Group results

As part of the community outreach effort included in the development of the Santa Cruz METRO's 2008-2012 Short Range Transit Plan (SRTP), Wilbur Smith Associates (WSA) conducted a focus groups with non-users of the transit service in the community of Watsonville on Wednesday, May 16 2007. The focus group was held at the La Manzana Community Resources Center, a bilingual, bicultural community resource center serving mostly low-income residents of Watsonville and Pajaro Valley.

The purpose of this focus group was threefold: 1) to identify if the members of the community were aware of METRO service in the City of Watsonville and the surrounding areas, 2) to identify the major reasons why METRO service is not currently used, and 3) to identify what service changes would increase the use of transit. The participants were a representative group of the Watsonville community, comprised of users and non-users, working class and low-income agricultural workers. The participants included the following individuals:

- (2) working class mid to late 20 year old females (former bus riders)
- (1) working class mid 40's female (non-user)
- (1) low-income agricultural worker, mid 30's mother of 4 children (bus rider)
- (1) low-income agricultural worker, late twenties male (occasional bus rider)
- (1) low-income nursery worker, late twenties male (non-user)
- (1) low-income agricultural worker, late 40's male (non-user)

The focus group began with an introduction and presentation by WSA staff person, Elizabeth Cruz, who gave a brief overview of METRO's SRTP and explained why their participation in the process was important. Following the presentation, the group was asked a few preliminary questions to establish their level of familiarity with METRO service in Watsonville. The following sections present the participant's responses to the questions/topics asked:

#### Awareness of METRO Transit Service in Watsonville

In general, participants said they were aware that METRO provided services within the City of Watsonville and to nearby Soquel and Santa Cruz. However, while focus group participants said they were aware METRO serviced these areas they were unclear of how to take the bus to areas they wanted to go. Several participants mentioned that a lack of information was one of the biggest reasons why they did not ride the bus. Notably, they did not know where to seek out bus schedule information as no "headways" were provided at the Watsonville Transit Center.

#### Best Method to Communicate Transit Information

When asked to identify what the best and most efficient way to distribute transit information to them, the responses of participants indicated they preferred to have printed materials made available to them. Several participants said they would like to see schedules and other transit information mailed out to their homes. If flyers or other materials could not be mailed out, interest was expressed in making these printed materials available at key centers of activity such as the METRO Center and the La Manzana Community Resources Center.

### Major Issues Why You Do Not Ride METRO

While participants had individual reasons for not riding METRO, some general themes did emerge during their conversations. The following include the topics identified along with key points expressed:

1. Time schedules are not reliable (non-users or people who stopped riding)
  - You can never be sure what time the bus is going to arrive
  - Buses are consistently late
2. Bus rides are too long (people who stopped riding the riders)
  - It is inconvenient to ride the bus with many stops that result in a 1-hour trip when the alternative (driving or asking for a ride) is much faster
3. Bus driver attitudes
  - When approached with questions about routes and how to get to particular destinations, drivers were accused of being rude and providing a schedule map
  - Some women participants expressed feeling uncomfortable around bus drivers they felt would look at them inappropriately
4. Bus service isn't provided to the areas I need to go (non riders)
  - Bus service isn't provided near agricultural fields, where many of the non-rider population work.
  - Bus service isn't provided to doctor or dentist offices in nearby cities

#### Key issues of concern for (bus riders/former bus riders)

1. Price of Fare
  - The price of fare is expensive especially because no transfer system exists. It is unfair for low-income riders to have to pay full fare for a one-way trip that requires transfer of buses.
  - It is especially hard for families with children to travel on the bus for two main reasons:
    1. Children above 46 inches must pay full fare
    2. There is a limit of 3 children per fare-paying adult
2. Bus stop locations
  - Need shelters and good lighting so riders can feel comfortable and safe while waiting for the bus to arrive
  - Need to be provided near major sources of employment for low-income riders (e.g. near agricultural fields)

### Travel Alternatives Used by Non-Riders

#### Carpools

Based on the fact that the majority of the focus groups participants were non-riders questions were asked to determine what alternatives they used to travel and get where they needed to go. Generally, non-riders worked in agricultural fields and said they would carpool with co-workers. They self reported that they would pay approximately \$25 a week to the driver.

**Rides**

Participants said that when they wanted to make trips that were possible by bus they would typically ask a friend, a relative, or neighbor for a ride. However, they expressed feelings of guilt for imposing themselves on their ride providers and would often pay them \$20 or more for their “troubles.” Rides became a particularly troublesome when ride providers would have to travel to another field site and left the carpoolers without a ride.

**Taxi**

In emergency situations participants said they relied on taxi service which was often costly but necessary due to the nature of their trips.

**Improvements or modifications that METRO could make to increase your likeliness to use transit**

- Provide an express route between Watsonville and Santa Cruz
- Provide more information about bus scheduling and stop locations
- Provide bus shelters. The majority of bus stops are only designated by a pole with the route number and provide no weather protection
- Provide good lighting and emergency phones at bus stop locations in remote areas
- Widely advertise service changes to bus routes
- Introduce a discounted bus fare price for children
- Introduce a bus transfer system
- Provide more bilingual bus drivers

## CAPITOLA FOCUS GROUP RESULTS

As part of the community outreach effort included in the development of the Santa Cruz METRO's 2008-2012 Short Range Transit Plan (SRTP), Wilbur Smith Associates (WSA) conducted a focus groups with non-users of the transit service in the community of Capitola on Thursday, May 17 2007. The focus group was held during the evening hours at Capitola City Hall.

The purpose of this focus group was threefold: 1) to identify if the members of the community were aware of METRO service in the City of Capitola and the surrounding areas, 2) to identify the major reasons why METRO service is not currently used, and 3) to identify what service changes would increase the use of transit. The participants were a representative group of the Capitola community, comprised of users and non-users, owners and renters. The participants included the following individuals:

Name	Tenancy	Gender	Age	Disabled
Bob Begun	Renter	M	80	
Shirley Forsyth	Owner	F	65+	X
Henry Queen	Owner	M	77	X
Mike Spence	Owner	M	58	
John Nicol	Owner	M	59	
Toni Castro	Owner	F	54	
Mick Routh	Owner	M	62	
Thea Luitin	Owner	F	44	
Julius Burks	Renter	M	52	
John Travers	Renter	M	53	
Lyn Travers	Renter	F	54	
Dewayne Woods	Owner	M	39	
B.J. Crawford	Renter	F	29	
Sharon Presco	Renter	F	59	
Debbie Johnson	Renter	F	49	

The focus group began with an introduction and presentation by WSA staff person, Robert Betts, who gave a brief overview of METRO's SRTP and explained why their participation in the process was important. Following the presentation, the group was asked a few preliminary questions to establish their level of familiarity with METRO service in Capitola. Additional questions were then asked to obtain the group's input on changes and improvements to METRO service in Capitola.

The Capitola focus group attendees had a lot of useful feedback regarding the METRO service. Attendees were non-users, infrequent users, former users almost all had specific comments about existing routes and frequencies, destinations and how METRO might better serve the community. Residents seemed mostly concerned about increasing local service within and around the city as opposed to to-and-from Watsonville and Santa Cruz. Other major concerns included:

- Provision, transparency and convenience of service information
- More convenient start and end schedule for work hours

- Capitola Mall identified as an inconvenient place for most locals that want to go directly to Santa Cruz
- METRO's buses are too large/noisy for Capitola's small streets

Each of the issues addressed at the focus group are outlined in greater detail in the sections below:

## **Concerns/Complaints/Issues with METRO Transit Service:**

### **Senior/Disabled concerns**

- Metro doesn't send out service information
- Need to go to Capitola Mall, can't get schedules
- Para-Cruz difficult to plan trips, very restrictive/inflexible
- 3-hours out of life each day to take a trip

### **Inconvenience – Origins & Destinations**

- Most Capitola routes go to Mall – this is inconvenient
- Buses only go to downtown, Santa Cruz or Mall, not around Capitola, or neighborhoods
- 80% of shopping is done within city limits, but most routes are ins and outs

### **Information**

- Schedules not user-friendly
- Bus-stops are not on web site

### **Frequency**

- Round-trip 3-hours to DT Santa Cruz
- Wait 10-25 minutes for bus, take to mall and transfer
- Buses at “hill district” only come twice per day during commute hours
- Cannot get home after work (service stops too early)
- Cannot get to work with METRO because service starts too late

### **Reliability**

- Reliance on transit lost one person a potential job due to negative perception of METRO on-time reliability

### **Distance to bus-stops**

- Taking METRO to work is convenient only when within 2/blocks of work or home

**Quality of Service**

- Buses are too big (too loud) for the roads in Capitola
- Need smaller buses here
- Buses are filthy
- Feel unsafe

**Equity**

- Capitola should have our share of service based on the amount of sales tax we contribute (we pay more and get less)
- METRO should train potential riders early and give students free passes

**Suggestions for Improvements****Trolley/Circulator**

- Current shuttle goes from Post office to beach and back
- Why not have the same as UCSC shuttle bus system that complements METRO
- Trolley would be fun in Capitola
- Get rides up the hill
- Regular schedule, 10 -20 minute frequency
- Circulator – continual loop
- Luggage, storage area for errands
- Local neighborhoods: JB, Vill, Cliffwood, Gayles Bakery, North 40ths, Beach, NH's, Shopping,
- Serve tourists and residents
- Willingness to pay?
  - Merchant funded
  - Token promotional
  - coupon system

**Serve more destination/routes**

- Direct service from Capitola neighborhoods to Santa Cruz bypassing Mall
- Esplanade would be nice to have bus routes
- Mall, Village, Bay Avenue
- Library, beach, golf course, recreational areas
- Golf course, wharf to wharf

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**Provide more information**

- Next Bus
- Mapquest tool: you type in o/d it provides route and stops
- Capitola Local TV – rolling scroll with route change information
- City newsletter

**Environmentally clean buses – natural gas/electric**

- Summer busses are popular, attractive and fun
- Good time, green focus
- Natural gas, electric buses more green

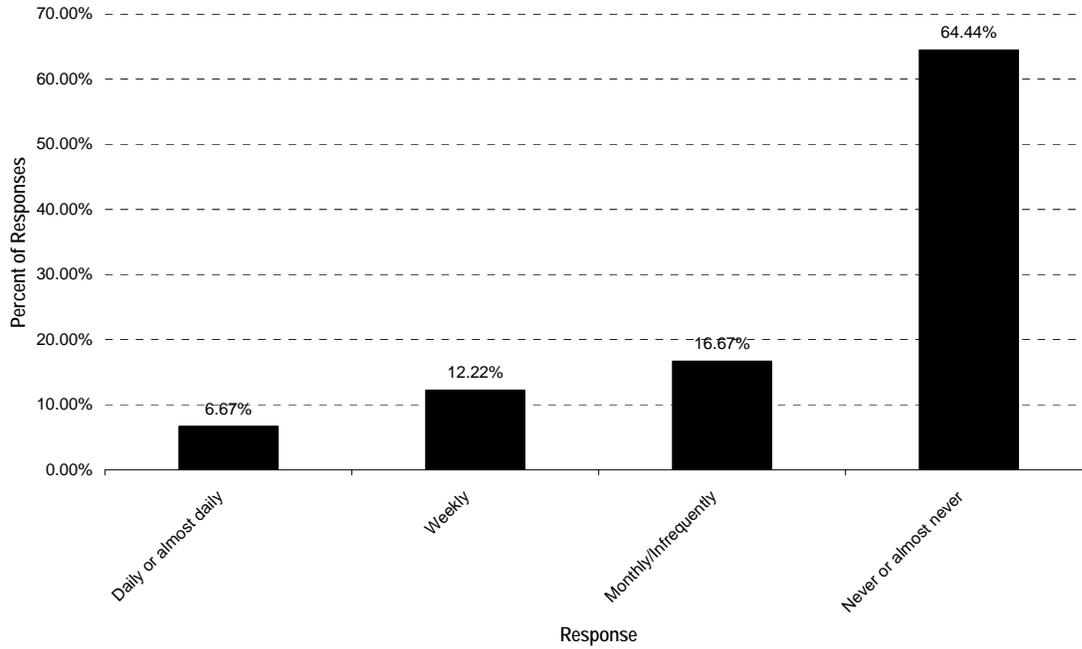
**Other Capitola Information**

- population is declining and aging
- growing rental housing stock
- aging population is transit dependant, needs to get to hospital, doctor, pharmacy
- greater need for inter-city than intra-city transport with a regular (memorizable) frequency
- Watsonville is labor pool
  - Destination 41st Avenue, no housing there
  - Watsonville to Capitola mall routes should be focused on commute hours
- Population would like to be able to take METRO/trolley to dinner/shopping and back

## CABRILLO COLLEGE WEB SURVEY RESULTS

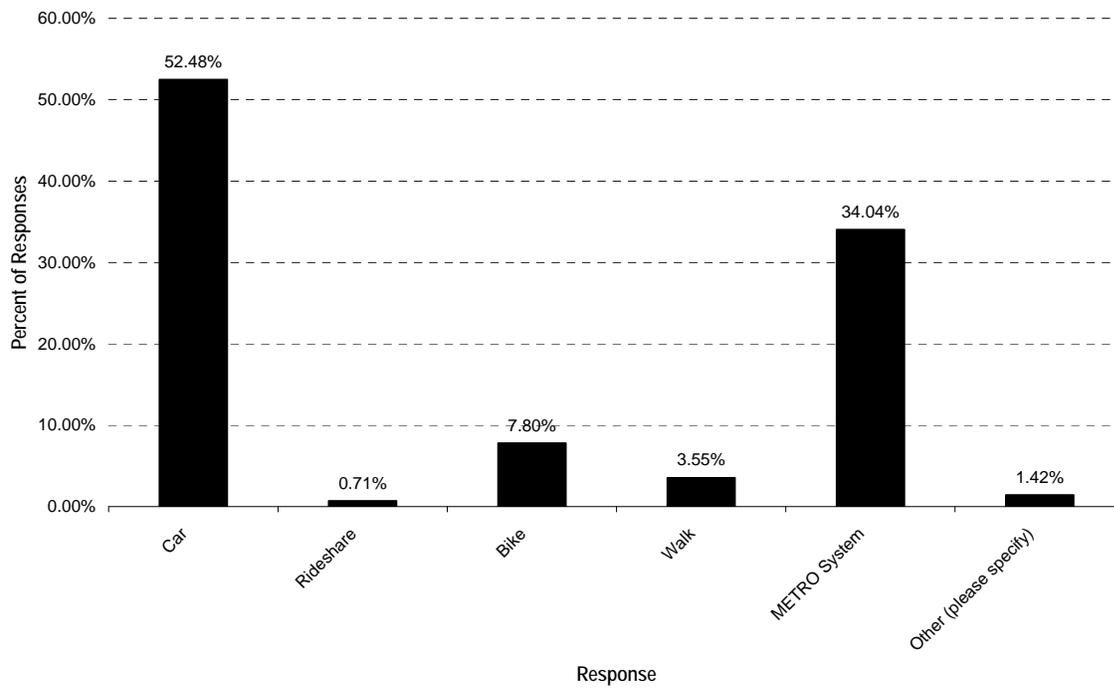
**How frequently do you use METRO for trips to Cabillo College?**  
(Transit Non-Users)

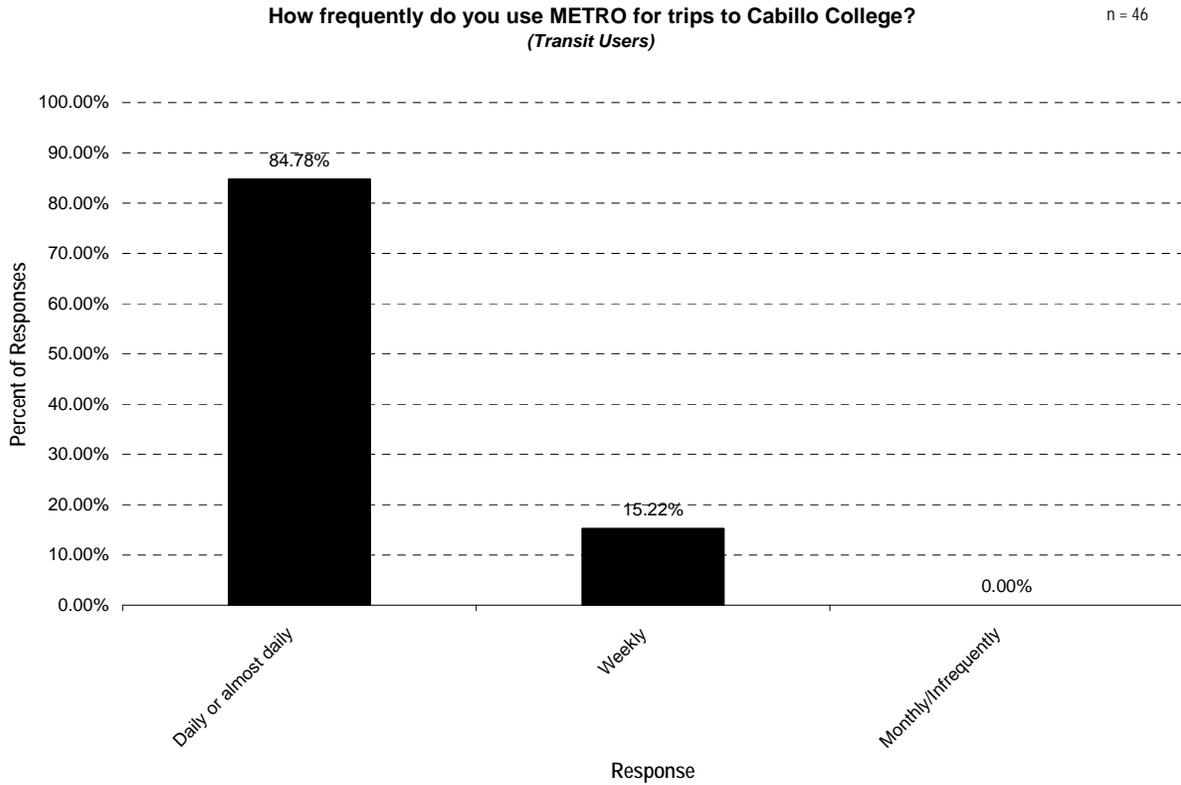
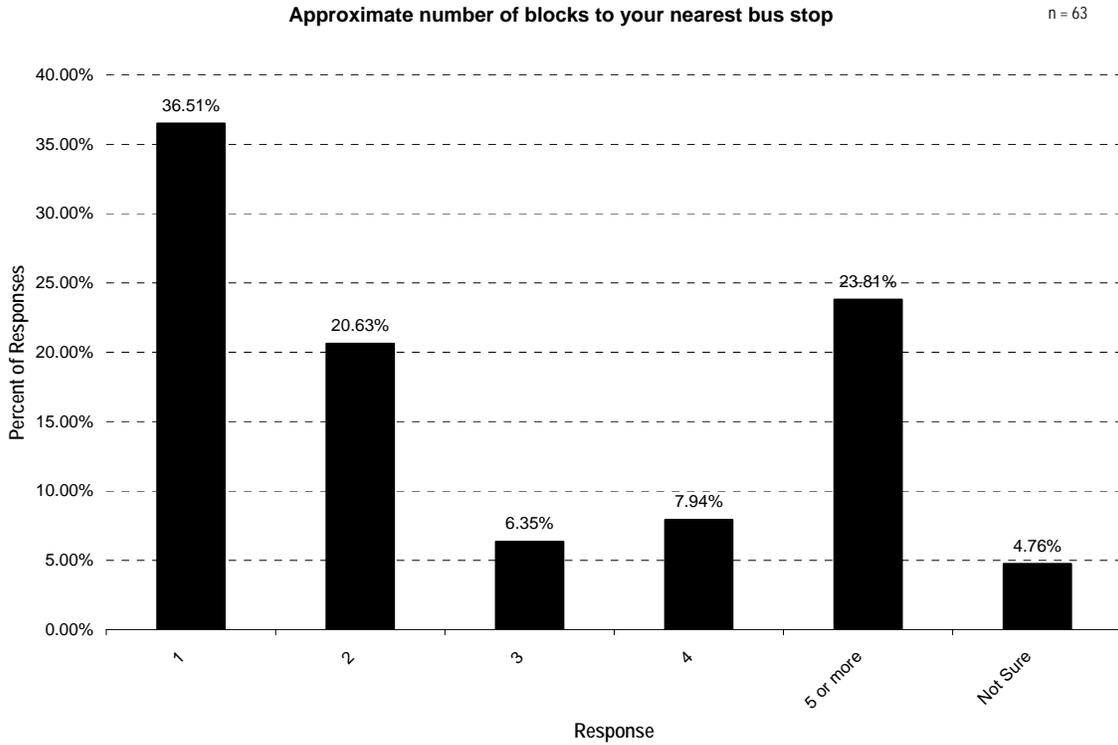
n = 90



**How do you most often get to Cabrillo College?**

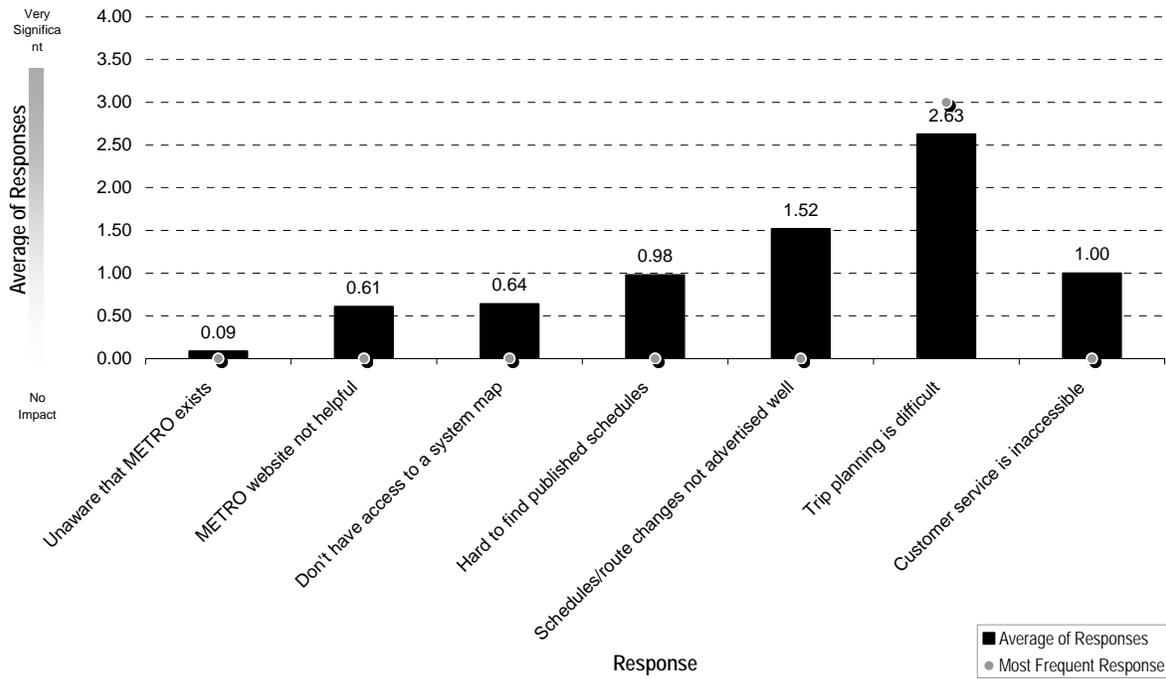
n = 141





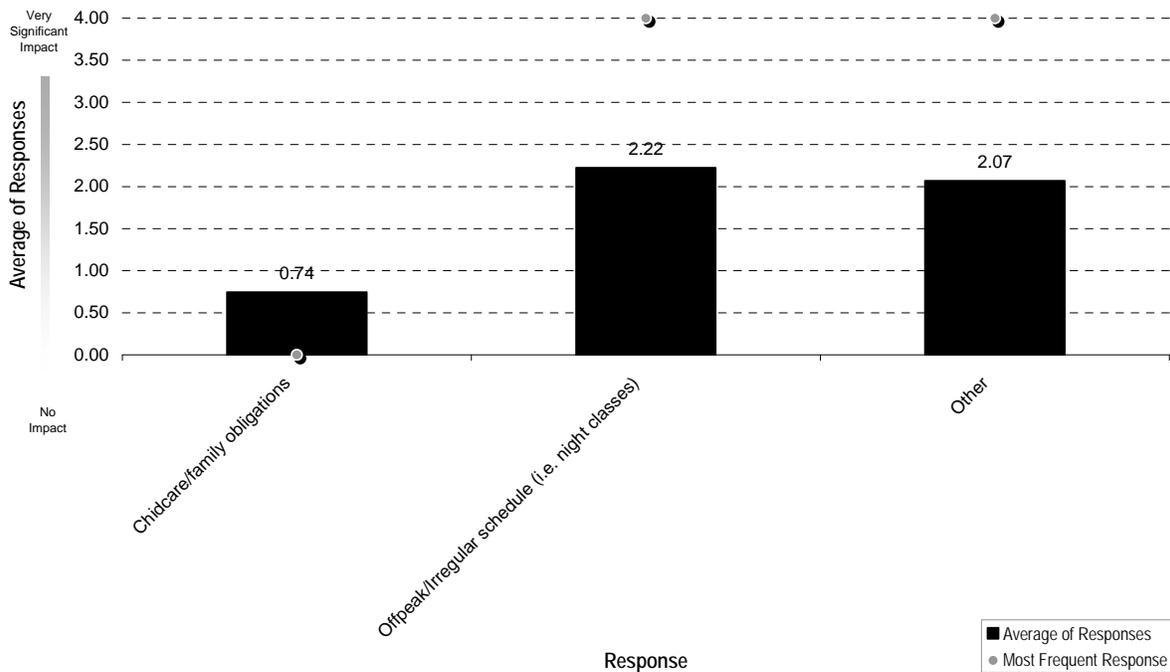
To what extent have the following factors impacted your decision NOT to commute primarily by bus? n = 64

Category: Poor Service Information



To what extent have the following factors impacted your decision NOT to commute primarily by bus? n = 63

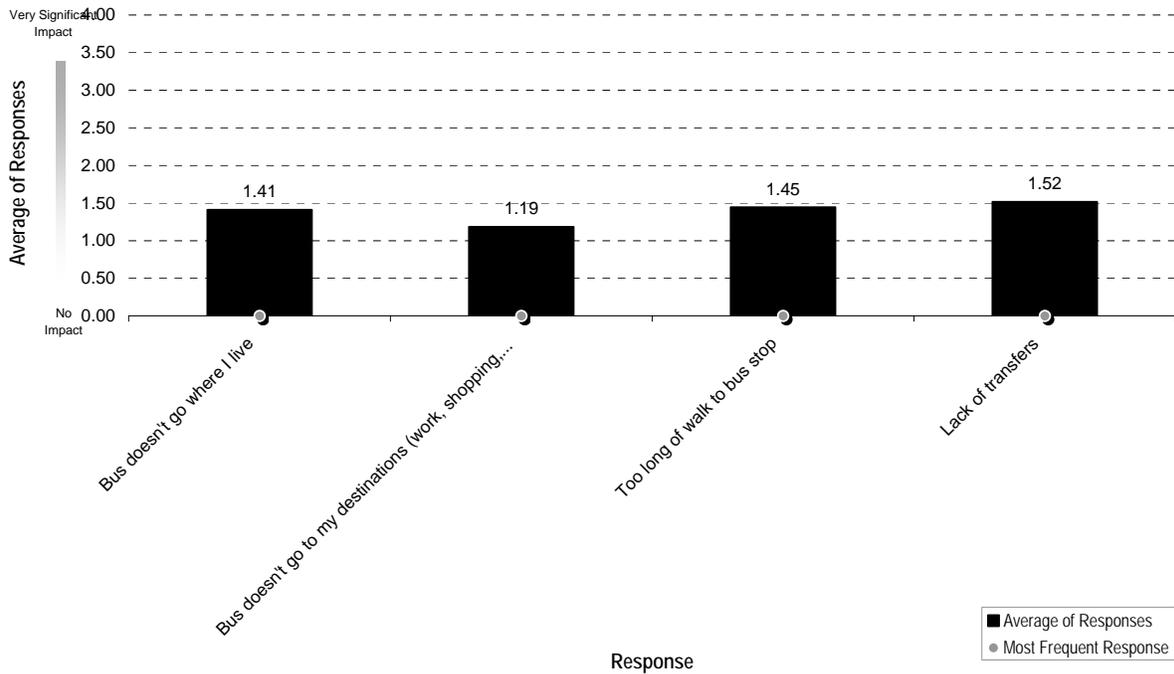
Category: Non-Convenient for My Lifestyle



To what extent have the following factors impacted your decision NOT to commute primarily by bus?

n = 60

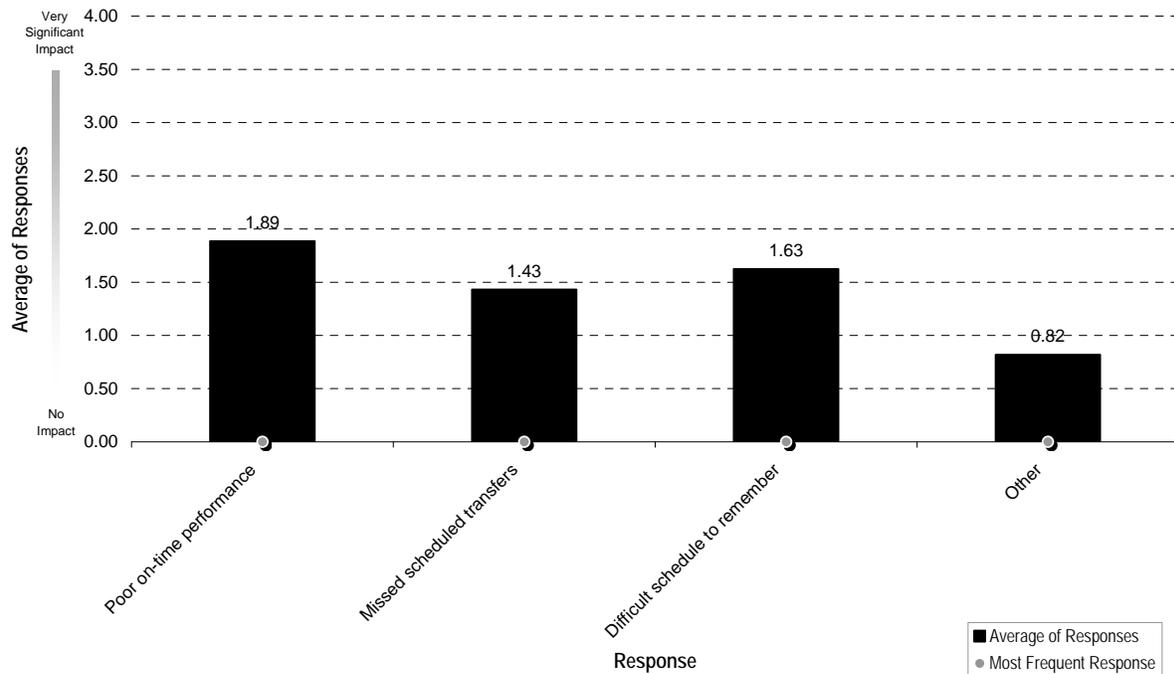
**Category: Poor or Limited Service Area Coverage**



To what extent have the following factors impacted your decision NOT to commute primarily by bus?

n = 59

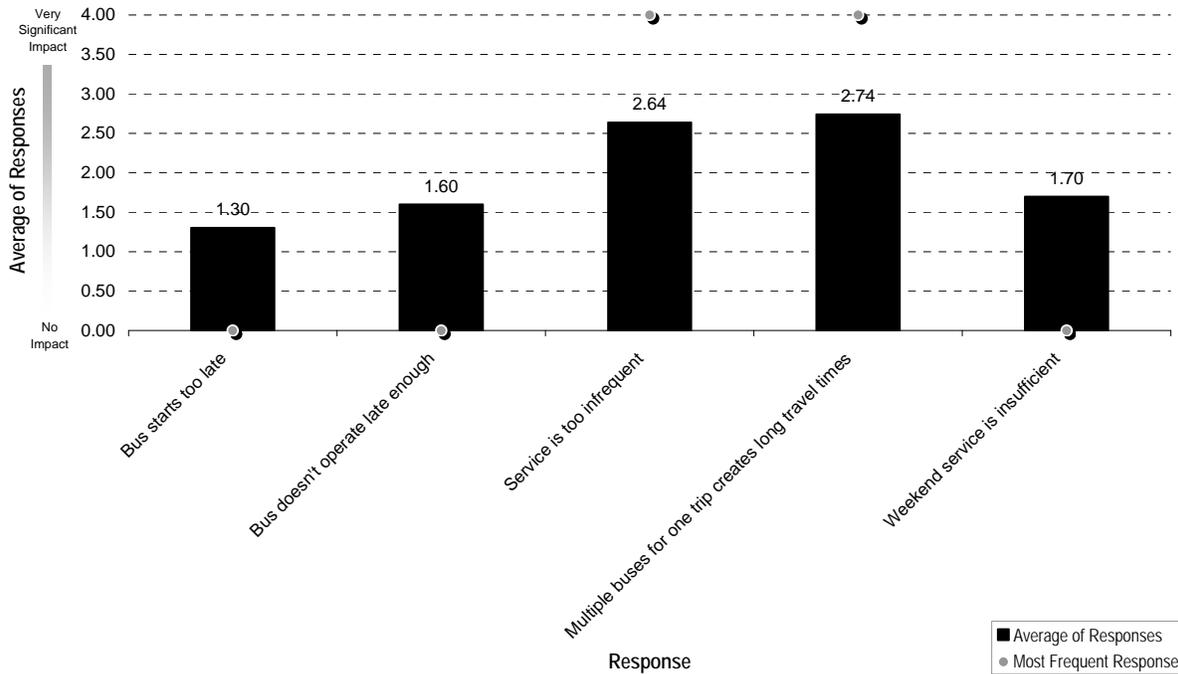
**Category: METRO Service Reliability**



To what extent have the following factors impacted your decision NOT to commute primarily by bus?

n = 63

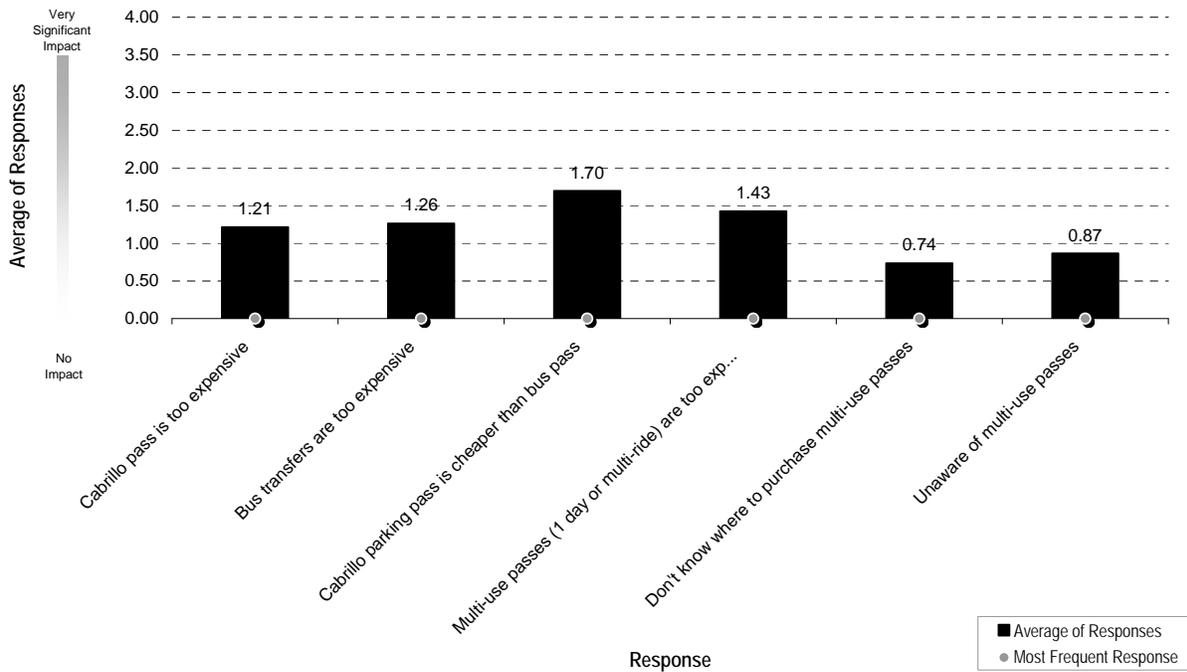
Category: Poor or Limited Time Coverage



To what extent have the following factors impacted your decision NOT to commute primarily by bus?

n = 60

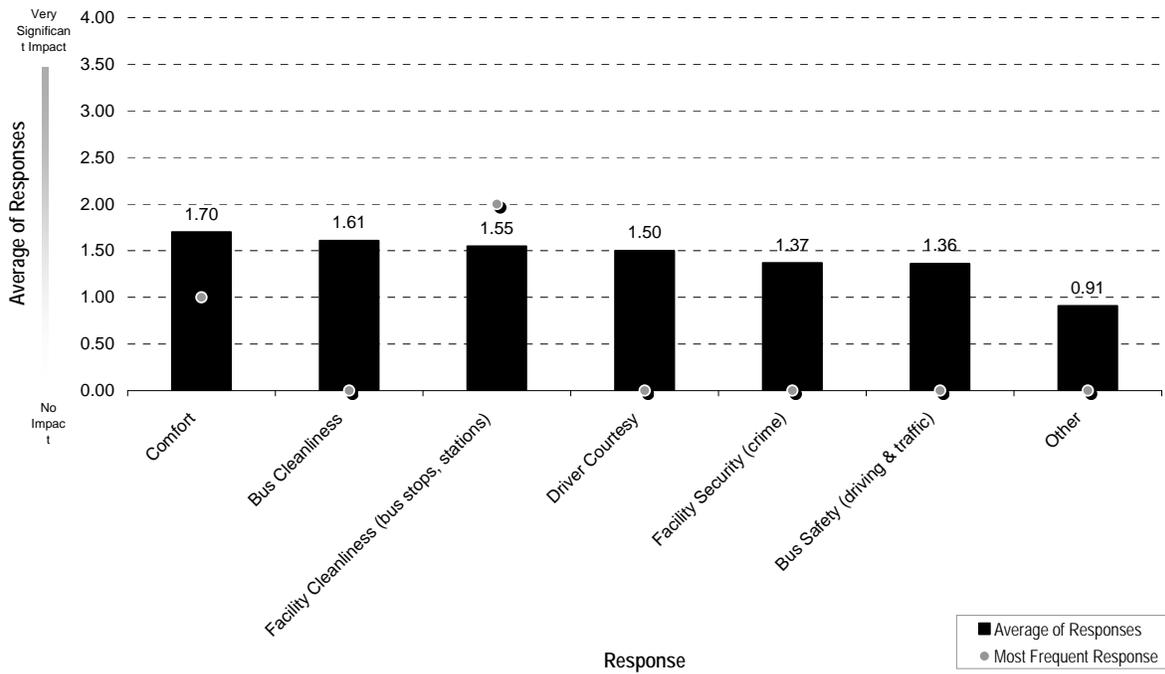
Category: METRO Service Cost



To what extent have the following factors impacted your decision NOT to commute primarily by bus?

n = 56

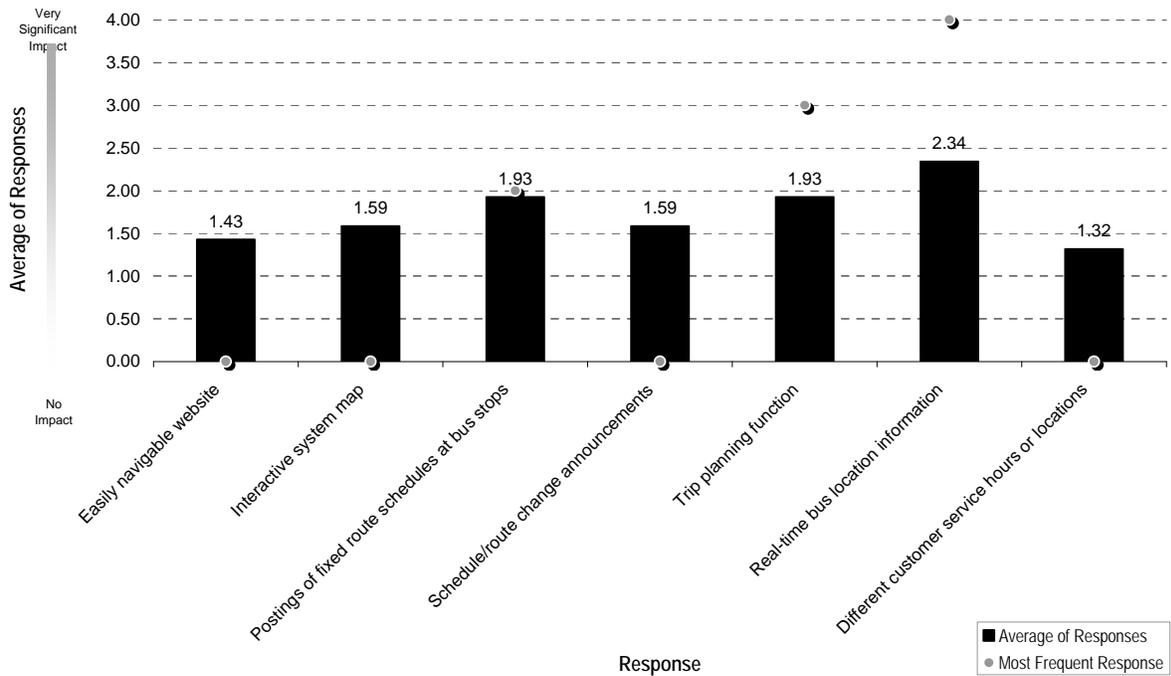
Category: METRO Service Quality



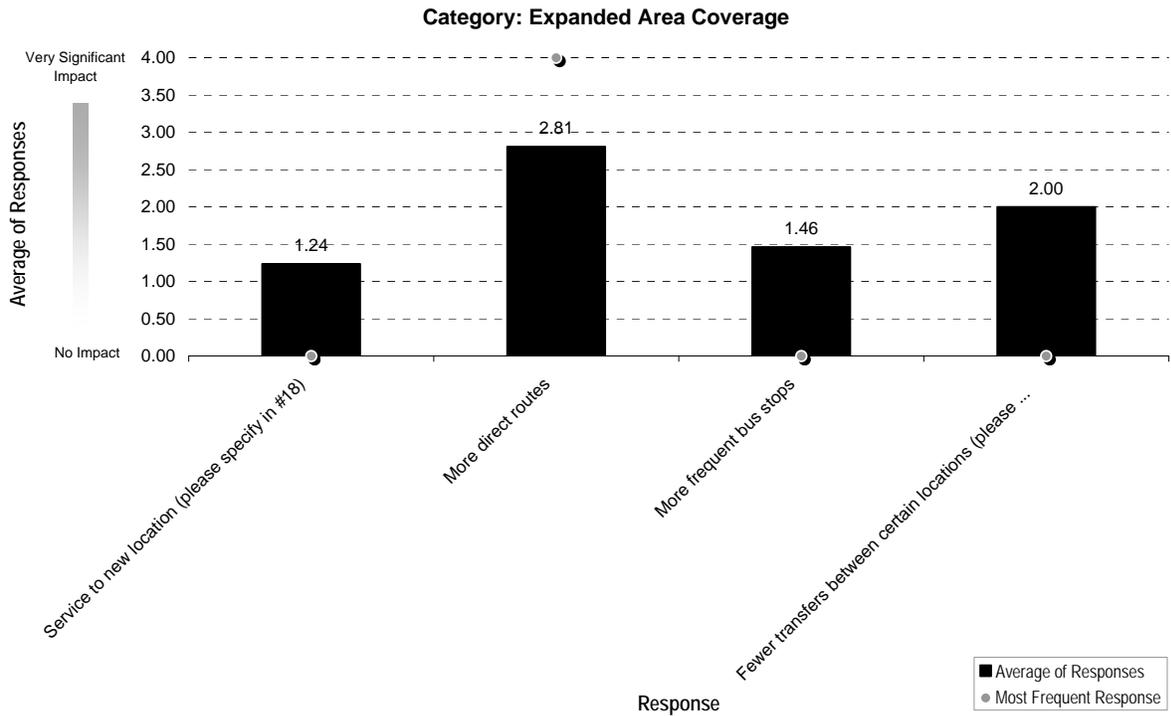
To what extent would the following impact your decision to INCREASE your use of METRO Service in the future?

n = 42

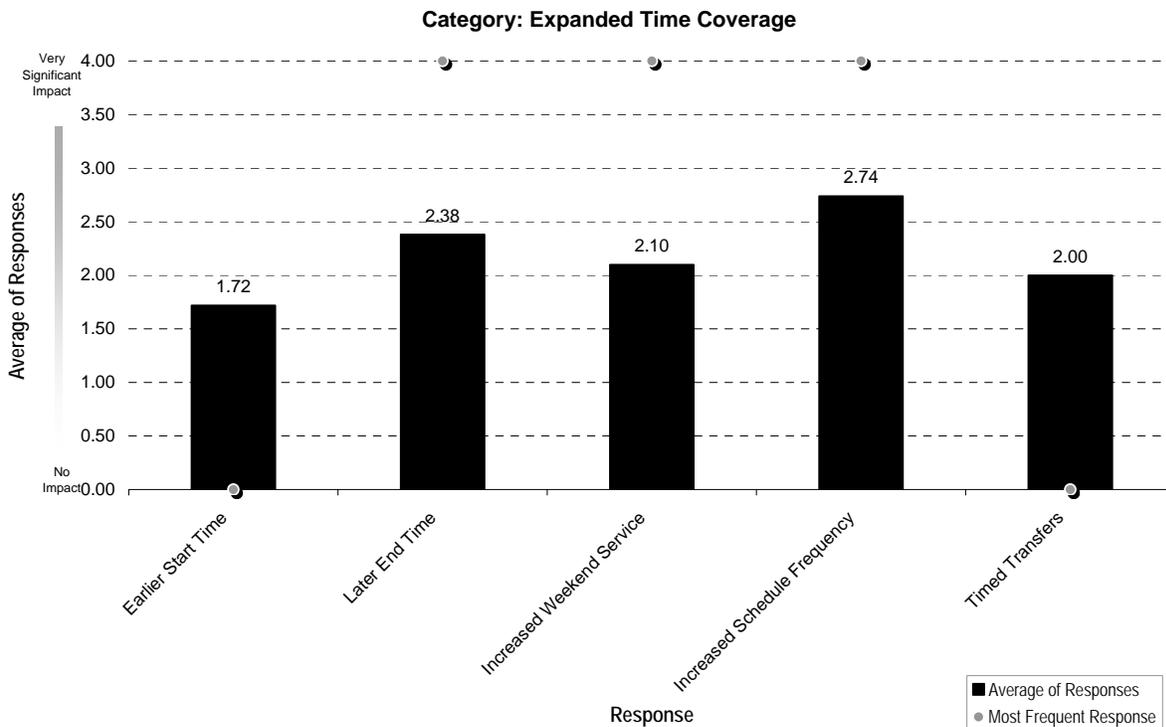
Category: Expanded Service Information



To what extent would the following impact your decision to INCREASE your use of METRO Service in the future? n = 42

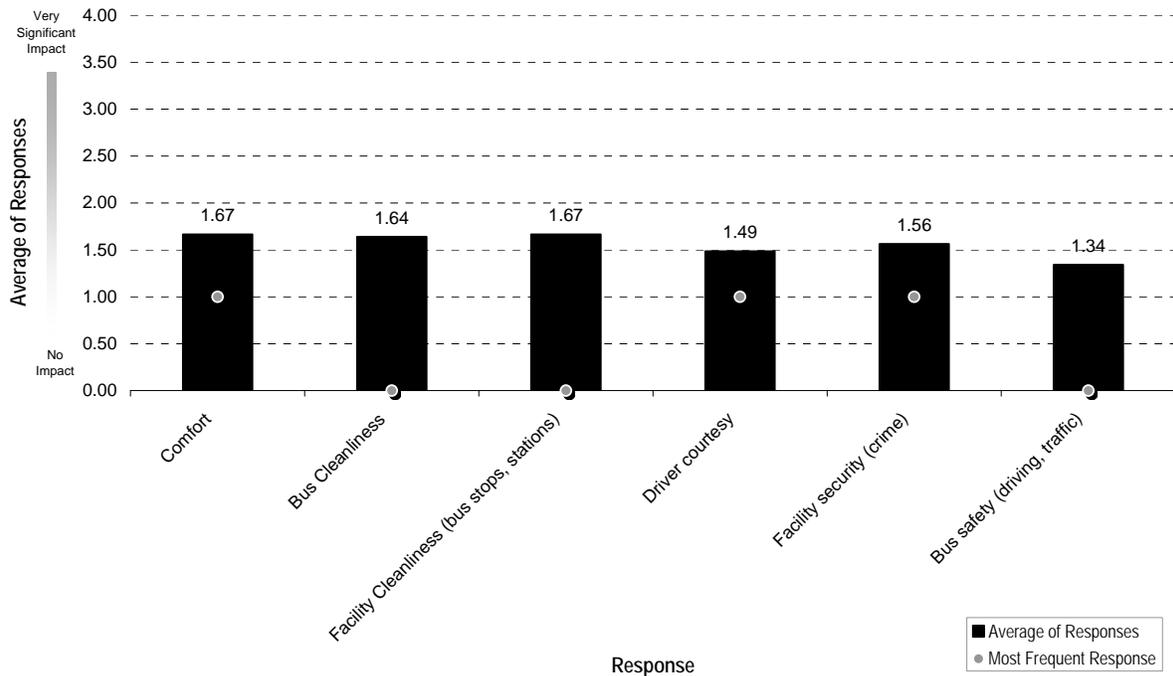


To what extent would the following impact your decision to INCREASE your use of METRO Service in the future? n = 42



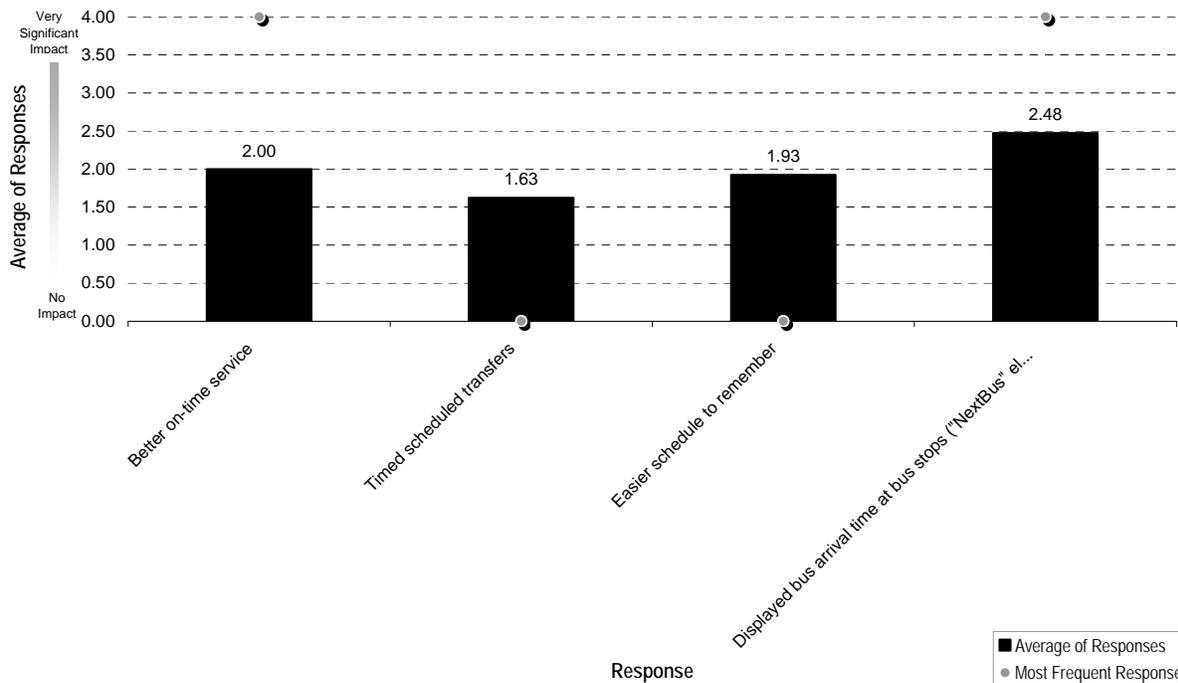
To what extent would the following impact your decision to INCREASE your use of METRO Service in the future? n = 39

Category: Improved Service Quality



To what extent would the following impact your decision to INCREASE your use of METRO Service in the future? n = 40

Category: Improved Service Reliability



Comments from "Other" Responses:

Question 1: How do you most often get to METRO?

I use the metro and sometimes get rides
wheelchair

Question 5: Poor Service Information

Sometimes the buses are too packed and some bus drivers are rude and don't wait until you sit down before they start driving. I have almost fallen from this or seen others almost fall.
Routes are not relevant to my commute needs
It is more complicated, time and route-wise for me to take the bus
Some times the bus drivers can be rude and don't stop and it really ruins my day because ill be late to work or school.
I live in Aromas, no bus line.
My area is serviced just 1x during an hour. It's the inflexibility that prevents me from using public transportation.
Infrequent
It took me an hour to get to school from West Santa Cruz to Cabrillo and I had to walk a mile home each night at 11 pm through a sketchy area
Waiting period is too long between buses
Poor service
Even on prime route, busses too infrequent
Service not reliable
Routes ridiculous, inefficient for cross-town+ no transfers
Maps are difficult to read

Question 7: Taking the bus isn't convenient to my lifestyle.

I like biking to school
Convenience of leaving when i want directly home 2 mi
Too Busy, bus takes too long
I apparently have to take 3 different buses from my house to Cabrillo, a trip of about an hour and a half (compared to 20 minutes in a car)
Too many stops

IT takes to long.
Fear of not being safe - bus stops are unsafe, people in SLV are scary and predatory at bus stops, where drugs are dealt
I quite often have heavy/bulky artwork supplies to transport
Because I don't know if they are going to stop or leave me there.
Frequently, the 71 is very late and does not follow the time tables listed. I don't take the bus anymore because the bus system is not very efficient or reliable.
Slow service (15 min. car trip takes 30 min. bus)
Needing to be places right after one another. no time to wait for bus
There is no route within three miles of my home.
I live far away from school
I can not be sure I will be on time when I take the bus
No transit service on Glen canyon
Bus pass does not work on Sundays
No bus service near my house
Taking the bus is like a long journey, as opposed to simple transportation
It's all about the drivers, the passengers seem like a secondary consideration. . Everybody doesn't get all those union holidays off. I don't have 3 hours a day for a half hour worth of commuting
Service so limited by time and area
I like to bike but bus is second choice
Bus takes too long
Bus takes too long to transport
Too far to walk for me.
Coordination with employment

Question 13: METRO service reliability?

Plenty reliable, bus trips from downtown to Cabrillo and back too infrequent
Need some express service
Uncertain of reliability - data not published or easily available
I've never taken a bus.
Bus schedules do not reflect ACTUAL arrival times
It's a really cute trick when the bus has came and gone like fifteen minutes before its scheduled time. or doesn't run for the last scheduled run.

Not convenient like other cities + how it was here
--

Question 15: METRO Service Quality?

Too many fumes/smells
Some drivers are wonderful and some are abusive. We have no action to take if they are bad
I've never taken a bus

Question 18: New locations for expanded service?

Amesti Rd.
Felton - East Zayante past glen arbor - it must be safe, security camera/well-patrolled stop
Lockwood and Whispering Pines
More nonstop from Watsonville
AROMAS
Branciforte Drive
More stops in Bonny Doon
Shaffer Rd area coverage

Question 19: Reduce the need to transfer between these locations?

East Zayante and Glen Arbor to downtown Santa Cruz, 17th Ave, River Street (Costco)
Scotts Valley and Cabrillo
Capitola and Cabrillo
Cabrillo Metro Buses specifically for students only
Western to Cabrillo
Green Valley rd /Cabrillo/Santa Cruz
To Cabrillo College
I have to go downtown first to get anywhere (ie. Cabrillo, Capitola)
Cabrillo and UCSC
Westside Santa Cruz and Capitola/Aptos/Soquel
Cabrillo to UCSC
Rio del Mar and Santa Cruz
Westside and Cabrillo
Westside to Cabrillo without stop at Metro center

Question 23: Other service area improvements or amenities?

Remove billboards/ads on buses
A more efficient system for 71 would be great.
Bus from Cabrillo to SJSU
Expand service not excess technology.

## APPENDIX E: FINANCIAL TABLES

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The following tables show the detailed revenue sources for actual end FY07 through projected FY12 using three different projection methodologies including:

- METRO projections based on MTD five year framework (November 2007) – Table H-1
- Projections based on historic METRO budgets – Table H-2
- Recommended projections for SRTP – Table H-3
- Projections based on SCMTD TY 2009 Budget – Table H-4
- Historic budget analysis – Table H-5
- METRO year end actuals – Table H-6
- Historic and projected sales tax revenue – Table H-7

Table H-1: METRO Five Year Framework Projection

REVENUE SOURCE	YEAR END ACTUAL FY07	PROJ. YEAR END ACTUAL FY08	PROJ FY09	PROJ FY10	PROJ FY11	PROJ FY12	AVG. ANNUAL CHANGE FY09/ FY12
Passenger Fares	\$ 3,406,079	\$ 3,450,078	\$ 3,519,080	\$ 3,589,461	\$ 3,661,250	\$ 3,734,475	2%
Special Transit Fares	\$ 2,837,936	\$ 3,050,000	\$ 3,202,500	\$ 3,362,625	\$ 3,530,756	\$ 3,707,294	5%
Paratransit Fares	\$ 229,100	\$ 229,644	\$ 231,940	\$ 234,260	\$ 236,602	\$ 238,968	1%
Highway 17 Fares	\$ 818,902	\$ 842,000	\$ 867,260	\$ 893,278	\$ 920,076	\$ 947,678	3%
Highway 17 Payments	\$ 438,482	\$ 509,000	\$ 524,270	\$ 539,998	\$ 556,198	\$ 572,884	3%
Commissions	\$ 5,695	\$ 5,372	\$ 5,372	\$ 5,372	\$ 5,372	\$ 5,372	0%
Advertising Income	\$ 243,273	\$ 200,461	\$ 175,000	\$ 180,250	\$ 185,658	\$ 191,227	3%
Rent Income - SC Metro Center	\$ 85,935	\$ 81,803	\$ 83,439	\$ 85,108	\$ 86,810	\$ 88,546	2%
Rent Income - Watsonville TC	\$ 50,644	\$ 45,758	\$ 46,673	\$ 47,607	\$ 48,559	\$ 49,530	2%
Rent Income - General	\$ 4,800	\$ -	\$ -	\$ -	\$ -	\$ -	0%
Interest Income	\$ 1,327,929	\$ 875,000	\$ 750,000	\$ 500,000	\$ 450,000	\$ 450,000	
Other Non-Trans Revenue	\$ 269,279	\$ 136,000	\$ 170,000	\$ 175,100	\$ 180,353	\$ 185,764	3%
Sales Tax	\$ 17,652,773	\$ 17,624,453	\$ 18,065,064	\$ 18,516,691	\$ 18,979,608	\$ 19,454,098	3%
Transp Dev Act (TDA) Funds	\$ 6,165,834	\$ 6,362,036	\$ 6,552,897	\$ 6,749,484	\$ 6,951,969	\$ 7,160,528	3%
FTA Sec 5307 - Op Assistance	\$ 3,200,226	\$ 3,153,552	\$ 3,216,623	\$ 3,280,956	\$ 3,346,575	\$ 3,413,506	2%
Repay FTA Advance (5 years)	\$ (70,000)	\$ (70,000)	\$ (70,000)	\$ (70,000)	\$ -	\$ -	0%
FTA Sec 5311 - Rural Op Asst	\$ 168,582	\$ 149,335	\$ 155,308	\$ 161,521	\$ 167,982	\$ 174,701	4%
Transfer from Capital/Proj Mgr	\$ -		\$ -	\$ -	\$ -	\$ -	4%
<b>SUBTOTAL REVENUE</b>	<b>\$ 6,835,469</b>	<b>\$ 36,644,493</b>	<b>\$ 7,495,427</b>	<b>\$38,251,710</b>	<b>\$ 39,307,767</b>	<b>\$ 40,374,572</b>	
<b>ANNUAL INCREASE</b>			<b>2.3%</b>	<b>2.0%</b>	<b>2.8%</b>	<b>2.7%</b>	
<b>ONE-TIME REVENUE</b>							
Carryover from Prev. Year	\$ -		\$ -	\$ -	\$ -	\$ -	
Transfer from Insurance Reserves	\$ -	\$ 30,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	
Transfer from Reserves		\$ 152,270					
FTA Sec 5317 - Op Assistance	\$ -	\$ 17,785	\$ -	\$ -	\$ -	\$ -	
AMBAG Funding (Intern & SRTP)	\$ 39,404	\$ 43,746	\$ -	\$ -	\$ -	\$ -	
<b>SUBTOTAL ONE-TIME REVENUE</b>	<b>\$ 39,404</b>	<b>\$ 243,801</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	
<b>TOTAL REVENUE</b>	<b>\$ 6,874,873</b>	<b>\$ 36,888,294</b>	<b>\$37,645,427</b>	<b>\$38,401,710</b>	<b>\$ 39,457,767</b>	<b>\$ 40,524,572</b>	

Table H-2: Projections Based on Historic METRO Budgets

REVENUE SOURCE	YEAR END ACTUAL FY07	PROJ. YEAR END ACTUAL FY08	PROJ FY09	PROJ FY10	PROJ FY11	PROJ FY12	AVG. ANNUAL CHANGE FY09/ FY12
Passenger Fares	\$ 3,406,079	\$ 3,450,078	\$ 3,450,078	\$ 3,450,078	\$ 3,450,078	\$ 3,450,078	0%
Special Transit Fares	\$ 2,837,936	\$ 3,050,000	\$ 3,202,500	\$ 3,362,625	\$ 3,530,756	\$ 3,707,294	5%
Paratransit Fares	\$ 229,100	\$ 229,644	\$ 231,940	\$ 234,260	\$ 236,602	\$ 238,968	1%
Highway 17 Fares	\$ 818,902	\$ 842,000	\$ 867,260	\$ 893,278	\$ 920,076	\$ 947,678	3%
Highway 17 Payments	\$ 438,482	\$ 509,000	\$ 524,270	\$ 539,998	\$ 556,198	\$ 572,884	3%
Commissions	\$ 5,695	\$ 5,372	\$ 5,372	\$ 5,372	\$ 5,372	\$ 5,372	0%
Advertising Income	\$ 243,273	\$ 200,461	\$ 175,000	\$ 180,250	\$ 185,658	\$ 191,227	3%
Rent Income - SC Metro Center	\$ 85,935	\$ 81,803	\$ 83,439	\$ 85,108	\$ 86,810	\$ 88,546	2%
Rent Income - Watsonville TC	\$ 50,644	\$ 45,758	\$ 46,673	\$ 47,607	\$ 48,559	\$ 49,530	2%
Rent Income - General	\$ 4,800	\$ -	\$ -	\$ -	\$ -	\$ -	0%
Interest Income	\$ 1,327,929	\$ 875,000	\$ 750,000	\$ 500,000	\$ 450,000	\$ 450,000	
Other Non-Transp Revenue	\$ 269,279	\$ 136,000	\$ 170,000	\$ 175,100	\$ 180,353	\$ 185,764	3%
Sales Tax	\$ 17,652,773	\$ 17,624,453	\$ 18,065,064	\$ 18,516,691	\$ 18,979,608	\$ 19,454,098	2.5%
Transp Dev Act (TDA) Funds	\$ 6,165,834	\$ 6,362,036	\$ 6,552,897	\$ 6,749,484	\$ 6,951,969	\$ 7,160,528	3.0%
FTA Sec 5307 - Op Assistance	\$ 3,200,226	\$ 3,153,552	\$ 3,216,623	\$ 3,280,956	\$ 3,346,575	\$ 3,413,506	2.0%
Repay FTA Advance (5 years)	\$ (70,000)	\$ (70,000)	\$ (70,000)	\$ (70,000)	\$ -	\$ -	0%
FTA Sec 5311 - Rural Op Asst	\$ 168,582	\$ 149,335	\$ 155,308	\$ 161,521	\$ 167,982	\$ 174,701	4%
Transfer from Capital/Proj Mgr	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4%
<b>SUBTOTAL REVENUE</b>	<b>\$36,835,469</b>	<b>\$ 36,644,493</b>	<b>\$ 37,426,426</b>	<b>\$ 38,112,326</b>	<b>\$ 39,096,595</b>	<b>\$ 40,090,175</b>	
<b>ANNUAL INCREASE</b>			<b>2.1%</b>	<b>1.8%</b>	<b>2.6%</b>	<b>2.5%</b>	
<b>ONE-TIME REVENUE</b>							
Carryover from Previous Year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Transfer from Insurance Reserves	\$ -	\$ 30,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	
Transfer from Reserves		\$ 152,270					
FTA Sec 5317 - Op Assistance	\$ -	\$ 17,785	\$ -	\$ -	\$ -	\$ -	
AMBAG Funding (Intern & SRTP)	\$ 39,404	\$ 43,746	\$ -	\$ -	\$ -	\$ -	
<b>SUBTOTAL ONE-TIME REVENUE</b>	<b>\$ 39,404</b>	<b>\$ 243,801</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	
<b>TOTAL REVENUE</b>	<b>\$36,874,873</b>	<b>\$ 36,888,294</b>	<b>\$ 37,576,426</b>	<b>\$ 38,262,326</b>	<b>\$ 39,246,595</b>	<b>\$ 40,240,175</b>	

Table H-3: Recommended Projections for SRTP

REVENUE SOURCE	YEAR END ACTUAL FY07	PROJ. YEAR END ACTUAL FY08	PROJ FY09	PROJ FY10	PROJ FY11	PROJ FY12	AVG. ANNUAL CHANGE FY09/ FY12
Passenger Fares	\$ 3,406,079	\$ 3,450,078	\$ 3,519,080	\$ 3,589,461	\$ 3,661,250	\$ 3,734,475	2%
Special Transit Fares	\$ 2,837,936	\$ 3,050,000	\$ 3,202,500	\$ 3,362,625	\$ 3,530,756	\$ 3,707,294	5%
Paratransit Fares	\$ 229,100	\$ 229,644	\$ 231,940	\$ 234,260	\$ 236,602	\$ 238,968	1%
Highway 17 Fares	\$ 818,902	\$ 842,000	\$ 867,260	\$ 893,278	\$ 920,076	\$ 947,678	3%
Highway 17 Payments	\$ 438,482	\$ 509,000	\$ 524,270	\$ 539,998	\$ 556,198	\$ 572,884	3%
Commissions	\$ 5,695	\$ 5,372	\$ 5,372	\$ 5,372	\$ 5,372	\$ 5,372	0%
Advertising Income	\$ 243,273	\$ 200,461	\$ 175,000	\$ 180,250	\$ 185,658	\$ 191,227	3%
Rent Income - SC Metro Center	\$ 85,935	\$ 81,803	\$ 83,439	\$ 85,108	\$ 86,810	\$ 88,546	2%
Rent Income - Watsonville TC	\$ 50,644	\$ 45,758	\$ 46,673	\$ 47,607	\$ 48,559	\$ 49,530	2%
Rent Income - General	\$ 4,800	\$ -	\$ -	\$ -	\$ -	\$ -	0%
Interest Income	\$ 1,327,929	\$ 875,000	\$ 750,000	\$ 500,000	\$ 450,000	\$ 450,000	
Other Non-Transp Revenue	\$ 269,279	\$ 136,000	\$ 170,000	\$ 175,100	\$ 180,353	\$ 185,764	3%
Sales Tax	\$ 17,652,773	\$ 17,624,453	\$ 17,712,575	\$ 17,889,701	\$ 18,426,392	\$ 18,979,184	2%
Transp Dev Act (TDA) Funds	\$ 6,165,834	\$ 6,362,036	\$ 6,247,519	\$ 6,309,995	\$ 6,499,294	\$ 6,694,273	2%
FTA Sec 5307 - Op Assistance	\$ 3,200,226	\$ 3,153,552	\$ 3,185,088	\$ 3,248,789	\$ 3,313,765	\$ 3,380,040	2%
Repay FTA Advance (5 years)	\$ 70,000	\$ (70,000)	\$ (70,000)	\$ (70,000)	\$ -	\$ -	0%
FTA Sec 5311 - Rural Op Asst	\$ 168,582	\$ 149,335	\$ 155,308	\$ 161,521	\$ 167,982	\$ 174,701	4%
Transfer from Capital/Proj Mgr	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4%
<b>SUBTOTAL REVENUE</b>	<b>\$ 36,835,469</b>	<b>\$ 36,644,493</b>	<b>\$ 36,806,025</b>	<b>\$ 37,153,064</b>	<b>\$ 38,269,068</b>	<b>\$ 39,399,937</b>	
<b>ANNUAL INCREASE</b>			<b>0.4%</b>	<b>0.9%</b>	<b>3.0%</b>	<b>3.0%</b>	
<b>ONE-TIME REVENUE</b>							
Carryover from Previous Year	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Transfer from Insurance Reserves	\$ -	\$ 30,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	
Transfer from Reserves		\$ 152,270					
FTA Sec 5317 - Op Assistance	\$ -	\$ 17,785	\$ -	\$ -	\$ -	\$ -	
AMBAG Funding (Intern & SRTP)	\$ 39,404	\$ 43,746	\$ -	\$ -	\$ -	\$ -	
<b>SUBTOTAL ONE-TIME REVENUE</b>	<b>\$ 39,404</b>	<b>\$ 243,801</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	
<b>TOTAL REVENUE</b>	<b>\$ 36,874,873</b>	<b>\$ 36,888,294</b>	<b>\$ 36,956,025</b>	<b>\$ 37,303,064</b>	<b>\$ 38,419,068</b>	<b>\$ 39,549,937</b>	

Table H-4: Projections Based on SCMTD TY 2009 Budget (as of March 28, 2008)

REVENUE SOURCE	YEAR END ACTUAL FY07	PROJ. YEAR END ACTUAL FY08	PROJ FY09	PROJ FY10	PROJ FY11	PROJ FY12	AVG. ANNUAL CHANGE FY09/ FY12
Passenger Fares	\$ 3,406,079	\$ 3,450,078	\$ 3,519,080	\$ 3,589,461	\$ 3,661,250	\$ 3,734,475	2%
Special Transit Fares	\$ 2,837,936	\$ 3,050,000	\$ 3,275,000	\$ 3,578,000	\$ 3,756,900	\$ 3,944,745	5%
Paratransit Fares	\$ 229,100	\$ 229,644	\$ 235,335	\$ 241,313	\$ 243,726	\$ 246,163	1%
Highway 17 Fares	\$ 818,902	\$ 842,000	\$ 852,000	\$ 877,000	\$ 903,310	\$ 930,409	3%
Highway 17 Payments	\$ 438,482	\$ 509,000	\$ 548,000	\$ 583,000	\$ 600,490	\$ 618,505	3%
Commissions	\$ 5,695	\$ 5,372	\$ 5,479	\$ 5,589	\$ 5,589	\$ 5,589	0%
Advertising Income	\$ 243,273	\$ 200,461	\$ 92,400	\$ 150,000	\$ 154,500	\$ 159,135	3%
Rent Income - SC Metro Center	\$ 85,935	\$ 81,803	\$ 83,030	\$ 84,275	\$ 85,961	\$ 87,680	2%
Rent Income - Watsonville TC	\$ 50,644	\$ 45,758	\$ 46,216	\$ 46,678	\$ 47,612	\$ 48,564	2%
Rent Income - General	\$ 4,800	\$ -	\$ -	\$ -	\$ -	\$ -	0%
Interest Income	\$ 1,327,929	\$ 875,000	\$ 335,000	\$ 325,000	\$ 450,000	\$ 450,000	
Other Non-Transp Revenue	\$ 269,279	\$ 136,000	\$ 132,000	\$ 132,000	\$ 135,960	\$ 140,039	3%
Sales Tax	\$17,652,773	\$ 17,624,453	\$ 17,682,614	\$ 18,213,092	\$ 18,759,485	\$ 19,322,269	3%
Transp Dev Act (TDA) Funds	\$ 6,165,834	\$ 6,362,036	\$ 6,249,168	\$ 6,436,643	\$ 6,629,742	\$ 6,828,635	3%
FTA Sec 5307 - Op Assistance	\$ 3,200,226	\$ 3,153,552	\$ 3,426,293	\$ 3,570,197	\$ 3,641,601	\$ 3,714,433	3%
Repay FTA Advance (5 years)	\$ (70,000)	\$ (70,000)	\$ (70,000)	\$ (70,000)	\$ -	\$ -	0%
FTA Sec 5311 - Rural Op Asst	\$ 168,582	\$ 149,335	\$ 161,615	\$ 168,403	\$ 175,139	\$ 182,145	4%
Transfer from Capital/Proj Mgr	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4%
<b>SUBTOTAL REVENUE</b>	<b>\$36,835,469</b>	<b>\$ 36,644,493</b>	<b>\$ 36,573,230</b>	<b>\$ 37,930,651</b>	<b>\$ 39,251,265</b>	<b>\$ 40,412,785</b>	
<b>ANNUAL INCREASE</b>			<b>-0.2%</b>	<b>3.7%</b>	<b>3.5%</b>	<b>3.0%</b>	
<b>ONE-TIME REVENUE</b>							
Carryover from Previous Year	\$ -	\$ -	\$ 2,000,000	\$ -	\$ -	\$ -	
Transfer from Insurance Reserves	\$ -	\$ 30,000	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	
Transfer from Reserves	\$ -	\$ 152,270	\$ 115,830	\$ 119,305	\$ -	\$ -	
FTA Sec 5317 - Op Assistance	\$ -	\$ 17,785	\$ -	\$ -	\$ -	\$ -	
AMBAG Funding (Intern & SRTP)	\$ 39,404	\$ 43,746	\$ -	\$ -	\$ -	\$ -	
<b>SUBTOTAL ONE-TIME REVENUE</b>	<b>\$ 39,404</b>	<b>\$ 243,801</b>	<b>\$ 2,265,830</b>	<b>\$ 269,305</b>	<b>\$ 150,000</b>	<b>\$ 150,000</b>	
<b>TOTAL REVENUE</b>	<b>\$36,874,873</b>	<b>\$ 36,888,294</b>	<b>\$ 38,839,060</b>	<b>\$ 38,199,956</b>	<b>\$ 39,401,265</b>	<b>\$ 40,562,785</b>	

Table H-5: Historic Budget Analysis

Revenue Sources	Adopted Budgets											Historic MTD Budgets		
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average Annual Growth Rates		
			Revised Budget	Feb Revised Budget	Revised Budget	Final Budget	Final	Revised	Final	Final	Adopted	10 years	5 years	3 years
Passenger Fares	\$2,874,886	\$3,058,053	\$3,199,146	\$3,106,966	\$3,051,780	\$3,856,173	\$3,897,107	\$3,574,868	\$3,578,745	\$3,650,320	\$3,450,078	1.8%	-2%	-1.2%
Special Transit Fares	\$1,547,052	\$1,653,000	\$1,605,319	\$1,823,327	\$1,782,662	\$1,645,252	\$2,166,861	\$2,414,780	\$2,488,779	\$2,588,330	\$2,823,253	6.2%	11%	5.3%
Paratransit Fares	\$162,000	\$200,000	\$262,000	\$228,770	\$240,000	\$360,000	\$324,000	\$295,500	\$240,000	\$249,600	\$249,600	4.4%	-7%	-5.5%
Highway 17 Fares		\$655,000	\$819,413	\$915,728	\$915,728	\$375,972	\$326,458	\$626,776	\$688,145	\$708,789	\$843,723		18%	10.4%
Highway 17 Payments								\$409,195	\$442,330	\$455,600	\$462,526			4.2%
Highway 17 VTA Payments						\$524,028	\$337,242							
Highway 17 AMTRAK Payments							\$370,000							
Purchased Transportation Revenue	\$700,291	\$140,309												
Commissions	\$9,000	\$9,000	\$11,000	\$12,000	\$10,000	\$9,200	\$7,400	\$6,000	\$6,000	\$6,000	\$6,000	-4.0%	-8%	0.0%
Advertising Income	\$100,000	\$134,000	\$158,000	\$174,000	\$138,000		\$45,000	\$50,000	\$120,000	\$120,000	\$145,000	3.8%		42.6%
Rent Income - SC Metro Center	\$63,157	\$63,800	\$84,000	\$89,658	\$92,000	\$93,691	\$95,745	\$93,903	\$83,373	\$85,040	\$85,040	3.0%	-2%	-3.3%
Rent Income - Watsonville TC	\$45,303	\$31,600	\$50,000	\$46,509	\$47,000	\$52,959	\$47,877	\$47,995	\$48,516	\$49,486	\$49,486	0.9%	-1%	1.0%
Rent Income - General	\$6,355	\$0	\$7,200	\$7,200	\$7,200	\$3,600	\$9,600	\$4,800	\$4,800	\$0	\$0	-100%	100%	-100%
Interest Income	\$550,000	\$770,000	\$1,171,249	\$737,000	\$508,000	\$300,000	\$288,400	\$428,000	\$960,000	\$1,008,000	\$1,076,000	6.9%	29%	36.0%
Other Non-Transportation Income	\$4,540	\$43,865	\$6,400	\$1,800	\$2,100	\$2,100	\$6,000	\$4,500	\$356,500	\$367,195	\$283,000		167%	297.7%
Sales Tax	\$12,734,000	\$13,900,000	\$16,128,000	\$15,290,422	\$15,154,578	\$15,759,000	\$15,377,900	\$15,839,237	\$16,640,983	\$17,306,622	\$17,624,453	3.3%	2%	3.6%
Sale of Assets	\$20,000	\$0												
Transportation Development Act Funds	\$4,605,126	\$4,674,062	\$5,760,322	\$5,767,827	\$5,134,522	\$5,392,889	\$5,413,251	\$5,677,686	\$5,880,834	\$6,116,067	\$6,362,037	3.3%	3%	3.9%
Special TDA Allocation	\$0	\$150,000	\$649,889	\$417,878					\$285,000	\$285,000				
Other Local Funding	\$425,000	\$0	\$30,000											
State Guideway Funding (PVEA, TCI)	\$425,000	\$450,000	\$450,000											
FTA Section 5303 - Strategic Implementation				\$35,000										
FTA Section 5303 - Custom Info Serv Plan				\$35,000										
FTA Section 5303 - SRTP, Studies	\$42,072	\$70,000	\$70,000											
FTA Section 5307 - Operating Assistance	\$505,614	\$505,614	\$505,614	\$1,229,934	\$2,075,729	\$2,804,435	\$2,950,231	\$3,091,556	\$3,130,496	\$3,287,021	\$3,247,000	20.4%	3%	1.6%

APPENDIX E: FINANCIAL TABLES

Adopted Budgets												Historic MTD Budgets		
	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average Annual Growth Rates		
Revenue Sources			Revised Budget	Feb Revised Budget	Revised Budget	Final Budget	Final	Revised	Final	Final	Adopted	10 years	5 years	3 years
Repay FTA Advance (5 years)								(\$70,000)	(\$70,000)	(\$70,000)	(\$70,000)			0.0%
FTA Section 5311 - Rural Operating Assistance	\$36,604	\$39,697	\$42,448	\$46,701	\$46,701	\$46,701	\$92,928	\$65,704	\$168,582	\$177,011	\$149,335	15.1%	26%	31.5%
Transfer from Capital/Proj Mgr				\$848,280		\$94,000	\$102,000	\$102,000	\$107,100	\$112,455	\$112,455			3.3%
<b>Subtotal Revenue Sources</b>	<b>\$19,571,771</b>	<b>\$20,841,638</b>	<b>\$25,124,122</b>	<b>\$24,739,209</b>	<b>\$23,215,830</b>	<b>\$24,558,575</b>	<b>\$24,436,332</b>	<b>\$25,341,381</b>	<b>\$27,722,184</b>	<b>\$28,849,897</b>	<b>\$29,069,806</b>	<b>4.0%</b>	<b>3.4%</b>	<b>4.7%</b>
<i>annual change</i>		6.5%	20.5%	-1.5%	-6.2%	5.8%	-0.5%	3.7%	9.4%	4.1%	0.8%			
<b>One Time Revenue Sources</b>														
FTA Sec 5317 - Op Assistance								\$0			\$17,785			
FTA Sec 5307 - One Time Advance							\$350,000							
Carryover of Paratransit Funding from Previous Year					\$100,000									
Carryover from Previous Year					\$450,000	\$950,000	\$800,000	\$935,500	\$649,817	\$681,462	\$911,228		-1%	-0.9%
Transfer from Reserves					\$1,200,000	\$350,000	\$0	\$335,000						
Transfer from Insurance Reserves				\$35,000	\$130,000	\$100,000	\$150,000	\$150,000	\$150,000	\$150,000	\$150,000		8%	0.0%
AMBAG Funding (Intern & SRTP)											\$100,000			
<b>Subtotal One Time Revenue Sources</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$35,000</b>	<b>\$1,880,000</b>	<b>\$1,400,000</b>	<b>\$1,300,000</b>	<b>\$1,420,500</b>	<b>\$799,817</b>	<b>\$831,462</b>	<b>\$1,179,013</b>		<b>-3%</b>	<b>-6.0%</b>
<i>annual change</i>		#DIV/0!	#DIV/0!	#DIV/0!	5271.4%	-25.5%	-7.1%	9.3%	-43.7%	4.0%	41.8%			
<b>Total Operating Revenue</b>	<b>\$19,571,771</b>	<b>\$20,841,638</b>	<b>\$25,124,122</b>	<b>\$24,739,209</b>	<b>\$23,215,830</b>	<b>\$24,558,575</b>	<b>\$24,436,332</b>	<b>\$25,341,381</b>	<b>\$27,722,184</b>	<b>\$28,849,897</b>	<b>\$29,069,806</b>	<b>4.0%</b>	<b>3%</b>	<b>4.7%</b>
<i>annual change</i>		6.5%	20.5%	-1.5%	-6.2%	5.8%	-0.5%	3.7%	9.4%	4.1%	0.8%			

Table H-6: METRO Year End Actuals\* (FY 2003-2008)

							Historic MTD Year End Actuals		
	2003	2004	2005	2006	2007	2008	Average Annual Growth Rates		
Operating Revenues							5 years	3 years	1 year
Passenger Fares	\$3,055,479	\$3,789,874	\$3,535,298	\$2,995,665	\$3,406,079	\$3,450,078	2.5%	-1%	1.3%
Special Transit Fares	\$1,837,234	\$2,180,107	\$2,285,492	\$2,029,724	\$2,837,936	\$3,050,000	10.7%	10%	7.5%
Paratransit Fares	\$210,280	\$278,588	\$243,553	\$223,860	\$229,100	\$229,644	1.8%	-2%	0.2%
Highway 17 Revenues	\$795,312	\$738,348	\$1,056,368	\$1,034,340	\$1,257,385	\$1,351,000	11.2%	9%	7.4%
Sales Tax	\$15,187,728	\$15,188,227	\$15,686,399	\$16,654,432	\$17,652,773	\$17,624,563	3.0%	4%	0.2%
Transportation Development Act Funds	\$5,134,522	\$5,337,724	\$5,413,251	\$5,740,612	\$6,165,834	\$6,362,036	4.4%	6%	3.2%
FTA Section 5307 - Operating Assistance	\$1,229,934	\$2,804,435	\$2,950,231	\$3,021,556	\$3,130,226	\$3,153,552	20.7%	2%	0.7%
<b>Subtotal Non-Operating Revenue</b>	<b>\$27,450,489</b>	<b>\$30,317,303</b>	<b>\$31,170,592</b>	<b>\$31,700,189</b>	<b>\$34,679,333</b>	<b>\$35,220,873</b>	<b>5.1%</b>	<b>4%</b>	<b>1.6%</b>
<i>annual change</i>		10.4%	2.8%	1.7%	3.1%	1.6%			

\* Review of historic year end actuals for operating revenues only focused on the key sources: Passenger fares, sales tax, TDA funds and Section 5307 funds. These sources provided approximately 82% of the agency’s operating revenue over the last 5 years.

Table H-7: Historic and Projected Sales Tax Revenue (FY 1998-2006)

	1998	1999	2000	2001	2002	2003	2004	2005	2006	8 years	5 years	3 years
										Growth Rates		
Projected Sales Tax Revenue	\$12,563,316	\$13,354,858	\$14,807,812	\$16,356,095	\$15,095,441	\$15,263,828	\$15,135,227	\$15,848,098	\$16,583,132	3.5%	0.3%	2.8%
Actual Sales Tax Revenue	\$12,734,000	\$13,900,000	\$16,128,000	\$15,290,422	\$15,154,578	\$15,759,000	\$15,377,900	\$15,839,237	\$16,640,983	3.4%	2.0%	1.8%
Difference	\$ (170,684)	\$ (545,142)	\$(1,320,188)	\$ 1,065,673	\$ (59,137)	\$ (495,172)	\$ (242,673)	\$ 8,861	\$ (57,851)			

**BEFORE THE BOARD OF DIRECTORS OF THE  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT**

Resolution No. \_\_\_\_\_  
On the Motion of Director: \_\_\_\_\_  
Duly Seconded by Director: \_\_\_\_\_  
The Following Resolution is Adopted

**RESOLUTION OF APPRECIATION  
FOR THE SERVICES OF KIRBY NICOL AS A MEMBER OF THE  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT BOARD OF DIRECTORS**

**WHEREAS**, the Santa Cruz Metropolitan Transit District was formed to provide public transportation to all of the residents of Santa Cruz County; and

**WHEREAS**, the City of Capitola, requiring strong representation, appointed Kirby Nicol as a member of the Board of Directors of the Santa Cruz Metropolitan Transit District; and

**WHEREAS**, Kirby Nicol served as a member of the Board of Directors from January 2006 through December 2008; and

**WHEREAS**, Kirby Nicol provided the Santa Cruz Metropolitan Transit District with strong leadership and insightful guidance during his term in the office; and

**WHEREAS**, during the time that Kirby Nicol served on the Board of Directors, the Transit District replaced a portion of the fixed route fleet, converted 40 buses from diesel to CNG, opened a new service/fueling facility, opened the first portion of the new maintenance facility, purchased new ParaCruz vans, improved the ParaCruz service, implemented wifi on the Highway 17 service, participated in the Transportation Funding Task Force, acquired funding for major capital improvements, and responded to a severe economic downturn; and

**WHEREAS**, the quality of public transit service in Santa Cruz County was improved dramatically as a result of the dedication, commitment and efforts of Kirby Nicol; and

**WHEREAS**, Kirby Nicol resigned as a Member of the Board of Directors in December 2008.

**NOW, THEREFORE, BE IT RESOLVED**, that the Board of Directors of the Santa Cruz Metropolitan Transit District does hereby commend Kirby Nicol for his efforts in the advancement of public transportation service in Santa Cruz County and expresses appreciation on behalf of itself, the Santa Cruz Metropolitan Transit District staff and all of the residents of Santa Cruz County.

**BE IT FURTHER RESOLVED**, that a copy of this resolution be sent to Kirby Nicol and that a copy of this resolution be entered into the official records of the Santa Cruz Metropolitan Transit District.

**PASSED AND ADOPTED** this 27th day of February 2009 by the following vote:

**AYES: Directors -**

**NOES: Directors -**

**ABSTAIN: Directors -**

**ABSENT: Directors -**

**APPROVED** \_\_\_\_\_

DENE BUSTICHI  
Board Chair

**ATTEST** \_\_\_\_\_

LESLIE R. WHITE  
General Manager

**APPROVED AS TO FORM:**

\_\_\_\_\_  
MARGARET GALLAGHER  
District Counsel

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 27, 2009  
**TO:** Board of Directors  
**FROM:** Angela Aitken, Finance Manager  
**SUBJECT: CONSIDERATION OF DECLINING A ONE-YEAR JOB ACCESS REVERSE COMMUTE (JARC) GRANT**

## I. RECOMMENDED ACTION

**That the Board of Directors decline a one-year Job Access Reverse Commute (JARC) grant.**

## II. SUMMARY OF ISSUES

- The Safe, Accountable, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) appropriated funds to the Department of Transportation for the Job Access Reverse Commute (JARC) program to provide public transportation funding assistance for low-income workers.
- In October, 2008, Caltrans awarded a grant to METRO for \$44,166 in JARC funds with a required local match of \$44,166 to operate a new transit service assisting low-income workers commuting from Watsonville to employment centers in Capitola and Santa Cruz.
- The current operating revenues preclude METRO from sustaining the new service without grant funds after the first year without cutting the new service.
- To avoid disadvantaging passengers who may be drawn to a new service only to have it terminated one year later due to a lack of funds, staff recommends that METRO not implement a new grant-funded service between Watsonville and Santa Cruz at this time.

## III. DISCUSSION

The Safe, Accountable, Efficient Transportation Equity Act: A Legacy for Users (SAFETEA-LU) appropriated federal funding to the Job Access Reverse Commute (JARC) program which provides grants to transit operators for new services benefitting low-income workers. The California Department of Transportation (Caltrans) administers the JARC program in California.

In October, 2008, Caltrans awarded a grant to METRO for \$44,166 in JARC funds with a required local match of \$44,166 to operate a new transit service assisting low-income workers commuting from Watsonville to employment centers in Capitola and Santa Cruz. This service would have provided approximately two round trips per day between Santa Cruz and Watsonville for one year. After the first year of grant-funded operating

assistance, METRO would operate the service from the same operating revenue which funds all other operating expenses.

METRO submitted the application for JARC assistance with the expectation that California's Transit Development Act funding and sales tax revenue would remain stable to support current operating levels. This is no longer the case. After the first year's grant-funded operation, METRO would have to either eliminate the new service or cut service elsewhere in the system to sustain it.

To avoid disadvantaging passengers who may be drawn to a new service only to have it terminated one year later due to a lack of funds, staff recommends that METRO not implement a new grant-funded service between Watsonville and Santa Cruz at this time. Within the context of the currently unpredictable amounts of operating revenue, METRO staff recommends that it would be better to maintain its current successful routes and provide viable service that would continue to be available for the future.

**V. FINANCIAL CONSIDERATIONS**

Declining the JARC award will enable METRO to use \$44,166 in required local sales tax revenue matching funds for existing operating expenses.

**V. ATTACHMENTS**

**None**

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

## STAFF REPORT

**DATE:** February 13, 2009

**TO:** Board of Directors

**FROM:** Margaret Gallagher, District Counsel

**SUBJECT: CONSIDERATION OF PROVIDING DIRECTION TO METRO STAFF REGARDING A BUS STOP BENCH AND/OR SHELTER DONATION PROGRAM INCLUDING ALLOWING DONORS TO PLACE THEIR NAMES OR BUSINESS LOGOS ON THE DONATED FACILITIES FOR PUBLIC RECOGNITION**

### ACTION REQUESTED AT THE FEBRUARY 13, 2009 BOARD MEETING

#### I. RECOMMENDED ACTION

**Provide Direction to METRO Staff regarding Bus Stop Bench and/or shelter Donation Program which authorizes Individuals, Organizations and/or Businesses to pay for these Facilities and allows the Donors to place their Names or Business Logos on the Facility for Public Recognition of the Donation.**

#### II. SUMMARY OF ISSUES

- Bus Benches and Shelters with seating are needed at various Bus Stops throughout METRO's fixed route service area to maintain a comfortable atmosphere at the bus stops and to protect METRO's passengers from inclement weather.
- A Bus Bench costs approximately \$500 plus installation costs. Bus Shelters generally cost approximately \$7,500 plus installation costs. Some Bus Stops require extensive renovations to the area in order to obtain compliance with the Americans With Disabilities Act before a shelter or bench can be put into place.
- A member of the public inquired of METRO staff whether METRO had a program that would allow an organization that she is affiliated with to pay for a bus bench or shelter in exchange for the organization's Logo being placed on the facility during the life of the bus bench/shelter.
- When METRO staff reviewed this inquiry, it was determined that there are some issues that need resolution before a program could be put into place. This Staff Report is designed to bring all issues related to this program forward for review and discussion so that a determination regarding the feasibility of such a program can be assessed.

### III. DISCUSSION

Bus benches and bus shelters with seating are needed at various bus stops for passenger comfort and to protect METRO's passengers from inclement weather. METRO's fixed route service utilizes approximately 1100 bus stops throughout its fixed route system. Over the years METRO has used State Transit Assistance (STA) funds to pay for bus benches and the bus shelters. With the state budget in disarray, METRO may want to look to other resources to promote its bus bench and bus shelter program.

METRO staff received an inquiry from a member of the public asking if an individual or organization paid the costs of a bus bench and/or shelter could their name or logo be placed on the facility to identify them as the donor. METRO staff informed the individual that METRO currently does not have such a program but that at a minimum the matter would have to be reviewed and approved by the METRO Board of Directors.

METRO staff inquired of other public agencies whether they have donation programs in which the Donor was publicly recognized. **Attachment A** sets forth the City of Santa Cruz's Parks and Recreation Department's Memorial Bench Program. Through this program, donors pay the Department \$1200 for the cost of the bench which includes freight and installation and pay for the engraving separately. The bus bench is maintained for its reasonable life expectancy. Arrangements are made through the Department for the exact location of the bench. Attachment B is the Scotts Valley Community Gift Program. This program includes a commemorative park amenities program to provide the community with a vehicle for commemorating deserving individuals. These individuals are honored through the purchase of park equipment that has been engraved with the honoree's name and placed within one of the parks or open space areas within Scotts Valley

Public Utilities Code Section 98233 authorizes METRO to accept gifts as follows:

The district may take by grant, purchase, gift, devise or lease, or condemn in proceedings under eminent domain, or otherwise acquire, and hold and enjoy, real and personal property of every kind within or without the district necessary to the full or convenient exercise of its powers.

Through the adoption of a Bus Bench/Shelter Donation Program, the Board of Directors would authorize METRO staff to facilitate a donation by individuals and businesses including nonprofit organizations for bus benches and bus stop shelters at specific locations throughout METRO's fixed route service area. In exchange for the donation, METRO would carve the individual or organizations' name into the bus bench or place the individuals name, business or organization's name or logo on the bus shelter for the life of these facilities. If an organization wants a particular stop to have their name on the shelter, as long as the contribution for the cost of a shelter was provided to METRO, the Donor would be able to select whatever shelter they wanted to have their name/logo placed on it on a first come first serve basis. The name/logo on a bus bench would be limited in scope to the back portion of the bench and have to be carved into the

wood frame of the bench. The name/logo placed on the bus stop shelter could be limited in size so as not to take up too much space on the shelter itself, for example, 6"x 6" in size.

#### **IV. FINANCIAL CONSIDERATIONS**

Adoption of this program would facilitate the purchase of bus benches and shelters without costs to METRO.

#### **V. ATTACHMENTS**

**Attachment A:** City of Santa Cruz Memorial Bench Program

**Attachment B:** Scotts Valley's Community Gift Program

# Attachment A



## ADMINISTRATIVE POLICY/PROCEDURE

Policy No 1 – 5 3

PARKS AND RECREATION DEPARTMENT

### SUBJECT: MEMORIAL BENCH PROGRAM

**POLICY:** To establish a procedure for the placement of Memorial benches in park facilities.

### PROCEDURE:

- 1) Customer requests information on purchasing a Memorial Bench.
- 2) Parks and Recreation Administration Office send an informational letter to the customer along with a list of available sites and a map of City parks. If the customer wishes to place a bench in an area that is currently full and has a waiting list, the customer may elect to be placed on a waiting list for contact when such site does become available. The waiting list is maintained by the site supervisor.
- 3) The customer is instructed to make contact by phone to the appropriate site supervisor to schedule a site meeting for approval of exact bench location. Upon agreement, the customer is referred to the Administration Office for payment and ordering of the bench. Administration receives payment from the customer (currently \$1,200) and writes a receipt recording the customer's name, phone number and bench location. A copy of the receipt is given to the appropriate site supervisor for their information.
- 4) Administration generates a purchase order to the bench vendor (8-10 weeks delivery time).
- 5) Once the bench is delivered to the Parks Yard, the customer is contacted by the site supervisor to arrange for engraving of the boards. The customer may arrange for private engraving or call the engraver (Gary of Surfside Signs, 475-9317). Payment of engraving is paid directly to the engraver by the customer. Placement of a plaque on a Memorial Bench is prohibited.
- 6) The engraver picks up the boards for engraving from the Parks Yard.
- 7) When the engraved boards are returned to the Parks Yard by the engraver, the customer is notified by the site supervisor and an installation date is agreed upon.
- 8) The Memorial Bench is installed as agreed between the customer and the site supervisor. The customer may attend during the installation.
- 9) One bench per site per family is allowed. Multiple placements at one site are allowed upon approval by the Director of Parks and Recreation.

#### Bench Models

- A. Dumor 88-60R, 6' Redwood bench with back, S-1, embedded, bronze frame
- B. Dumor 35-66R/6' Recycled plastic bench with back, S-1 embedded, cedar poly, bronze frame
- C. Dumor 35-66R/6' Redwood Bench with back, bronze frame, S-2 surface mount (Garfield)
- D. Dumor 98-63PL, 6' Recycled bench with back, S-2, 3 arms, cedar poly, bronze frame (Nearby Lagoon/ LaBarranca)
- E. Dumor 88-60PL, 6' Recycled plastic bench with back, S-2, surface mount, redwood poly, bronze frame, wharf

10.91

### Bench Locations

The following locations are available at this time (7/3/08). Individual sites and exact locations are to be determined by the Parks and Recreation Department. It may be determined by the City of Santa Cruz Parks and Recreation Department that a site has an adequate amount of Memorial Benches and is considered full.

### Neighborhood Parks

Central Park	Grant Street Park (play area)
Franks Park – full	Frederick Street Park (tot play area)
Mike Fox Park	Tyrell Park – full
Beach Flats Park	Bethany Curve Park
Derby Park	Garfield Park
Laurel Park	Oceanview Park – (play area)
Mission Plaza Park	Trescony Park/Gardens
University Terrace Park	Westlake Park
San Lorenzo Park	
West Cliff Drive – full	
East Cliff Drive – full	

### Regional Parks

Harvey West Park  
DeLaveaga Park  
George Washington Park (bocce courts)  
Nearby Lagoon Wildlife Refuge  
Municipal Wharf – full (call 420-6025 if interested in being placed on long-term list)

The Site Supervisors will update the above location list when a change exists and notify the Parks and Recreation Administration office.

### Memorial Bench Maintenance

The City of Santa Cruz will maintain the Memorial Bench for the reasonable life expectancy: Redwood benches last 5 years + and Recycled benches last 25 years+. The City of Santa Cruz will determine when the bench is no longer reasonable to maintain. The City of Santa Cruz will perform the following routine maintenance activities as determined necessary by Parks Division:

- ❖ Wash the bench
- ❖ Remove graffiti
- ❖ Replace broken, heavily splintered, or otherwise vandalized boards
- ❖ Mow turf or remove weed growth
- ❖ Resurface and reseal
- ❖ Touch up paint
- ❖ Secure loose boards

### Removal of Memorial Bench

When it is determined a Memorial Bench is no longer reasonable to maintain, the site supervisor will contact the purchasing customer by mail with notification of the impending removal. At that time, the customer may elect to purchase another Memorial Bench or relinquish the site, making it available to other customers.

Should it become necessary to permanently remove or relocate the Memorial Bench for any reason, the City of Santa Cruz will contact the purchasing customer by mail. If mail contact fails, the City will proceed with removal, thus making the site available to other customers.

323 Church Street, Santa Cruz, California 95060  
831-420-5270 • Fax 831-420-5271 • www.santacruzparksandrec.com

Thank you for your interest in the City of Santa Cruz Parks and Recreation Department's Memorial Bench Program.

You may wish to place your bench in one of our City parks or at Neary Lagoon. Please refer to Memorial Bench Program Policy/Procedure handout for available bench locations.

The price of a redwood or recycled plastic bench, including freight and installation is \$1,200. Engraving costs are separate and paid directly to Surfside signs (475-9317).

After meeting with the park supervisor and upon receipt of payment, a bench will be ordered and installed at your chosen location. Typically, this process takes approximately seven to nine weeks from date of order.

Bench locations are **not available** along West Cliff Drive, East Cliff Drive, Lighthouse Field, and the Municipal Wharf at this time. Currently, there is a long-term wait list for the Municipal Wharf.

The greenbelt areas, Pogonip, Arana Gulch, and Moore Creek, are **not** included in the Memorial Bench Program and have no Memorial Bench sites.

For further information, please call 831-420-5270.

Sincerely,

Parks and Recreation Department Staff

Enclosures: Memorial Bench Program Policy/Procedure  
Map of City Parks

10.24

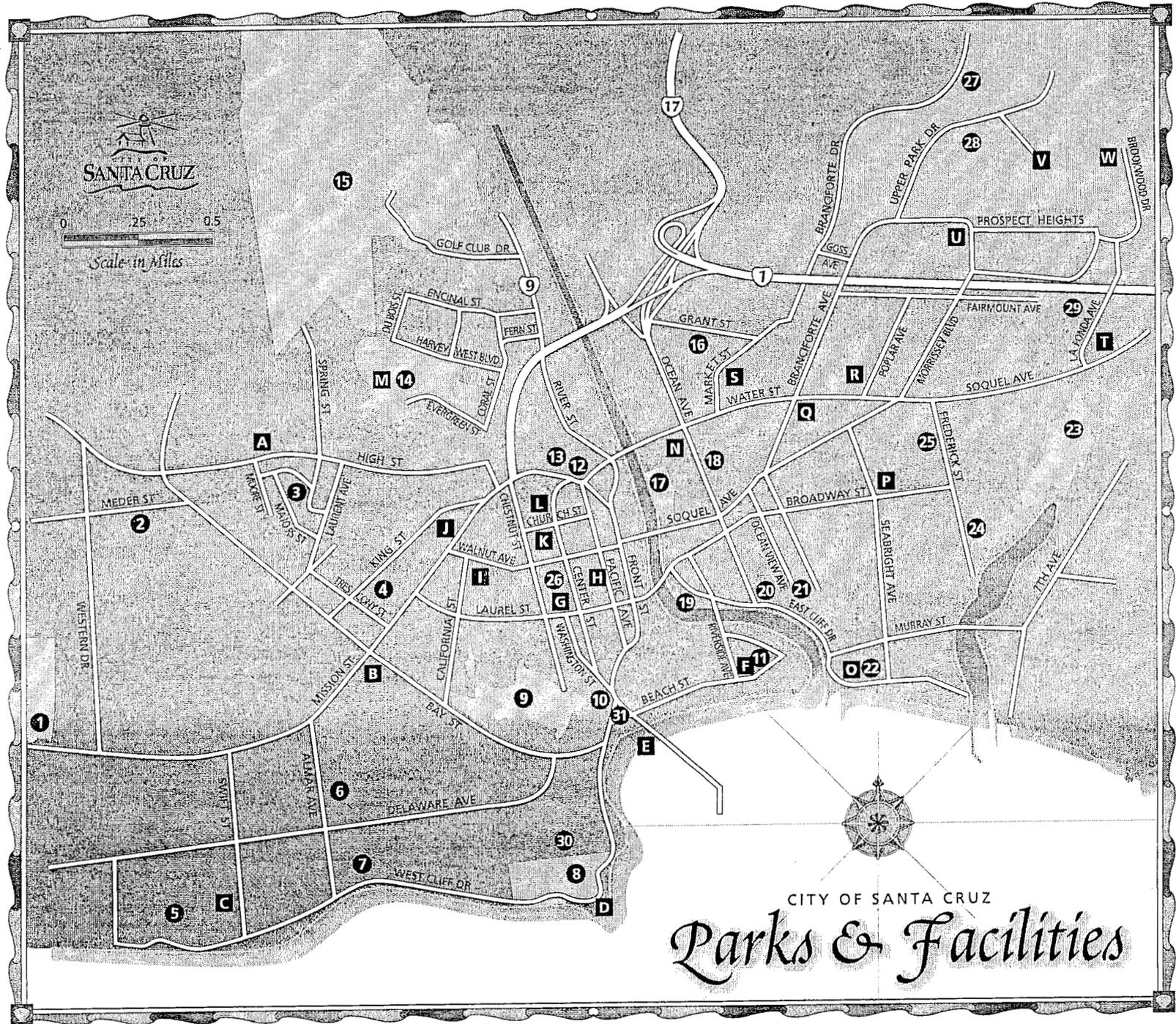
**PARKS**

- 1 Moore Creek Preserve 
- 2 University Terrace
- 3 Westlake
- 4 Trescony
- 5 Derby Skate Park
- 6 Garfield
- 7 Bethany
- 8 Lighthouse Field State Beach
- 9 Neary Lagoon Wildlife Refuge
- 10 Depot
- 11 Raymond Street
- 12 Town Clock
- 13 Mission Plaza
- 14 Harvey West
- 15 Pogonip 
- 16 Grant Street
- 17 San Lorenzo
- 18 Central
- 19 Ken Wormhoudt Skate Park/  
Roller Hockey Practice Area
- 20 Jessie Street Marsh
- 21 Ocean View
- 22 Tyrell
- 23 Arana Gulch 
- 24 Frederick Street
- 25 Star of the Sea
- 26 Laurel
- 27 DeLaveaga
- 28 DeLaveaga Golf Course
- 29 John Franks
- 30 Lighthouse Neighborhood
- 31 Santa Cruz Bike Park  
(temporary)

 greenbelt property

**FACILITIES**

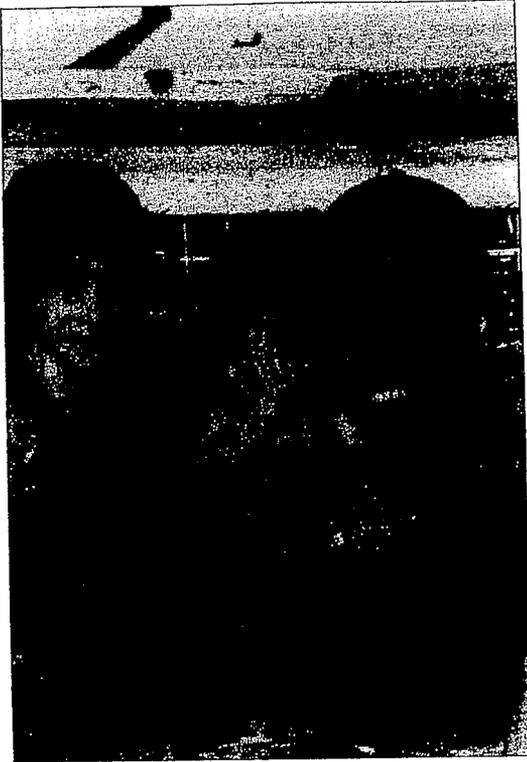
- A Westlake Elementary School
- B Bayview Elementary School
- C Natural Bridges Gym &  
Community Room
- D Surfing Museum
- E Municipal Wharf &  
Lifeguard Headquarters
- F Beach Flats Community Center
- G Louden Nelson Center
- H Pacific Avenue
- I Santa Cruz High School
- J Mission Hill Middle School
- K Civic Auditorium
- L City Hall
- M Harvey West Pool,  
Clubhouse & Scout House
- N County Building
- O Museum of Natural History
- P Gault Elementary School
- Q Branciforte Small Schools
- R Branciforte Middle School
- S Senior Citizens Opportunities
- T Harbor High School
- U DeLaveaga Elementary School
- V Stroke Center
- W Archery Range



CITY OF SANTA CRUZ  
*Parks & Facilities*

10.25

# Attachment B



*Introduction* **1**

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*About This Catalog* **2**

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*Tax Deductions* **3**

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*Gifts - By Price Range* **4**

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*Gifts - By Price Range* **5**

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*Gifts For Parks* **6**

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*Gifts For Programs* **7**

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*Order Form* **8**

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10. b1

## *Introduction*



The City of Scotts Valley's Community Gift Program presents exciting opportunities for you or your group to have a beneficial impact on our community's recreation and park resources. The City of Scotts Valley is a young community, with an even younger park system. With time Scotts Valley has seen a tremendous growth in the number of families in the community. With this increase has come the necessity to provide quality parks and recreation programs. This gift catalog will allow you to contribute toward Scotts Valley's future by helping you select a specific gift intended to support existing parks and their associated programs and also offers you a chance to contribute directly to future park development. Every item, no matter how large or small, will be appreciated. A single steelhead trout for our fishing park is every bit as essential as playground structures costing thousands of dollars. In addition, most of the items contained within can serve to commemorate deserving individuals or groups within the community.

Quality parks and recreation programs enhance our community and our lives. Parks serve to promote our physical and mental health by providing safe places to exercise and to escape the stresses of daily living. The natural and historic resources preserved within our parks benefit the education of children of all ages. In today's world, quality parks & recreation programs can help channel a child's natural curiosity and abundant energy toward healthy & constructive endeavors and away from the negative influences so readily available.

Thank you for your support!

## *How To Use This Catalog*



This catalog is intended to assist individuals, groups or businesses interested in contributing towards Scotts Valley's parks or recreation programs. You may also choose to contribute a portion of the cost towards a specific item, pool your resources with another individual or group or donate the actual item in lieu of contributing toward it. Gift items are listed in the following three sections (items may be listed in more than one section):

### **Section 5**

This section lists items in general categories by price.

### **Section 6**

Items in this section are intended for parks and are grouped together by type.

### **Section 7**

Section 7 lists items intended for recreation programs and are grouped together by type of program.

**To make a contribution,** simply fill out the enclosed order form, enclose a check or payment information and mail to the City of Scotts Valley Recreation Division, One Civic Center Drive, Scotts Valley, CA 95066. You may also contact the recreation division at 438-3251 and staff will be happy to assist you with the donation process.

### **Please note:**

1. All prices are approximate and are subject to change.
2. Some of the larger construction items may be subject to the City of Scotts Valley's design and approval process.

## *A Note Regarding Tax Deductions*



All items in this catalog are to be used exclusively for public purposes by the City of Scotts Valley and its employees. Donations of money or property qualify as charitable contributions under the United States Internal Revenue Code. According to the code (subject to certain limitations and requirements), contributions or gifts made by individuals or corporations to a political subdivision for its use are allowed as an itemized deduction in the taxable year in which the contribution or gift is made. For further details, ask the IRS for Publication S26 about charitable contributions and see your tax advisor.



Our commemorative park amenities program was created to provide the community with a vehicle for commemorating deserving individuals. These individuals are honored through the purchase of park equipment that has been engraved with the honoree's name and placed within one of the parks or open space areas within Scotts Valley.

### **How does the program work?**

Many of the gift items in this catalog are suitable to commemorate deserving individuals. These items may be purchased, engraved with the honoree's name, and installed at a predetermined location within one of the city's parks or open space areas.

### **Who may be honored?**

Any individual or group may be honored; there are no criteria to be met. (Please note that the use of this program for advertising purposes is prohibited.)

### **Who may honor someone?**

Any individual or group may participate.

### **What does it cost?**

Cost includes the park amenity, engraving and installation. A three-year maintenance program is included in the cost. Please contact the recreation division for a current price list.

### **Who selects the location?**

Individuals or groups will work with recreation division staff in selecting a site that is both beneficial to the city and to the individual purchasing the item.

**What can be engraved on the item?**

Only the individual or group's name may be placed on the item.

**What does the engraving look like?**

All letters are block style, 2 to 4 inches tall, and will be placed in a prominent position on the item. Lettering on smaller items will correspond to the size of the item.

Samples are available at the recreation division office.

**How do I utilize the program?**

Complete the application form and submit it to the City of Scotts Valley Recreation Division, One Civic Center Drive, Scotts Valley, Ca. 95066.

## Items By Price Range

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### \$ 5,001 and over

<u>Item</u>	<u>Price</u>	<u>Location</u>
Pool Complex	\$ 1,000,000 +	Location TBD
Gymnasium/Community Center	\$ 1,000,000 +	Location TBD
Athletic Field w/Lights	\$ 100,000 +	Skypark, Siltanen Park
Skypark Design		
Conceptual Plans	\$ 20,000 +	
Working Drawings	\$ 100,000 +	
Restrooms	\$ 75,000 +	Camp Evers Park
Restrooms	\$ 75,000 +	Hocus Pocus Park
Renovate Airport Offices	\$ 75,000 +	Skypark
Playground Structure	\$ 50,000 +	Siltanen Park, Skypark Hocus Pocus Park
Granite Creek Road Bicycle Stop	\$ 50,000 +	
Footbridge	\$ 30,000 +	MacDorsa Park
Restroom Upgrade	\$ 25,000 +	Siltanen Park
Gazebo	\$ 25,000 +	Hocus Pocus Park
Swings	\$ 20,000 +	Hocus Pocus Park
Mini Pickup Truck	\$ 11,000 +	Recreation Division
Community Art Project	T.B.A.	Any Park
Public Art at Skypark	T.B.A.	Skypark

### \$ 1,001 to \$ 5,000

<u>Item</u>	<u>Price</u>
Computer Upgrade (for division office)	\$ 5,000
Walk-behind Mower	\$ 5,000
Snow for Holiday Light Cruise	\$ 3,000
Fish for Camp Evers Fishing Park	\$ 1,500 +
Portable Scoreboard	\$ 1,500
Soccer Goals	\$ 1,500
20" Computer Monitor	\$ 1,500
Laminating Machine	\$ 1,400
Computer Desks	\$ 1,000

- ▶ All prices are approximate and are subject to change.
- ▶ Some of the larger construction items may be subject to the City of Scotts Valley's design & review process.

# Order Form

Date: \_\_\_\_\_  
 Name: \_\_\_\_\_  
 Business/Organization: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_  
 Home Phone: (    ) \_\_\_\_\_ Business Phone: (    ) \_\_\_\_\_  
 FAX: (    ) \_\_\_\_\_

I/We would like to make the following contributions:

Item	Page	Full Gift	Partial Gift	Amount
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
_____	_____	_____	_____	\$ _____
			Total:	\$ _____

I/We would like to make the following other contributions  
 (For gifts not indicated within this catalog)

\_\_\_\_\_  
 \_\_\_\_\_  
 Total: \$ \_\_\_\_\_

One or more of the above items are intended as a memorial gift:

Item: \_\_\_\_\_  
 Name to be engraved: \_\_\_\_\_  
 Item: \_\_\_\_\_  
 Name to be engraved: \_\_\_\_\_

## Payment Information

Check/Money Order (payable to: City of Scotts Valley)

VISA/MC

Account Number: \_\_\_\_\_  
 Expiration Date: \_\_\_\_\_

Please return completed application to: City of Scotts Valley, One Civic Center Drive, Scotts Valley, CA. 95066, (408) 438-3251.

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** February 13, 2009

**TO:** Board of Directors

**FROM:** Angela Aitken, Finance Manager  
Terry Gale, Information Technology Manager

**SUBJECT: CONSIDERATION OF AWARD OF CONTRACT WITH JABICO ENTERPRISES, LLC FOR WEB SITE RE-DESIGN AND IMPLEMENTATION SERVICES AND APPROVAL OF CONTRACT CHANGE ORDER PROCEDURES**

## ACTION REQUESTED AT THE FEBRUARY 13, 2009 BOARD MEETING

### I. RECOMMENDED ACTION

**That the Board of Directors authorize the General Manager to execute a contract with - Jabico Enterprises, LLC for web site re-design and implementation services for an amount not to exceed \$43,100 and to approve contract change order procedures.**

### II. SUMMARY OF ISSUES

- METRO requires the services of a web site design firm to re-design METRO's web site to be compliant the Americans with Disabilities Act (ADA), be bilingual, and be database driven to allow METRO departments to publish and maintain their own content, and keep visual presentation uniform throughout the web site.
- A competitive procurement was conducted to solicit proposals from qualified firms.
- Twelve firms submitted proposals for METRO's review.
- A four-member evaluation committee comprised of METRO staff reviewed and evaluated the proposals.
- The top two ranked firms were interviewed by the evaluation committee.
- Staff is recommending that a contract be established with Jabico Enterprises, LLC for web site re-design and implementation services for an amount not to exceed \$43,100.
- Staff is recommending that the Board of Directors approve contract change order procedures as provided in this report.

### III. DISCUSSION

METRO requires the services of a web site design firm to re-design METRO's web site to be compliant the Americans with Disabilities Act (ADA), be bilingual, and be database driven to allow METRO departments to publish and maintain their own content, and keep visual presentation uniform throughout the web site.

On December 3, 2008, METRO Request for Proposal No. 09-04 was mailed to one hundred and five (105) firms, was legally advertised, and a notice was posted on METRO's web site. On January 5, 2009, proposals were received and opened from twelve firms. A list of these firms are provided in Attachment A. A four-member evaluation committee comprised of METRO staff (Terry Gale Information Technology Manager, Harlan Glatt Sr. Database Administrator, Isaac Holly Sr. Systems Administrator, and Frank Cheng MetroBase Project Manager) have reviewed and evaluated the proposals.

The evaluation committee used the following criteria as contained in the Request for Proposals:

<b>Evaluation Criteria</b>	<b>Points</b>
Responsiveness to Project scope and Schedule	35 points
Previous Web Design experience and work examples	25 points
References	20 Points
Cost	15 Points
DBE Participation	5 Points
<b>Total Points Possible</b>	<b>100 Points</b>

The top two firms were interviewed and a final recommendation was determined.

A budget of \$75,000 is in the FY09 budget to incorporate different components of the web page project including the web page redesign contract and any change orders associated with this contract. Possible change orders include: enhancements that were not originally required; possible cost of focus group testing; enhancements from focus group testing; third party Joomla enhancements; email subscription management; and additional costs for web site modifications at METRO's request.

Staff is recommending that a contract be established with Jabico Enterprises, LLC for web site re-design and implementation services for an amount not to exceed \$43,100. Contractor will provide all services meeting all METRO specifications and requirements.

Staff is recommending that the Board of Directors approve the following contract change order procedures that will apply to this contract:

1. For any change order request from the contractor that exceeds \$25,000, staff will review and present to the Board of Directors for approval.

2. For any change order request from the contractor that is less than \$25,000, staff will review and approval of the change order will require approval from the following personnel:  
Leslie R. White, General Manager  
Terry Gale, Information Technology Manager  
Frank Cheng, MetroBase Project Manager
3. Staff shall report every month to the Board of Directors on all change orders processed for this contract.

#### **IV. FINANCIAL CONSIDERATIONS**

Funds to support this contract are included in the Administration Department FY09 Professional/Technical Fees budget (503031).

#### **V. ATTACHMENTS**

**Attachment A:** Ranking of Proposals Submitted

**Attachment B:** Contract with Jabico Enterprises, LLC

Prepared By: Lloyd Longnecker, Purchasing Agent

**Note: The RFP along with its Exhibits and any Addendum(s) are available for review at the Administration Office of METRO or online at [www.scmtd.com](http://www.scmtd.com)**

# Attachment A

RFP No. 09-04 For Web Site Redesign and Implementation Services

## Final Ranking of Proposals Received

1. Jabico Enterprises of Santa Cruz, California
2. Monarch Media, Inc. of Santa Cruz, California
3. Active Data Exchange of Bethlehem, Pennsylvania
4. Conscious Creative Services of Berkeley, California
5. CJ Design of Santa Cruz, California
6. ITLogy LLC of Amherst, New York
7. Van der Wyk of Santa Cruz, California
8. Computer Presentation Systems, Inc. of Rancho Cordova, California
9. Fluid Design of Santa Monica, California
10. BCT Consulting of Clovis, California
11. Thinktiv, Inc. of Austin, Texas
12. Renegade Systems of Arlington, Virginia

# Attachment B

## CONTRACT FOR WEB SITE DESIGN AND IMPLEMENTATION (09-04)

THIS CONTRACT is made effective on March 1, 2009 between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT, a political subdivision of the State of California ("METRO"), and JABICO ENTERPRISES, LLC ("Contractor").

### 1. RECITALS

#### 1.01 METRO's Primary Objective

METRO is a public entity whose primary objective is providing public transportation and has its principal office at 370 Encinal Street, Suite 100, Santa Cruz, California 95060.

#### 1.02 METRO's Need for Web Site Design and Implementation Services

METRO has the need for Web Site Design and Implementation Services. In order to obtain these services, METRO issued a Request for Proposals, dated December 3, 2008, setting forth specifications for such services. The Request for Proposals is attached hereto and incorporated herein by reference as Exhibit "A".

#### 1.03 Contractor's Proposal

Contractor is a firm/individual qualified to provide Web Site Design and Implementation Services and whose principal place of business is 505 River Street, Suite A, Santa Cruz, California. Pursuant to the Request for Proposals by METRO, Contractor submitted a proposal for Web Site Design and Implementation Services, which is attached hereto and incorporated herein by reference as Exhibit "B."

#### 1.04 Selection of Contractor and Intent of Contract

On February 13, 2009, METRO selected Contractor as the offeror whose proposal was most advantageous to METRO, to provide Web Site Design and Implementation Services described herein. This Contract is intended to fix the provisions of these services.

METRO and Contractor agree as follows:

### 2. INCORPORATED DOCUMENTS AND APPLICABLE LAW

#### 2.01 Documents Incorporated in this Contract

The documents below are attached to this Contract and by reference made a part hereof. This is an integrated Contract. This writing constitutes the final expression of the parties' contract, and it is a complete and exclusive statement of the provisions of that Contract, except for written amendments, if any, made after the date of this Contract in accordance with Section 13.14.

##### A. Exhibit "A"

Santa Cruz Metropolitan Transit District's "Request for Proposals" dated December 3, 2008 including Addendum No. 1 dated January 16, 2009.

##### B. Exhibit "B" (Contractor's Proposal)

Contractor's Proposal to METRO for Web Site Design and Implementation Services, signed by Contractor and dated January 5, 2009.

2.02 Conflicts

Where in conflict, the provisions of this writing supersede those of the above-referenced documents, Exhibits "A" and "B". Where in conflict, the provisions of Exhibit "A" supercede Exhibit "B".

2.03 Recitals

The Recitals set forth in Article 1 are part of this Contract.

3. DEFINITIONS

3.01 General

The terms below (or pronouns in place of them) have the following meaning in the contract:

3.01.01 CONTRACT - The Contract consists of this document, the attachments incorporated herein in accordance with Article 2, and any written amendments made in accordance with Section 13.14.

3.01.02 CONTRACTOR - The Contractor selected by METRO for this project in accordance with the Request for Proposals issued December 3, 2008.

3.01.03 CONTRACTOR'S STAFF - Employees of Contractor.

3.01.04 DAYS - Calendar days.

3.01.05 OFFEROR - Contractor whose proposal was accepted under the terms and conditions of the Request for Proposals issued December 3, 2008.

3.01.06 PROVISION - Any term, agreement, covenant, condition, clause, qualification, restriction, reservation, or other stipulation in the contract that defines or otherwise controls, establishes, or limits the performance required or permitted by either party.

3.01.07 SCOPE OF WORK (OR "WORK") - The entire obligation under the Contract, including, without limitation, all labor, equipment, materials, supplies, transportation, services, and other work products and expenses, express or implied, in the Contract.

4. TIME OF PERFORMANCE

4.01 Term

The term of this Contract will be for a period not to exceed one (1) year and shall commence upon the issuance of the contract by METRO .

At the option of METRO, extended upon mutual written consent.

5. COMPENSATION

5.01 Terms of Payment

METRO shall compensate Contractor in an amount not to exceed the amounts/rates agreed upon by

METRO. METRO shall reasonably determine whether work has been successfully performed for purposes of payment. Compensation shall be made within thirty (30) days of METRO written approval of Contractor's written invoice for said work. Contractor understands and agrees that if he/she exceeds the \$43,100 maximum amount payable under this contract, that it does so at its own risk.

5.02 Invoices

Contractor shall submit invoices with a purchase order number provided by METRO on a monthly basis. Contractor's invoices shall include detailed records showing actual time devoted, work accomplished, date work accomplished, personnel used, and amount billed per hour. Expenses shall only be billed if allowed under the Contract. Telephone call expenses shall show the nature of the call and identify location and individual called. Said invoice records shall be kept up-to-date at all times and shall be available for inspection by METRO (or any grantor of METRO, including, without limitation, any State or Federal agency providing project funding or reimbursement) at any time for any reason upon demand for not less than four (4) years after the date of expiration or termination of the Contract. Under penalty of law, Contractor represents that all amounts billed to METRO are (1) actually incurred; (2) reasonable in amount; (3) related to this Contract; and (4) necessary for performance of the project.

6. NOTICES

All notices under this Contract shall be deemed duly given upon delivery, if delivered by hand; or three (3) days after posting, if sent by registered mail, receipt requested; to a party hereto at the address hereinunder set forth or to such other address as a party may designate by notice pursuant hereto.

METRO

Santa Cruz Metropolitan Transit District  
370 Encinal Street  
Suite 100  
Santa Cruz, CA 95060  
Attention: General Manager

CONTRACTOR

Jabico Enterprises, LLC  
505 River Street  
Suite A  
Santa Cruz CA 95060  
Attention: President

7. AUTHORITY

Each party has full power and authority to enter into and perform this Contract and the person signing this Contract on behalf of each has been properly authorized and empowered to enter into this Contract. Each party further acknowledges that it has read this Contract, understands it, and agrees to be bound by it.

Signed on \_\_\_\_\_

METRO  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

\_\_\_\_\_  
Leslie R. White  
General Manager

CONTRACTOR  
JABICO ENTERPRISES, LLC

By \_\_\_\_\_  
Gary Herman  
President

Approved as to Form:

\_\_\_\_\_  
Margaret Rose Gallagher  
District Counsel

# **SANTA CRUZ METROPOLITAN TRANSIT DISTRICT**

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## **Request for Proposals (RFP)**

**For Web Site Redesign and Implementation**

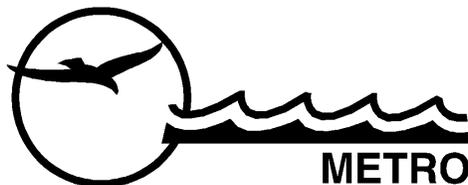
**District RFP No. 09-04**

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**Date Issued: December 3, 2008**

**Proposal Deadline: 5:00 P.M., January 5, 2009**

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### **Contents of this RFP**

Part I.	Instructions to Offerors
Part II.	General Information Form
Part III.	Specifications
Part IV.	General Conditions
Part V.	Contract/Agreement
Part VI.	FTA Requirements for Non-Construction Contracts
Part VII.	Protest Procedures
Attachment A	Comparing Joomla and Other Content Management Systems

## **PART I**

### **INSTRUCTIONS TO OFFERORS**

1. **GENERAL:** These instructions form a part of the contract documents and shall have the same force as any other portion of the contract. Failure to comply may subject the proposal to immediate rejection.
2. **OFFEROR RESPONSIBILITY:** The District has made every attempt to provide all information needed by offerors for a thorough understanding of project terms, conditions, and requirements. It is expressly understood that it is the responsibility of offerors to examine and evaluate the work required under this RFP and the terms and conditions under which the work is performed. By submitting a proposal, Offeror represents that it has investigated and agrees to all terms and conditions of this RFP.
3. **DELIVERY OF PROPOSALS TO THE DISTRICT:** Proposals (1 original and 4 copies) must be delivered to the District Purchasing Office, 110 Vernon Street, Suite B, Santa Cruz, California, 95060 on or before the deadline noted in the RFP.

Any contract or purchase order entered into as a result of this RFP shall incorporate the RFP and the proposal submitted by successful offeror. In the event of conflict between the proposal and any other contract document, the other contract document shall prevail unless specified otherwise by the District. Telephone or electronic proposals will not be accepted.

4. **LATE PROPOSALS:** Proposals received after the date and time indicated herein shall not be accepted and shall be returned to the Offeror unopened.

Requests for extensions of the proposal closing date or time will not be granted. Offerors mailing proposals should allow sufficient mail time to ensure timely receipt of their proposals before the deadline, as it is the offerors responsibility to ensure that proposals arrive before the closing time.

5. **MULTIPLE PROPOSALS:** An offeror may submit more than one proposal. At least one of the proposals shall be complete and comply with all requirements of this RFP. However, additional proposals may be in abbreviated form, using the same format, but providing only the information that differs in any way from the information contained in the master proposal. Master proposals and alternate proposals should be clearly labeled.
6. **PARTIAL PROPOSALS:** No partial proposals shall be accepted.
7. **WITHDRAWAL OR MODIFICATION OF PROPOSALS:** Proposals may not be modified after the time and date proposals are opened. Proposals may be withdrawn by Offeror before proposal opening upon written request of the official who is authorized to act on behalf of the Offeror.
8. **CHANGES TO THE RFP RECOMMENDED BY OFFERORS:** All requests for clarification or modification of the RFP shall be made in writing. Offerors are required to provide the value of each proposed modification and a brief explanation as to why the change is requested. Value shall be defined as the cost or savings to the District and the advantage to the District of the proposed change.
9. **ADDENDA:** Modifications to this RFP shall be made only by written addenda issued to all RFP holders of record. Verbal instructions, interpretations, and changes shall not serve as official expressions of the District, and shall not be binding. All cost adjustments or other changes resulting from said addenda shall be taken into consideration by offerors and included in their proposals.
10. **OFFEROR'S PROPOSAL TO THE DISTRICT:** Offerors are expected to thoroughly examine the scope of work and terms and conditions of the RFP. Offerors' terms, conditions, and prices shall constitute a firm offer to the District that cannot be withdrawn by the Offeror for ninety (90) calendar days after the closing date for

proposals, unless a longer time period is specified by the District in the RFP. Offerors shall identify all proprietary information in their proposals. Information identified as proprietary shall not be made available to the public or other offerors.

11. **SINGLE OFFEROR RESPONSIBILITY:** Single Offeror responsibility is required under this RFP. Each Offeror responding to this RFP must respond to all professional services and provide all materials, equipment, supplies, transportation, freight, special services, and other work described or otherwise required herein.
12. **EXPERIENCE AND QUALIFICATIONS:** Offeror may be required upon request of the District to substantiate that Offeror and its proposed subcontractors have the skill, experience, licenses, necessary facilities, and financial resources to perform the contract in a satisfactory manner and within the required time.
13. **SUBCONTRACTING:** The requirement for single-point responsibility does not prohibit subcontracts or joint ventures provided that the single successful Offeror assumes the following responsibilities: (1) serves as the sole general contractor with the District; (2) assumes full responsibility for the performance of all its subcontractors, joint venturers, and other agents; (3) provides the sole point of contact for all activities through a single individual designated as project manager; (4) submits information with its proposal documenting the financial standing and business history of each subcontractor or joint venturer; and, (5) submits copies of all subcontracts and other agreements proposed to document such arrangement.

Without limiting the foregoing, any such legal documents submitted under item "5" above must (a) make the District a third-party beneficiary thereunder; (b) grant to the District the right to receive notice of and cure any default by the successful offeror under the document; and (c) pass through to the District any and all warranties and indemnities provided or offered by the subcontractor or similar party.

14. **EVALUATION CRITERIA AND AWARD OF CONTRACT:** The award of the contract will be made to the responsible Offeror whose proposal is most advantageous to the District. Specific evaluation criteria are identified in the Specifications section of the RFP.
15. **DISTRICT'S PREROGATIVE:** The District reserves the right to contract with any single firm or joint venture responding to this RFP (without performing interviews), based solely upon its evaluation and judgment of the firm or joint venture in accordance with the evaluation criteria. This RFP does not commit the District to negotiate a contract, nor does it obligate the District to pay for any costs incurred in preparation and submission of proposals or in submission of a contract.

The District reserves and holds at its discretion the following rights and options in addition to any others provided by the Public Utility Code, Section 98000 and the Public Contract Code: (1) to reject any or all of the proposals; (2) to issue subsequent requests for proposals; (3) to elect to cancel the entire request for proposals; (4) to waive minor informalities and irregularities in proposals received; (5) to enter into a contract with any combination of one or more prime contractors, subcontractors, or service providers; (6) to approve or disapprove the use of proposed subcontractors and substitute subcontractors; (7) to negotiate with any, all, or none of the respondents to the RFP.

16. **EXECUTION OF CONTRACT:** The final contract shall be executed by the successful offeror and returned to the District Administrative Office no later than ten (10) calendar days after the date of notification of award by the District. All required bonds and insurance certificates shall also be submitted by this deadline. In the event successful offeror does not submit any or all of the aforementioned documents on or before the required deadline, the District may award the contract to another offeror; in such event, District shall have no liability and said party shall have no remedy of any kind against the District.
17. **DISADVANTAGED AND WOMEN'S BUSINESS ENTERPRISES:** The Board of Directors of the Santa Cruz Metropolitan Transit District has adopted a Disadvantaged Business Enterprise Policy to promote the participation of disadvantaged business enterprises (DBE) in all areas of District contracting to the maximum extent practicable. Consistent with the DBE Policy, the successful offeror selected for this project shall take all necessary and reasonable steps to ensure that DBE firms have the maximum practicable opportunity to participate in the performance of this project and any subcontracting opportunities thereof.

18. NONDISCRIMINATION: The Santa Cruz Metropolitan Transit District will not discriminate with regard to race, color, creed, ancestry, national origin, religion, sex, sexual preference, marital status, age, medical condition or disability in the consideration for award of contract.

***ADDITIONAL INSTRUCTIONS TO OFFERORS ARE SET FORTH IN  
OTHER SECTIONS OF THIS REQUEST FOR PROPOSALS***



Listing of major sub consultants proposed (if applicable), their phone numbers, and areas of responsibility (indicate which firms are DBE's):

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**CERTIFICATION OF PROPOSED CONTRACTOR REGARDING DEBARMENT,  
SUSPENSION AND OTHER INELIGIBILITY AND VOLUNTARY EXCLUSION**

(Contractor) \_\_\_\_\_ certifies to the best of its knowledge and belief, that it and its principals:

Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency;

Have not within a three year period preceding this bid been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;

Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and

Have not within a three year period preceding this bid had one or more public transactions (Federal, State or local) terminated for cause or default.

If the Proposed Subcontractor is unable to certify to any of the statements in this certification, it shall attach an explanation to this certification.

(Contractor) \_\_\_\_\_, CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET. SEQ. ARE APPLICABLE THERETO.

\_\_\_\_\_  
Signature and Title of Authorized Official

**LOBBYING CERTIFICATION**  
**(Only for Contracts above \$100,000)**

**Lobbying Certification for Contracts Grants, Loans and Cooperative Agreements (Pursuant to 49 CFR Part 20, Appendix A)**

The undersigned certifies, to the best of his or her knowledge and belief, that:

- (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal Contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal Contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for making lobbying contacts to an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal Contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form--LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions and as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96).
- (3) The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts, sub grants, and Contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The Bidder/Offeror certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Bidder/Offeror understands and agrees that the provisions of 31 U.S.C. A 3801, et. seq. apply to this certification and disclosure, if any.

Firm Name \_\_\_\_\_

Signature of Authorized Official \_\_\_\_\_

Name and Title of Authorized Official \_\_\_\_\_

Date \_\_\_\_\_

**BUY AMERICA CERTIFICATION**  
**(Only for Contracts above \$100,000)**

This procurement is subject to the Federal Transit Administration Buy America Requirements in 49 CFR part 661.

A Buy American Certificate, as per attached format, must be completed and submitted with the bid. A bid which does not include the certificate will be considered non-responsive.

A false certification is a criminal act in violation of 18 U.S.C. 1001. Should this procurement be investigated, the successful bidder/proposer has the burden of proof to establish that it is in compliance.

A waiver from the Buy America Provision may be sought by SCMTD if grounds for the waiver exist.

Section 165(a) of the Surface Transportation Act of 1982 permits FTA participation on this contract only if steel and manufactured products used in the contract are produced in the United States.

**BUY AMERICA CERTIFICATE**

The bidder hereby certifies that it will comply with the requirements of Section 165(a) or (b) (3) of the Surface Transportation Assistance Act of 1982, and the applicable regulations in 49 CFR Part 661.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Company Name: \_\_\_\_\_

Title: \_\_\_\_\_

OR

The bidder hereby certifies that it cannot comply with the requirements of Section 165(a) or (b) (3) of the Surface Transportation Act of 1982, but may qualify for an exception to the requirement pursuant to Section 165(b)(2) or (b)(4) of the Surface Transportation Assistance Act of 1982, as amended, and regulations in 49 CFR 661.7.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Company Name: \_\_\_\_\_

Title: \_\_\_\_\_

# CONTRACTOR DBE INFORMATION

CONTRACTOR'S NAME \_\_\_\_\_ CONTRACTOR'S ADDRESS \_\_\_\_\_  
 DBE GOAL FROM CONTRACT \_\_\_\_\_ % \_\_\_\_\_  
 FED. NO. \_\_\_\_\_  
 COUNTY \_\_\_\_\_ PROPOSAL AMOUNT \$ \_\_\_\_\_  
 AGENCY \_\_\_\_\_ PROPOSAL OPENING DATE \_\_\_\_\_  
 CONTRACT NO. \_\_\_\_\_ DATE OF DBE CERTIFICATION \_\_\_\_\_  
 SOURCE \*\* \_\_\_\_\_

This information must be submitted during the initial negotiations with the District. By submitting a proposal, offeror certifies that he/she is in compliance with the District's policy. Failure to submit the required DBE information by the time specified will be grounds for finding the proposal non-responsive.

CONTRACT ITEM NO.	ITEM OF WORK AND DESCRIPTION OF WORK OR SERVICES TO BE SUBCONTRACTED OR MATERIALS TO BE PROVIDED *	CERTIFICATION FILE NUMBER	NAME OF DBE	DOLLAR AMOUNT DBE ***	PERCENT DBE

TOTAL CLAIMED DBE  
 PARTICIPATION \$ \_\_\_\_\_ %

\_\_\_\_\_  
SIGNATURE OF CONTRACTOR

\_\_\_\_\_  
DATE

\_\_\_\_\_  
AREA CODE/TELEPHONE

(Detach from proposal if DBE information is not submitted with proposal.)

\* If 100% of item is not to be performed or furnished by DBE, describe exact portion, including plan location of work to be performed, of item to be performed or furnished by DBE.

\*\* DBE's must be certified on the date proposals are opened.

\*\*\* Credit for a DBE supplier who is not a manufacturer is limited to 60% of the amount paid to the supplier.

**NOTE:** Disadvantaged business must renew their certification annually by submitting certification questionnaires in advance of expiration of current certification. Those not on a current list cannot be considered as certified.

# CONTRACTOR DBE INFORMATION

CONTRACT ITEM NO.	ITEM OF WORK AND DESCRIPTION OF WORK OR SERVICES TO BE SUBCONTRACTED OR MATERIALS TO BE PROVIDED *	CERTIFICATION FILE NUMBER	NAME OF DBE	DOLLAR AMOUNT DBE ***	PERCENT DBE
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TOTAL CLAIMED DBE  
PARTICIPATION      \$ \_\_\_\_\_      \_\_\_\_\_ %

## PART III

### SPECIFICATIONS FOR WEBSITE DESIGN AND IMPLEMENTATION

#### 1. Introduction

The Santa Cruz Metropolitan Transit District (Metro) is requesting proposals from qualified firms to develop and implement an Americans with Disabilities Act (ADA) compliant, bilingual (English/Spanish), database-driven web site based on the widely used Joomla Content Management System (CMS - See attachment A). Use of a CMS will allow departments to publish and maintain their own content (without the webmaster as intermediary), and keep the visual presentation uniform throughout the site. New content features can easily be added to the site framework with less work.

#### 2. Scope Of Work

The selected firm shall design, configure and implement a Joomla based web site, after meeting with Metro staff to outline all requirements including but not limited to; site theme, content organization, migration of existing content, component/module customization requirements, and staff training on administration of the new site. Source code for all customized components implemented will be owned by Metro for the purpose of extending or modifying the functionality.

The term of this contract is for 6 months from the notice to proceed, including a maximum of 2 months to attain acceptance of the website development and implementation. Prior to completion, Metro shall conduct focus group testing of the draft site on a cross section of transit-users & non-transit users (e.g. non-residents, commuters, students, elderly, Spanish speakers, etc.) to verify usability and accessibility, which will determine the final requirements for project signoff.

#### Design Requirements:

##### 2.1 Visual Design Elements

- Reorganize existing content into sections and categories
- Menu organization with visible second-level navigation links and *breadcrumbs*
- Presentation template featuring Metro color scheme with white or pale-blue background, suitable graphic elements, cascading style sheets (CSS), and Joomla 1.5 standards.
- Deliver updated rendition of the Metro logo
- Rotating banner of Santa Cruz ocean and mountain themed scenery and text caption (provide 4-6 royalty-free photos to launch, with capability to add more)

##### 2.2 Accessibility/Usability

Site design shall contain facility for the disabled community adhering to ADA (<http://www.ada.gov/pcatoolkit/chap5toolkit.html>) and the Web Accessibility Initiative's (WAI) latest standards as outlined by the W3C (<http://www.w3.org/WAI/>). The site shall be able to accommodate common forms of assistive technology such as text readers that rely on adherence to these standards. Major site navigation shall be reproduced as text links in the footer. Site shall contain embedded controls for font size (large, medium, small). Site shall be tested for cross-browser compatibility.

##### 2.3 Bilingual

Site content and menu shall be published in selectable modes for English and Spanish. Proposals shall offer recommendations regarding the merits and costs of the types of components available, from automatic software translation to manual dual-mode publishing, and hybrid approaches. The selected firm shall assist in the selection of the best-of-breed Joomla multilingual components.

## 2.4 Trip Planner

Metro provides a feed to the Google Transit trip planner. Links to this service is to be prominently displayed on Metro's home page and System Map page, and launched in a separate tab.

## 2.5 System Map

An interactive system map displaying multiple and individual routes and their respective stops/time-points is currently under development by Metro's IT department (a preview of the beta development version can be viewed at: <http://www.scmd.com/googlemap>). A menu of Metro routes grouped by geographic area controls the display of color-coded route and bus-stop overlays on an embedded Google Map, and each route provides links to: service calendars, planned service changes, service alerts, and pop-up printable timetables (see 2.6 Schedule Publishing). It will soon be officially launched on Metro's current website when the full feature list is completed, tested, and fully optimized for performance.

The selected firm shall assist in visual design improvements, advise on ADA compliance, recommend new features, and assist in integrating this AJAX application into the new Joomla framework.

## 2.6 Schedule Publishing

The route menu of the System Map (2.5 above) provides links to schedules that pop-up in a separate window. These schedules are currently provided in both Adobe PDF (extracted from our print publication *Headways*, showing timetable, service calendar, and schematic map), and also in vertical text format static html. For ease of quarterly maintenance, and improved presentation, the static html route timetables will be replaced with a dynamic database-driven Joomla component, which can display a timetable for any weekday/weekend, inbound/outbound route in both vertical and horizontal format, adhering to current ADA standards, and providing PDF output.

The IT department will lead the development of this custom component, if no suitable component exists. Proposals shall recommend any existing Joomla components that fit this purpose, or could be used as a starting point for customization to this purpose. The selected firm shall assist with visual design elements, advise on ADA compliance, and recommend new features.

## 2.7 Agency Information Published by Department with RSS feeds

Metro has identified the following content sections for articles published by their respective departments and links to articles provided in Really Simple Syndication (RSS) feeds:

- Rider Service Bulletins - categorized by geographic area of service, or as general information
- Board of Directors - Board Members, calendar, minutes & agendas, public hearing notifications
- Bids - Policies, Listings of current Request for Proposals (RFP) and Invitation for Bids (IFB), private area for prospective vendors to subscribe and request copies of IFBs and RFPs or to be added to Metro's vendor mailing lists
- Jobs - Openings, qualifications (private area to submit application)
- Expansion Projects - MetroBase and future projects news and progress
- Annual Reports - To be determined
- ParaCruz (Metro's paratransit division) - Rider's guide, contact information, feedback form
- Bus Advertising – section to promote advertising space on buses and contact information

## 2.8 Targeted Email

Customers may subscribe/unsubscribe through the website to receive targeted email notification of all sections described above (section 2.7). All departments self-publish. Key email features desired are:

- bounce back administration - ability to cull bounced email addresses
- redundancy filters - when an email is sent out to multiple targets, the subscriber, who may subscribe to multiple targets, receives only one email

The selected firm shall assist in the selection of the best-of-breed Joomla component

## 2.9 Customer Service Report Ticket Tracking

Separate feedback forms for both fixed-route and paratransit customers to fill out service or website complaints (or compliments). Customer information fields will mostly replicate existing forms. The selected firm shall assist in the selection of the best-of-breed Joomla component for tracking and resolving service tickets, and reporting on ticket statistics, and status of open tickets, shall be filtered by type (fixed-route, paratransit).

## 2.10 E-Commerce

Customer surveys have indicated a widespread desire to purchase various types of bus passes online. The selected firm shall assist in the selection of the best-of-breed Joomla component for e-commerce, handling everything from start to finish: catalog (not limited to bus passes), shopping cart, payment processing, fulfillment tracking, sales reporting. Please list any additional expenses (merchant accounts, transaction fees, secure socket certificate, etc).

## 2.11 METRO will provide:

- Assistance in the selection of designs, color schemes, content organization (site map)
- Existing logo, content, and promotional materials
- Sample schedule and map data
- Joomla hosting for all development and deployment

## 3. Tentative Project Schedule

Event	Date
Proposal Issue Date	December 3, 2008
Proposal Due Date	January 5, 2009, 5:00 PM
Board Approval of Contract	February 27, 2009
Contract Award	March 1, 2009
Review Site Content requirements	March 15, 2009
Present alternative visual designs	April 1, 2009
Deliver updated METRO logo & templates	April 15, 2009
Migrate legacy content	May 1, 2009
Initiate Beta testing on parallel site	May 15, 2009
Focus Group testing	June 1, 2009
Initiate revisions from focus group findings	July 1, 2009
Web site completion and acceptance	August 1, 2009

## 4. Proposal Submissions

### 4.1 General

Submit a proposal response to this request using an appropriate format on 8-1/2 x 11" paper. Complete and attach **all** forms provided in Part II of this RFP.

### 4.2 Experience

Describe previous experience with similar projects particularly if public sector and/or transit related. Please include the platforms on which web site development and integration has been done.

### 4.3 References

Provide at least three references to previous contracts with comparable consulting elements. References should include a detailed description of the work performed, cost, the manager or team leading the work and the name, address and telephone number of each primary contact and links to the web sites on which the design and development was performed.

#### 4.4 Cost Proposal

The selected firm shall provide a cost proposal for required services, including the cost of required commercial components. While third-party components proposed may be either free or commercial, depending on best features and ease of long-term maintenance/cost, an allowance of \$1,000 per component (bilingual, email, customer service ticket tracking, e-commerce) must be included the itemization of total cost to keep all proposals comparable. Metro reserves the right to adjust cost accordingly on any proposal where this allowance is not observed.

**Cost proposals shall breakdown the estimated hours and rates for each of the following:**

- Site template, color theme, logo redesign, and graphic design elements
- Site subject/category reorganization
- Agency Information Published by Department (with RSS feeds)
- Migration of all content from the existing site
- Bilingual component\*
- Targeted email component\*
- Customer Service Report ticket tracking component\*
- E-Commerce component\*
- Design/Integration for System Map and Schedules
- Additional recommended components (if any, include actual cost)
- Changes determined from focus group review
- Hourly rate for additional work

\* = component allowance of \$1000 required.

#### 5. Evaluation Criteria

Proposals will be evaluated according to the following criteria by a team of METRO staff:

Criteria	Points
Responsiveness to Project scope and Schedule	35 points
Previous Web Design experience and work examples	25 points
References	20 Points
Cost	15 Points
DBE Participation	5 Points
<b>Total Points</b>	<b>100 Points</b>

#### 6. Proposal Submission

Submit an original and four copies of your proposal response to this request by the deadline to:

Lloyd Longnecker, Purchasing Agent  
Santa Cruz Metropolitan Transit District  
370 Encinal Street, Suite 100  
Santa Cruz, CA 95060

Proposals are due to the District by January 5, 2009, at 5:00 p.m. and become the property of the Santa Cruz Metropolitan Transit District.

## **PART IV**

### **GENERAL CONDITIONS TO THE CONTRACT**

#### **1. GENERAL PROVISIONS**

##### **1.01 Governing Law & Compliance with All Laws**

This Contract is governed by and construed in accordance with the laws of California. Each party will perform its obligations hereunder in accordance with all applicable laws, rules, and regulations now or hereafter in effect. Contractor shall ensure throughout the terms of this Agreement that all federal, state and local laws and requirements are met including any requirements District is obligated to perform because of receipt of grant funding. Contractor shall also be required to fulfill its obligation as a federal and/or state and/or local sub-recipient of grant funding.

##### **1.02 Right to Modify Contract**

District may extend the term of this Contract, expand the Scope of Work, or otherwise amend the Contract. Any such extension, expansion or amendment shall be effective only upon written agreement of the parties in accordance with Section 13.14.

#### **2. TERMINATION**

##### **2.01 Termination for Convenience**

2.01.01 The performance of Work under this Contract may be terminated by the District upon fifteen (15) days' notice at any time without cause for any reason in whole or in part, whenever the District determines that such termination is in the District's best interest.

2.01.02 Upon receipt of a notice of termination, and except as otherwise directed by the District, the Contractor shall: (1) stop work under the Contract on the date and to the extent specified in the notice of termination; (2) place no further orders or subcontracts for materials, services, or facilities, except as may be necessary for completion of such portion of the Work under the Contract as is not terminated; (3) terminate all orders and subcontracts to the extent that they relate to the performance of work terminated by the notice of termination; (4) assign to the District in the manner, at the time, and to the extent directed by the District all of the rights, title, and interest of the Contractor under the orders and subcontracts so terminated, in which case the District shall have the right, at its discretion, to settle or pay any or all claims arising out of the termination of such orders and subcontracts; (5) settle all outstanding liabilities and claims arising out of such termination or orders and subcontracts, with the approval or ratification of the District, to the extent the District may require, which approval or ratification shall be final for all the purposes of this clause; (6) transfer title to the District and deliver in the manner, at the time, and to the extent, if any, directed by District the fabricated or unfabricated parts, work in progress, completed work, supplies and other material produced as a part of, or acquired in connection with the performance of, the work terminated and the completed or partially completed plans, drawings, information and other property which, if the Contract had been completed, would have been required to be furnished to the District; (7) use its best efforts to sell, in the manner, at the time, to the extent, and at the price(s) directed or authorized by the District, any property of the types referred to above provided, however, that the Contract shall not be required to extend credit to any purchaser, and may acquire any such property under the conditions prescribed by and at a price(s) approved by the District, and provided further, that the proceeds of any such transfer or disposition shall be applied in reduction of any payments to be made to the District to the Contractor under this Contract or shall otherwise be credited to the price or cost of the Work covered by this Contract or paid in such other manner as the District may direct; (8) complete performance of

such part of the Work as shall not have been terminated by the notice of termination; and (9) take such action as may be necessary, or as the District may direct, for the protection or preservation of the property related to this Contract which is in the possession of the Contractor and in which the District has or may acquire an interest.

## 2.02 Termination for Default

2.02.01 The District may, upon written notice of default to the Contractor, terminate the whole or any part of this Contract if the Contractor: (1) fails to complete the Scope of Work within time period stated in the Specifications section of the IFB; (2) fails to perform any of the other provisions of the Contract; or (3) fails to make progress as to endanger performance of this Contract in accordance with its provisions.

2.02.02 If the Contract is terminated in whole or in part for default, the District may procure, upon such terms and in such manner as the District may deem appropriate, supplies or services similar to those so terminated. Without limitation to any other remedy available to the District, the Contractor shall be liable to the District for any excess costs for such similar supplies or services, and shall continue the performance of this Contract to the extent not terminated under the provisions of this clause.

2.02.03 If, after notice of termination of this Contract under the provisions of this clause, it is determined for any reason that the Contractor was not in default under the provisions of this clause, or that the default was excusable under the provisions of this clause, the rights and obligations of Contractor and District shall be considered to have been terminated pursuant to termination for convenience of the District pursuant to Article 2.01 from the date of Notification of Default.

## 2.03 No Limitation

The rights and remedies of the District provided in this Article 2 shall not be exclusive and are in addition to any other rights and remedies provided by law or under this Contract.

## 3. FORCE MAJEURE

### 3.01 General

Neither party hereto shall be deemed to be in default of any provision of this Contract, or for any failure in performance, resulting from acts or events beyond the reasonable control of such party. For purposes of this Contract, such acts shall include, but not be limited to, acts of God, civil or military authority, civil disturbance, war, strikes, fires, other catastrophes, or other "force majeure" events beyond the parties' reasonable control; provided, however, that the provisions of this Section 3 shall not preclude District from canceling or terminating this Contract (or any order for any product included herein), as otherwise permitted hereunder, regardless of any force majeure event occurring to Contractor.

### 3.02 Notification by Contractor

Contractor shall notify District in writing as soon as Contractor knows, or should reasonably know, that a force majeure event (as defined in Section 3.01) has occurred that will delay completion of the Scope of Work. Said notification shall include reasonable proofs required by the District to evaluate any Contractor request for relief under this Article 3. District shall examine Contractor's notification and determine if the Contractor is entitled to relief. The District shall notify the Contractor of its decision in writing. The District's decision regarding whether or not the Contractor is entitled to force majeure relief shall be final and binding on the parties.

### 3.03 Losses

Contractor is not entitled to damages, compensation, or reimbursement from the District for losses resulting from any "force majeure" event.

#### 4. PROFESSIONAL STANDARDS

Contractor shall at all times during the term of this Contract possess the technical ability, experience, financial ability, overall expertise, and all other skills, licenses, and resources necessary to perform and complete the scope of work in a timely, professional manner so as to meet or exceed the provisions of this Contract.

#### 5. PROFESSIONAL RELATIONS

##### 5.01 Independent Contractor

No relationship of employer and employee is created by this Contract. In the performance of its work and duties, Contractor is at all times acting and performing as an independent contractor in the practice of its profession. District shall neither have nor exercise control or direction over the methods by which Contractor performs services pursuant to this Contract (including, without limitation, its officers, shareholders, and employees); provided, however, that Contractor agrees that all work performed pursuant to this Contract shall be in strict accordance with currently approved methods and practices in its profession, and in accordance with this Contract. The sole interest of District is to ensure that such services are performed and rendered in a competent and cost effective manner.

##### 5.02 Benefits

Contractor (including, without limitation, its officers, shareholders, subcontractors and employees) has no claim under this Contract or otherwise against the District for social security benefits, workers' compensation benefits, disability benefits, unemployment benefits, vacation pay, sick leave, or any other employee benefit of any kind.

#### 6. INDEMNIFICATION FOR DAMAGES, TAXES AND CONTRIBUTIONS

##### 6.01 Scope

Contractor shall exonerate, indemnify, defend, and hold harmless District (which for the purpose of Articles 6 and 7 shall include, without limitation, its officers, agents, employees and volunteers) from and against:

6.01.01 Any and all claims, demands, losses, damages, defense costs, or liability of any kind or nature which District may sustain or incur or which may be imposed upon it for injury to or death of persons, or damage to property as a result of, or arising out of, or in any manner connected with the Contractor's negligence, recklessness or willful misconduct under the provisions of this Contract. Such indemnification includes any damage to the person(s) or property (ies) of Contractor and third persons.

6.01.02 Any and all Federal, state and local taxes, charges, fees, or contributions required to be paid with respect to Contractor, Contractor's officers, employees and agents engaged in the performance of this Contract (including, without limitation, unemployment insurance, social security, and payroll tax withholding).

#### 7. INSURANCE

##### 7.01 General

Contractor, at its sole cost and expense, for the full term of this Contract (and any extensions thereof), shall obtain and maintain at minimum all of the following insurance coverage. Such insurance coverage shall be

primary coverage as respects District and any insurance or self-insurance maintained by District shall be excess of Contractor's insurance coverage and shall not contribute to it.

#### 7.02 Types of Insurance and Minimum Limits

Contractor shall obtain and maintain during the term of this Contract:

- (1) Worker's Compensation and Employer's Liability Insurance in conformance with the laws of the State of California (not required for Contractor's subcontractors having no employees).
- (2) Contractors vehicles used in the performance of this Contract, including owned, non-owned (e.g. owned by Contractor's employees), leased or hired vehicles, shall each be covered with Automobile Liability Insurance in the minimum amount of \$1,000,000.00 combined single limit per accident for bodily injury and property damage.
- (3) Contractor shall obtain and maintain Comprehensive General Liability Insurance coverage in the minimum amount of \$1,000,000.00 combined single limit, including bodily injury, personal injury, and property damage. Such insurance coverage shall include, without limitation:
  - (a) Contractual liability coverage adequate to meet the Contractor's indemnification obligations under this contract.
  - (a) Full Personal Injury coverage.
  - (a) Broad form Property Damage coverage.
  - (a) A cross-liability clause in favor of the District.
- (4) Contractor shall obtain and maintain Professional Liability Insurance coverage in the minimum amount of \$1,000,000.00.

#### 7.03 Other Insurance Provisions

- (1) As to all insurance coverage required herein, any deductible or self-insured retention exceeding \$5,000.00 shall be disclosed to and be subject to written approval by District.
- (2) If any insurance coverage required hereunder is provided on a "claims made" rather than "occurrence" form, Contractor shall maintain such insurance coverage for three (3) years after expiration of the term (and any extensions) of this Contract.
- (3) All required Automobile Liability Insurance and Comprehensive or Commercial General Liability Insurance shall contain the following endorsement as a part of each policy: "The Santa Cruz Metropolitan Transit District is hereby added as an additional insured as respects the operations of the named insured."
- (4) All the insurance required herein shall contain the following clause: "It is agreed that this insurance shall not be canceled until thirty (30) days after the District shall have been given written notice of such cancellation or reduction."
- (5) Contractor shall notify District in writing at least thirty (30) days in advance of any reduction in any insurance policy required under this Contract.
- (6) Contractor agrees to provide District at or before the effective date of this Contract with a certificate of insurance of the coverage required.
- (6) All insurance shall be obtained from brokers or carriers authorized to transact business in California and are satisfactory to the District.

## 8. SINGLE PROPOSAL

If only one proposal is received in response to the RFP, Offeror may be required to submit to District within five (5) days of District demand, a detailed cost proposal. The District may conduct a cost or price analysis of the cost proposal to determine if the proposal price(s) are fair and reasonable. Offeror shall cooperate with District in compiling and submitting detailed information for the cost and price analysis.

## 9. NO DISCRIMINATION

The Contractor or subcontractor shall not discriminate on the basis of race, color, national origin, or, sex in the performance of this contract. The contractor shall carry out applicable requirements of 49 CFR, Part 26 in the award and administration of DOT-assisted contracts. Failure by the contractor to carry out these requirements is a material breach of this contract, which may result in the termination of this contract or such other remedy, as recipient deems appropriate.

## 10. DISADVANTAGED BUSINESS ENTERPRISES

The Board of Directors of the Santa Cruz Metropolitan Transit District has adopted a Disadvantaged Business Enterprise Policy to promote the participation of disadvantaged business enterprises (DBE's) in all areas of District contracting to the maximum extent practicable. Consistent with the DBE Policy, the Contractor shall take all necessary and reasonable steps to ensure that DBE firms have the maximum practicable opportunity to participate in the performance of this project and any subcontracting opportunities thereof.

### I. PROMPT PAYMENT

#### 11.01 Prompt Progress Payment to Subcontractors

The prime contractor or subcontractor shall pay to any subcontractor not later than 10-days of receipt of each progress payment, in accordance with the provision in Section 7108.5 of the California Business and Professions Code concerning prompt payment to subcontractors. The 10-days is applicable unless a longer period is agreed to in writing. Any delay or postponement of payment over 30-days may take place only for good cause and with the District's prior written approval. Any violation of Section 7108.5 shall subject the violating contractor or subcontractor to the penalties, sanctions, and other remedies of that Section. This requirement shall not be construed to limit or impair any contractual, administrative, or judicial remedies, otherwise available to the contractor or subcontractor in the event of a dispute involving late payment or nonpayment by the contractor, deficient subcontractor performance, and/or noncompliance by a subcontractor. This clause applies to both DBE and non-DBE subcontractors.

#### A. Prompt Payment of Withheld Funds to Subcontractors

The District shall hold retainage from the prime contractor and shall make prompt and regular incremental acceptances of portions, as determined by the District of the contract work and pay retainage to the prime contractor based on these acceptances. The prime contractor or subcontractor shall return all monies withheld in retention from all subcontractors within 30 days after receiving payment for work satisfactorily completed and accepted including incremental acceptances of portions of the contract work by the District. Any delay or postponement of payment may take place only for good cause and with the District's prior written approval. Any violation of these provisions shall subject the violating prime contractor to the penalties, sanctions, and other remedies specified in Section 7108.5 of the California Business Professions Code. This requirement shall not be construed to limit or impair any contractual, administrative, or judicial remedies, otherwise available to the contractor or subcontractor in the event of: a dispute involving late payment or nonpayment by the contractor; deficient subcontractor performance; and/or noncompliance by a subcontractor. This clause applies to both DBE and non-DBE subcontractors.

Prime subcontractors must include the prompt payment language of paragraph 1 in all subcontracts, regardless of subcontractor's DBE status. Failure of a prime contractor to uphold prompt payment requirements for subcontractors will result in District withholding reimbursement for completed work.

## 12. RESERVED

## 13. MISCELLANEOUS PROVISIONS

### 13.01 Successors and Assigns

The Contract shall inure to the benefit of, and be binding upon, the respective successors and assigns, if any, of the parties hereto, except that nothing contained in this Article shall be construed to permit any attempted assignment which would be unauthorized or void pursuant to any other provision of this Contract.

### 13.02 Survival of Rights and Obligations

In the event of termination, the rights and obligations of the parties which by their nature survive termination of the services covered by this Contract shall remain in full force and effect after termination. Compensation and revenues due from one party to the other under this Contract shall be paid; loaned equipment and material shall be returned to their respective owners; the duty to maintain and allow inspection of books, accounts, records and data shall be extended as provided in Section 13.15; and the hold harmless agreement contained in Article 6 shall survive.

### 13.03 Limitation on District Liability

The District's liability is, in the aggregate, limited to the total amount payable under this Contract.

### 13.04 Drug and Alcohol Policy

Contractor shall not use, possess, manufacture, or distribute alcohol or illegal drugs during the performance of the Contract or while on District premises or distribute same to District employees.

### 13.05 Publicity

Contractor agrees to submit to District all advertising, sales promotion, and other public matter relating to any service furnished by Contractor wherein the District's name is mentioned or language used from which the connection of District's name therewith may, within reason, be inferred or implied. Contractor further agrees not to publish or use any such advertising, sales promotion or publicity matter without the prior written consent of District.

### 13.06 Consent to Breach Not Waiver

No provision hereof shall be deemed waived and no breach excused, unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. Any consent by any party to, or waiver of, a breach by the other, whether express or implied, shall not constitute a consent to, waiver of, or excuse for any other different or subsequent breach.

### 13.07 Attorneys' Fees

In the event that suit is brought to enforce or interpret any part of this Contract, the prevailing party shall be entitled to recover as an element of its costs of suit, and not as damages, a reasonable attorney's fee to be fixed by the court. The "prevailing party" shall be the party who is entitled to recover its costs of suit, whether or not the suit proceeds to final judgment. A party not entitled to recover its costs shall not recover attorney's fees. No sum for attorney's fees shall be counted in calculating the amount of a judgment for purposes of determining whether a party is entitled to recover its costs or attorney's fees.

13.08 No Conflict of Interest

Contractor represents that it currently has no interest, and shall not have any interest, direct or indirect, that would conflict in any manner with the performance of services required under this Contract.

13.09 Prohibition of Discrimination against Qualified Handicapped Persons

Contractor shall comply with the provisions of Section 504 of the Rehabilitation Act of 1973, as amended, pertaining to the prohibition of discrimination against qualified handicapped persons in federally-assisted programs.

13.10 Cal OSHA/Hazardous Substances

13.10.01 Contractor shall comply with California Administrative Code Title 8, Section 5194, and shall directly (1) inform its employees of the hazardous substances they may be exposed to while performing their work on District property, (2) ensure that its employees take appropriate protective measures, and (3) provide the District's Manager of Facility Maintenance with a Material Safety Data Sheet (MSDS) for all hazardous substances to be used on District property.

13.10.02 Contractor shall comply with Cal OSHA regulations and the Hazardous Substance Training and Information Act. Further, said parties shall indemnify the District against any and all damage, loss, and injury resulting from non-compliance with this Article.

13.10.03 Contractor will comply with the Safe Drinking Water and Toxic Enforcement Act of 1986 (Proposition 65) California Health and Safety Code Section 25249.5 - 25249.13. Contractor will ensure that clear and reasonable warnings are made to persons exposed to those chemicals listed by the State of California as being known to cause cancer or reproductive toxicity.

13.10.04 Contractor shall be solely responsible for any hazardous material, substance or chemical released or threatened release caused or contributed to by Contractor. Contractor shall be solely responsible for all clean-up efforts and costs.

13.11 Non-Assignment of Contract

The Contractor shall not assign, transfer, convey, sublet, or otherwise dispose of the Contract or Contractor's right, title or interest in or to the same or any part thereof without previous written consent by the District; and any such action by Contractor without District's previous written consent shall be void.

13.12 No Subcontract

Contractor shall not subcontract or permit anyone other than Contractor or its authorized staff and subcontractors to perform any of the scope of work, services or other performance required of Contractor under this Contract without the prior written consent of the District. Any such action by Contractor without District's previous consent shall be void.

13.13 Severability

If any provision of this Contract is held by a court of competent jurisdiction to be invalid, void or unenforceable, the remaining provisions shall continue in full force and effect, and shall in no way be affected, impaired or invalidated.

13.14 All Amendments in Writing

No amendment to this Contract shall be effective unless it is in writing and signed by duly authorized representatives of both parties.

13.15 Audit

This Contract is subject to audit by Federal, State, or District personnel or their representatives at no cost for a period of four (4) years after the date of expiration or termination of the Contract. Requests for audits shall be made in writing, and Contractor shall respond with all information requested within ten (10) calendar days of the date of the request. During the four-year period that the Contract is subject to audit, Contractor shall maintain detailed records substantiating all costs and expenses billed against the Contract.

13.16 Smoking Prohibited

Contractor, its employees and agents shall not smoke in any enclosed area on District premises or in a District vehicle.

13.17 Responsibility for Equipment

13.17.01 District shall not be responsible nor held liable for any damage to person or property consequent upon the use, or misuse, or failure of any equipment used by Contractor, or any of its employees, even though such equipment be furnished, rented or loaned to Contractor by District.

13.17.02 Contractor is responsible to return to the District in good condition any equipment, including keys, issued to it by the District pursuant to this Agreement. If the contractor fails or refuses to return District-issued equipment within five days of the conclusion of the contract work the District shall deduct the actual costs to repair or replace the equipment not returned from the final payment owed to contractor or take other appropriate legal action at the discretion of the District.

13.18 Grant Contracts

13.18.01 Contractor shall ensure throughout the terms of this Agreement that all federal, state and local laws and requirements are met including any requirements District is obligated to perform because of receipt of grant funding. Contractor shall also be required to fulfill its obligation as a federal and/or state and/or local sub-recipient of grant funding.

13.19 Time of the Essence

13.19.01 Time is of the essence in this Contract

## PART V

### CONTRACT FOR WEB SITE DESIGN AND IMPLEMENTATION (09-04)

THIS CONTRACT is made effective on \_\_\_\_\_, 2008 between the SANTA CRUZ METROPOLITAN TRANSIT DISTRICT, a political subdivision of the State of California ("District"), and \_\_\_\_\_ ("Contractor").

#### 1. RECITALS

##### 1.01 District's Primary Objective

District is a public entity whose primary objective is providing public transportation and has its principal office at 370 Encinal Street, Suite 100, Santa Cruz, California 95060.

##### 1.02 District's Need for Web Site Design and Implementation Services

District has the need for Web Site Design and Implementation Services. In order to obtain these services, the District issued a Request for Proposals, dated December 3, 2008, setting forth specifications for such services. The Request for Proposals is attached hereto and incorporated herein by reference as Exhibit "A".

##### 1.03 Contractor's Proposal

Contractor is a firm/individual qualified to provide Web Site Design and Implementation Services and whose principal place of business is \_\_\_\_\_. Pursuant to the Request for Proposals by the District, Contractor submitted a proposal for Web Site Design and Implementation Services, which is attached hereto and incorporated herein by reference as Exhibit "B."

##### 1.04 Selection of Contractor and Intent of Contract

On \_\_\_\_\_, District selected Contractor as the offeror whose proposal was most advantageous to the District, to provide Web Site Design and Implementation Services described herein. This Contract is intended to fix the provisions of these services.

District and Contractor agree as follows:

#### 2. INCORPORATED DOCUMENTS AND APPLICABLE LAW

##### 2.01 Documents Incorporated in this Contract

The documents below are attached to this Contract and by reference made a part hereof. This is an integrated Contract. This writing constitutes the final expression of the parties' contract, and it is a complete and exclusive statement of the provisions of that Contract, except for written amendments, if any, made after the date of this Contract in accordance with Section 13.14.

##### A. Exhibit "A"

Santa Cruz Metropolitan Transit District's "Request for Proposals" dated December 3, 2008

##### B. Exhibit "B" (Contractor's Proposal)

Contractor's Proposal to the District for Web Site Design and Implementation Services, signed by Contractor and dated January 5, 2009.

2.02 Conflicts

Where in conflict, the provisions of this writing supersede those of the above-referenced documents, Exhibits "A" and "B". Where in conflict, the provisions of Exhibit "A" supercede Exhibit "B".

2.03 Recitals

The Recitals set forth in Article 1 are part of this Contract.

3. DEFINITIONS

3.01 General

The terms below (or pronouns in place of them) have the following meaning in the contract:

3.01.01 CONTRACT - The Contract consists of this document, the attachments incorporated herein in accordance with Article 2, and any written amendments made in accordance with Section 13.14.

3.01.02 CONTRACTOR - The Contractor selected by District for this project in accordance with the Request for Proposals issued December 3, 2008.

3.01.03 CONTRACTOR'S STAFF - Employees of Contractor.

3.01.04 DAYS - Calendar days.

3.01.05 OFFEROR - Contractor whose proposal was accepted under the terms and conditions of the Request for Proposals issued December 3, 2008.

3.01.06 PROVISION - Any term, agreement, covenant, condition, clause, qualification, restriction, reservation, or other stipulation in the contract that defines or otherwise controls, establishes, or limits the performance required or permitted by either party.

3.01.07 SCOPE OF WORK (OR "WORK") - The entire obligation under the Contract, including, without limitation, all labor, equipment, materials, supplies, transportation, services, and other work products and expenses, express or implied, in the Contract.

4. TIME OF PERFORMANCE

4.01 Term

The term of this Contract will be for a period not to exceed one (1) year and shall commence upon the issuance of the contract by the District.

At the option of the District, this contract agreement may be renewed for four (4) additional one (1) year terms upon mutual written consent.

5. COMPENSATION

5.01 Terms of Payment

District shall compensate Contractor in an amount not to exceed the amounts/rates agreed upon by the District. District shall reasonably determine whether work has been successfully performed for purposes of payment. Compensation shall be made within thirty (30) days of District written approval of Contractor's

written invoice for said work. Contractor understands and agrees that if he/she exceeds the \$\_\_\_\_\_ maximum amount payable under this contract, that it does so at its own risk.

5.02 Invoices

Contractor shall submit invoices with a purchase order number provided by the District on a monthly basis. Contractor's invoices shall include detailed records showing actual time devoted, work accomplished, date work accomplished, personnel used, and amount billed per hour. Expenses shall only be billed if allowed under the Contract. Telephone call expenses shall show the nature of the call and identify location and individual called. Said invoice records shall be kept up-to-date at all times and shall be available for inspection by the District (or any grantor of the District, including, without limitation, any State or Federal agency providing project funding or reimbursement) at any time for any reason upon demand for not less than four (4) years after the date of expiration or termination of the Contract. Under penalty of law, Contractor represents that all amounts billed to the District are (1) actually incurred; (2) reasonable in amount; (3) related to this Contract; and (4) necessary for performance of the project.

6. NOTICES

All notices under this Contract shall be deemed duly given upon delivery, if delivered by hand; or three (3) days after posting, if sent by registered mail, receipt requested; to a party hereto at the address hereinunder set forth or to such other address as a party may designate by notice pursuant hereto.

DISTRICT

Santa Cruz Metropolitan Transit District  
370 Encinal Street  
Suite 100  
Santa Cruz, CA 95060  
Attention: General Manager

CONTRACTOR

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Attention: \_\_\_\_\_

7. AUTHORITY

Each party has full power and authority to enter into and perform this Contract and the person signing this Contract on behalf of each has been properly authorized and empowered to enter into this Contract. Each party further acknowledges that it has read this Contract, understands it, and agrees to be bound by it.

Signed on \_\_\_\_\_

DISTRICT  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

\_\_\_\_\_  
Leslie R. White  
General Manager

CONTRACTOR

By \_\_\_\_\_

Approved as to Form:

\_\_\_\_\_  
Margaret Rose Gallagher  
District Counsel

## **PART VI**

### **FEDERAL TRANSIT ADMINISTRATION REQUIREMENTS FOR NON-CONSTRUCTION CONTRACTS**

#### **1.0 GENERAL**

This Contract is subject to the terms of a financial assistance contract between the Santa Cruz Metropolitan Transit District and the Federal Transit Administration (FTA) of the United States Department of Transportation.

#### **2.0 INTEREST TO MEMBERS OF OR DELEGATES TO CONGRESS**

In accordance with 18 U.S.C. 431, no member of, nor delegates to, the Congress of the United States shall be admitted to a share or part of this Contract or to any benefit arising therefrom.

#### **3.0 INELIGIBLE CONTRACTORS**

Neither Contractor, subcontractor, nor any officer or controlling interest holder of Contractor or subcontractor, is currently, or has been previously, on any debarred bidders list maintained by the United States Government.

#### **4.0 EQUAL EMPLOYMENT OPPORTUNITY (Not applicable to contracts for standard commercial supplies and raw materials)**

In connection with the execution of this Contract, the Contractor shall not discriminate against any employee or application for employment because of race, religion, color, sex, age (40 or over), national origin, pregnancy, ancestry, marital status, medical condition, physical handicap, sexual orientation, or citizenship status. The Contractor shall take affirmative action to insure that applicants employed and that employees are treated during their employment, without regard to their race, religion, color, sex national origin, etc. Such actions shall include, but not be limited to the following: Employment, upgrading, demotion or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and, selection for training including apprenticeship. Contractor further agrees to insert a similar provision in all subcontracts, except subcontracts for standard commercial supplies or raw materials.

#### **5.0 TITLE VI CIVIL RIGHTS ACT OF 1964**

During the performance of this Contract, the Contractor, for itself, its assignees and successors in interest (hereinafter referred to as the "Contractor"), agrees as follows:

##### **5.1 Compliance with Regulations**

The Contractor shall comply with the Regulations relative to nondiscrimination in federally assisted programs of the Department of Transportation (hereinafter "DOT") Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time (hereinafter referred to as the "Regulations"), which are herein incorporated by reference and made a part of this Contract.

##### **5.2 Nondiscrimination**

The Contractor, with regard to the work performed by it during the Contract, shall not discriminate on the grounds of race, religion, color, sex, age or national origin in the selection and retention of subcontractors, including procurements of materials and leases of equipment. The Contractor shall not participate either directly or indirectly in the discrimination prohibited in Section 21.5 of the Regulations, including employment practices when the Contract covers a program set forth in Appendix B of the regulations.

### 5.3 Solicitations for Subcontracts, Including Procurements of Materials and Equipment

In all solicitations either by competitive bidding or negotiation made by the Contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by the Contractor of the Contractor's obligations under this Contract and the Regulations relative to nondiscrimination on the grounds of race, religion, color, sex, age or national origin.

### 5.4 Information and Reports

The Contractor shall provide all information and reports required by the Regulations or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the District or the Federal Transit Administration (FTA) to be pertinent to ascertain compliance with such Regulations, orders and instructions. Where any information is required or a Contractor is in the exclusive possession of another who fails or refuses to furnish this information, the Contractor shall so certify to the District, or the Federal Transit Administration, as appropriate, and shall set forth what efforts it has made to obtain the information.

### 5.5 Sanctions for Noncompliance

In the event of the Contractor's noncompliance with the nondiscrimination provisions of this Contract, the District shall impose such contract sanctions as it or the Federal Transit Administration may determine to be appropriate, including, but not limited to:

- (a) Withholding of payments to the Contractor under the Contract until the Contractor complies; and/or,
- (b) Cancellation, termination or suspension of the Contract, in whole or in part.

### 5.6 Incorporation of Provisions

The Contractor shall include the provisions of Paragraphs (1) through (6) of this section in every subcontract, including procurements of materials and leases of equipment, unless exempt by the Regulations or directives issued pursuant thereto. The Contractor shall take such action with respect to any subcontract or procurement as the District or the Federal Transit Administration may direct as a means of enforcing such provisions, including sanctions for noncompliance; provided, however, that in the event a Contractor becomes involved in, or is threatened with, litigation with a subcontractor or supplier as a result of such direction, the Contractor may require the District to enter into such litigation to protect the interests of the District, and, in addition, the Contractor may request the services of the Attorney General in such litigation to protect the interests of the United States.

## 6.0 CLEAN AIR AND FEDERAL WATER POLLUTION CONTROL ACTS (Applicable only to contracts in excess of \$100,000)

Contractor shall comply with all applicable standards, orders or requirements issued under Section 306 of the Clean Air Act (42 USC 1857[h]), Section 508 of the Clean Water Act (33 USC 1368), Executive Order 11738, and Environmental Protection Agency Regulations (40 CFR, Part 15), which prohibit the use under non-exempt Federal contracts, grants or loans of facilities included on the EPA List of Violating Facilities. Contractor shall report all violations to FTA and to the USEPA Assistant Administrator for Enforcement (EN0329).

## 7.0 CONSERVATION

Contractor shall recognize mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plan issued in compliance with the Energy Policy and Conservation Act (42 USC Section 6321, et seq.).

## 8.0 AUDIT AND INSPECTION OF RECORDS (Applicable only to sole source or negotiated contracts in excess of \$10,000)

Contractor agrees that the District, the Comptroller General of the United States, or any of their duly authorized representatives shall, for the purpose of audit and examination, be permitted to inspect all work, materials, payrolls and other data and records with regard to the project, and to audit the books, records and accounts with regard to the project. Further, Contractor agrees to maintain all required records for at least three years after District makes final payments and all other pending matters are closed.

## 9.0 LABOR PROVISIONS (Applicable only to contracts of \$2,500.00 or more that involve the employment of mechanics or laborers)

### 9.1 Overtime Requirements

No Contractor or subcontractor contracting for any part of the contract work which may require or involve the employment of laborers or mechanics shall require or permit any such laborer or mechanic in any work week in which he or she is employed on such work to work in excess of eight (8) hours in any calendar day or in excess of forty (40) hours in such work week unless such laborer or mechanic receives compensation at a rate not less than one and one-half (1 1/2) times the basic rate of pay for all hours worked in excess of eight (8) hours in any calendar day or in excess of forty (40) hours in such work week, whichever is greater.

### 9.2 Violation; Liability for Unpaid Wages; Liquidated Damages

In the event of any violation of the clause set forth in subparagraph (b)(1) of 29 CFR Section 5.5, the Contractor and any subcontractor responsible therefore shall be liable for the unpaid wages. In addition, such Contractor and subcontractor shall be liable to the United States (in the case of work done under contract for the District of Columbia or a territory, to such district or to such territory), for liquidated damages. Such liquidated damages shall be computed with respect to each individual laborer or mechanic, including watchmen and guards, employed in violation of the clause set forth in subparagraph (b)(1) of which such individual was required or permitted to work in excess of eight (8) hours in excess of the standard work week of forty (40) hours without payment of the overtime wages required by the clause set forth in subparagraph (b)(1) of 29 CFR Section 5.5.

### 9.3 Withholding for Unpaid Wages and Liquidated Damages

DOT or the District shall upon its own action or upon written request of an authorized representative of the Department of Labor withhold or cause to be withheld, from any monies payable on account of work performed by the Contractor or subcontractor under any such contract or any other Federal contract with the same prime Contractor, or any other federally-assisted contract subject to the Contract Work Hours and Safety Standards Act, which is held by the same prime Contractor, such sums as may be determined to be necessary to satisfy any liabilities of such Contractor or subcontractor for unpaid wages and liquidated damages as provided in the clause set forth in subparagraph (b)(2) of 29 CFR Section 5.5.

### 9.4 Nonconstruction Grants

The Contractor or subcontractor shall maintain payrolls and basic payroll records during the course of the work and shall preserve them for a period of three (3) years from the completion of

the Contract for all laborers and mechanics, including guards and watchmen, working on the Contract. Such records shall contain the name and address of each such employee, social security number, correct classifications, hourly rates of wages paid, daily and weekly number of hours worked, deductions made and actual wages paid. Further, the District shall require the contracting officer to insert in any such contract a clause providing that the records to be maintained under this paragraph shall be made available by the Contractor or subcontractor for inspection, copying or transcription by authorized representatives of DOT and the Department of Labor, and the Contractor or subcontractor will permit such representatives to interview employees during working hours on the job.

#### 9.5 Subcontracts

The Contractor or subcontractor shall insert in any subcontracts the clauses set forth in subparagraph (1) through (5) of this paragraph and also a clause requiring the subcontractors to include these clauses in any lower tier subcontracts. The prime contractor shall be responsible for compliance by any subcontractor or lower tier subcontractor with the clauses set forth in subparagraphs (1) through (5) of this paragraph.

#### 10.0 CARGO PREFERENCE (Applicable only to Contracts under which equipment, materials or commodities may be transported by ocean vehicle in carrying out the project)

The Contractor agrees:

- 10.1 To utilize privately owned United States-flag commercial vessels to ship at least fifty percent (50%) of the gross tonnage (computed separately for dry bulk carriers, dry cargo liners and tankers) involved, whenever shipping any equipment, materials or commodities pursuant to this section, to the extent such vessels are available at fair and reasonable rates for United States- flag commercial vessels.
- 10.2 To furnish within 30 days following the date of loading for shipments originating within the United States, or within thirty (30) working days following the date of loading for shipment originating outside the United States, a legible copy of a rated, "on-board" commercial ocean bill-of-lading in English for each shipment of cargo described in paragraph (1) above, to the District (through the prime Contractor in the case of subcontractor bills-of-lading) and to the Division of National Cargo, Office of Market Development, Maritime Administration, 400 Seventh Street, S.W., Washington D. C. 20590, marked with appropriate identification of the project.
- 10.3 To insert the substance of the provisions of this clause in all subcontracts issued pursuant to this Contract.

#### 11.0 BUY AMERICA PROVISION

This procurement is subject to the Federal Transportation Administration Buy America Requirements in 49 CFR 661. A Buy America Certificate, if required format (see Form of Proposal or Bid Form) must be completed and submitted with the proposal. A proposal that does not include the certificate shall be considered non-responsive. A waiver from the Buy America Provision may be sought by the District if grounds for the waiver exist. Section 165a of the Surface Transportation Act of 1982 permits FTA participation on this Contract only if steel and manufactured products used in the Contract are produced in the United States. In order for rolling stock to qualify as a domestic end product, the cost of components produced in the United States must exceed sixty percent (60%) of the cost of all components, and final assembly must take place in the United States.

## 12.0 DISADVANTAGED BUSINESS ENTERPRISE (DBE) PARTICIPATION

### 12.1 Policy

It is the policy of the U.S. Department of Transportation that Disadvantaged Business Enterprises as defined in 49 CFR Part 26 shall have the maximum opportunity to participate in the performance of contracts financed in whole or in part with Federal funds under this Agreement. Consequently, the DBE requirements of 49 CFR Part 26 apply to this Agreement.

### 12.2 DBE Obligation

District and Contractor agree to insure that Disadvantaged Business Enterprises as defined in 49 CFR Part 26 have the maximum opportunity to participate in the performance of contracts and subcontracts under this Agreement. In this regard, District and Contractor shall take all necessary and reasonable steps in accordance with 49 CFR Part 26 to insure that Disadvantaged Business Enterprises have the maximum opportunity to compete for and perform Contracts. District and Contractor shall not discriminate on the basis of race, creed, color, national origin, age or sex in the award and performance of DOT-assisted Contracts.

### 12.3 Transit Vehicle Manufacturers

Transit vehicle manufacturers must certify compliance with DBE regulations.

## 13.0 CONFLICT OF INTEREST

No employee, officer or agent of the District shall participate in selection, or in the award of administration of a contract if a conflict of interest, real or apparent, would be involved. Such a conflict would arise when (1) the employee, officer or agent; (2) any member of his or her immediate family; (3) his or her partner; or (4) an organization that employs, or is about to employ, has a financial or other interest in the firm selected for award. The District's officers, employees or agents shall neither solicit nor accept gratuities, favors or anything of monetary value from Contractors, potential Contractors or parties of sub agreements.

## 14.0 MOTOR VEHICLE EMISSION REQUIREMENTS (Applicable only to Contracts involving the purchase of new motor vehicles)

The Contractor must provide a certification that:

- (a) The horsepower of the vehicle is adequate for the speed, range, and terrain in which it will be required and also to meet the demands of all auxiliary equipment.
- (b) All gases and vapors emanating from the crankcase of a spark-ignition engine are controlled to minimize their escape into the atmosphere.
- (c) Visible emission from the exhaust will not exceed No. 1 on the Ringlemann Scale when measured six inches (6") from the tail pipe with the vehicle in steady operation.
- (d) When the vehicle has been idled for three (3) minutes and then accelerated to eighty percent (80%) of rated speed under load, the opacity of the exhaust will not exceed No. 2 on the Ringlemann Scale for more than five (5) seconds, and not more than No. 1 on the Ringlemann Scale thereafter.

## 15.0 MOTOR VEHICLE SAFETY STANDARDS (Applicable only to contracts involving the purchase of new motor vehicles)

The Contractor will assure that the motor vehicles purchased under this contract will comply with the Motor Vehicle Safety Standards as established by the Department of Transportation at 49 CFR Parts 390 and 571.

## 16.0 DEBARRED BIDDERS

The Contractor, including any of its officers or holders of a controlling interest, is obligated to inform the District whether or not it is or has been on any debarred bidders' list maintained by the United States Government. Should the Contractor be included on such a list during the performance of this project, Contractor shall so inform the District.

## 17.0 PRIVACY (Applicable only to Contracts involving the administration of any system of records as defined by the Privacy Act of 1974, on behalf of the Federal Government)

### 17.1 General

The District and Contractor agree:

- (a) To comply with the Privacy Act of 1974, 5 U.S.C. 552a (the Act) and the rules and regulations issued pursuant to the Act when performance under the Contract involves the design, development or operation of any system of records on individuals to be operated by the District, its contractors or employees to accomplish a Government function.
- (b) To notify the Government when the District or Contractor anticipates operating a system of records on behalf of the Government in order to accomplish the requirements of this Agreement, if such system contains information about individuals which information will be retrieved by the individual's name or other identifier assigned to the individual. A system of records subject to the Act may not be employed in the performance of this Agreement until the necessary approval and publication requirements applicable to the system have been carried out. The District or Contractor, as appropriate, agrees to correct, maintain, disseminate, and use such records in accordance with the requirements of the Act, and to comply with all applicable requirements of the Act.
- (c) To include the Privacy Act Notification contained in this Agreement in every subcontract solicitation and in every subcontract when the performance of Work under the proposed subcontract may involve the design, development or operation of a system of records on individuals that is to be operated under the Contract to accomplish a Government function; and
- (d) To include this clause, including this paragraph in all in subcontracts under which Work for this Agreement is performed or which is awarded pursuant to this Agreement or which may involve the design, development, or operation of such a system of records on behalf of the Government.

### 17.2 Applicability

For purposes of the Privacy Act, when the Agreement involves the operation of a system of records on individuals to accomplish a Government function, the District, third party contractors and any of their employees are considered to be employees of the Government with respect to the Government function and the requirements of the Act, including the civil and criminal penalties for violations of the Act, are applicable except that the criminal penalties shall not apply with regard to contracts effective prior to September 27, 1975. In addition, failure to comply with the provisions of the Act or of this clause will make this Agreement subject to termination.

### 17.3 Definitions

The terms used in this clause have the following meanings:

- (a) "Operation of a system of records" means performance of any of the activities associated with maintaining the system of records on behalf of the Government including the collection, use and dissemination of records.
- (b) "Records" means any item, collection or grouping of information about an individual that is maintained by the District or Contractor on behalf of the Government, including, but not limited to, his education, financial transactions, medical history, and criminal or employment history and that contains his name, or the identifying number, symbol or other identifying particular assigned to the individual, such as a finger or voice print or a photograph.
- (c) "System of records" on individuals means a group of any records under the control of the District or Contractor on behalf of the Government from which information is retrieved by the name of the individual or by some identifying number, symbol or other identifying particular assigned to the individual.

#### 18.0 PATENT RIGHTS (Applicable only to research and development contracts)

If any invention, improvement or discovery of the District or contractors or subcontractors is conceived or first actually reduced to practice in the course of or under this project which invention, improvement, or discovery may be patentable under the Patent Laws of the United States of America or any foreign country, the District (with appropriate assistance of any contractor or subcontractor involved) shall immediately notify the Government (FTA) and provide a detailed report. The rights and responsibilities of the District, third party contractors and subcontractors and the Government with respect to such invention will be determined in accordance with applicable Federal laws, regulations, policies and any waivers thereof.

#### 19.0 RIGHTS IN DATA (Applicable only to research and development contracts)

The term "subject data" as used herein means recorded information, whether or not copyrighted, that is delivered or specified to be delivered under this Contract. The term includes graphic or pictorial delineation in media such as drawings or photographs; text in specifications or related performance or design-type documents, machine forms such as punched cards, magnetic tape or computer memory printouts; and information retained in computer memory. Examples include, but are not limited to, engineering drawings and associated lists, specifications, standards, process sheets, manuals, technical reports, catalog item identifications and related information. The term does not include financial reports, cost analyses and similar information incidental to contract administration.

All "subject data" first produced in the performance of this Agreement shall be the sole property of the Government. The District and Contractor agree not to assert any rights at common law or equity and not to establish any claim to statutory copyright in such data. Except for its own internal use, the District and Contractor shall not publish or reproduce such data in whole or in part, or in any manner or form, nor authorize others to do so, without the written consent of the Government until such time as the Government may have released such data to the public. This restriction, however, does not apply to Agreements with academic institutions.

The District and Contractor agree to grant and do hereby grant to the Government and to its officers, agents, and employees acting within the scope of their official duties, a royalty-free, non-exclusive and irrevocable license throughout the world:

- (a) To publish, translate, reproduce, deliver, perform, use and dispose of, in any manner, any and all data not first produced or composed in the performance of this Contract but which is incorporated in the work furnished under this Contract; and
- (b) To authorize others so to do.

District and Contractor shall indemnify and save and hold harmless the Government, its officers, agents, and employees acting within the scope of their official duties against any liability, including costs and expenses, resulting from any willful or intentional violation by the District and Contractor of proprietary rights, copyrights or

rights of privacy, arising out of the publication, translation, reproduction, delivery, performance, use, or disposition of any data furnished under this Contract.

Nothing contained in this clause shall imply a license to the Government under any patent or be construed as affecting the scope of any license or other right otherwise granted to the Government under any patent.

The third and fourth paragraphs under Section 19.0 above are not applicable to material furnished to the District or Contractor by the Government and incorporated in the work furnished under the Contract, provided that such incorporated material is identified by the District or Contractor at the time of delivery of such work.

In the event that the project, which is the subject of this Agreement, is not completed, for any reason whatsoever, all data generated under that project shall become subject data as defined in the Rights in Data clause in this Contract and shall be delivered as the Government may direct. This clause shall be included in all subcontracts under this Contract.

## 20.0 NEW RESTRICTIONS ON LOBBYING

### 20.1 Prohibition

- (a) Section 1352 of Title 31, U.S. Code, provides in part that no appropriated funds may be expended by the recipient of a Federal contract, grant, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered Federal actions: the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.
- (b) The prohibition does not apply as follows:
  - (i) Agency and legislative liaison by Own Employees.
  - (ii) Professional and technical services by Own Employees.
  - (iii) Reporting for Own Employees.
  - (iv) Professional and technical services by Other than Own Employees.

### 20.2 Disclosure

- (a) Each person who requests or receives from an agency a Federal contract shall file with that agency a certification, included in Form of Proposal or Bid Forms, that the person has not made, and will not make, any payment prohibited by Section 20.1 of this clause.
- (b) Each person who requests or receives from an agency a Federal contract shall file with that agency a disclosure form, Standard Form-LLL, "Disclosure of Lobbying Activities," if such person has made or has agreed to make any payment using non- appropriated funds (to include profits from any covered Federal action), which would be prohibited under Section 20.1 of this clause if paid for with appropriated funds.
- (c) Each person shall file a disclosure form at the end of each calendar quarter in which there occurs any event that requires disclosure or that materially affects the accuracy of the information contained in any disclosure form previously filed by such person under paragraph (c)(2) of this section. An event that materially affects the accuracy of the information reported includes:

- (i) a cumulative increase of \$25,000 or more in the amount paid or expected to be paid for influencing or attempting to influence a covered Federal action; or
  - (ii) a change in the person(s) or individual(s) influencing or attempting to influence a covered Federal action; or
  - (iii) a change in the officer(s), employee(s), or Member(s) contacted to influence or attempt to influence a covered Federal action.
- (d) Any person who requests or receives from a person referred to in paragraph (c)(i) of this section a subcontract exceeding \$100,000 at any tier under a Federal contract shall file a certification, and a disclosure form, if required, to the next tier above.
- (e) All disclosure forms, but not certifications, shall be forwarded from tier to tier until received by the person referred to in paragraph (c)(i) of this section. That person shall forward all disclosure forms to the agency.

### 20.3 Agreement

In accepting any contract resulting from this solicitation, the person submitting the offer agrees not to make any payment prohibited by this clause.

### 20.4 Penalties.

- (a) Any person who makes an expenditure prohibited under Section 20.1 of this clause shall be subject to a civil penalty of not less than \$10,000 for each such expenditure.
- (b) Any person who fails to file or amend the disclosure form to be filed or amended if required by this clause, shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.
- (c) Contractors may rely without liability on the representations made by their sub- contractors in the certification and disclosure form.

### 20.5 Cost allowability

Nothing in this clause is to be interpreted to make allowable or reasonable any costs which would be unallowable or unreasonable in accordance with Part 31 of the Federal Acquisition Regulation. Conversely, costs made specifically unallowable by the requirements in this clause will not be made allowable under any of the provisions of Part 31 of the Federal Acquisition Regulation.

## PART VII

### SANTA CRUZ METROPOLITAN TRANSIT DISTRICT PROTEST PROCEDURES

#### PROCUREMENT PROTESTS

All protests shall be filed, handled and resolved in a manner consistent with the requirements of Federal Transit Administration (FTA) Circular 4220.1E Third Party Contracting Guidelines dated June 19, 2003 and the Santa Cruz Metropolitan Transit District's (DISTRICT) Protest Procedures which are on file and available upon request.

Current FTA Policy states that: "Reviews of protests by FTA will be limited to:

- (1) a grantee's failure to have or follow its protest procedures, or its failure to review a complaint or protest; or
- (2) violation of Federal law or regulation.

An appeal to FTA must be received by the cognizant FTA regional or Headquarters Office within five (5) working days of the date the protester learned or should have learned of an adverse decision by the grantee or other basis of appeal to FTA" (FTA Circular 4220.1E, Section 7, paragraph 1., Written Protest Procedures)

Protests relating to the content of this Request for Proposal (RFP) package must be filed within ten (10) calendar days after the date the RFP is first advertised. Protests relating to a recommendation for award solicited by this RFP must be filed by an interested party within five (5) calendar days after the staff's written recommendation and notice of intent to award is issued to the offerors. The date of filing shall be the date of receipt of protests or appeals by the DISTRICT.

All Protests shall be filed in writing with the Assistant General Manager, Santa Cruz Metropolitan Transit District, 370 Encinal Street, Suite 100, Santa Cruz, CA 95060. **No other location shall be acceptable.** The DISTRICT will respond in detail to each substantive issue raised in the protest. The Assistant General Manager shall make a determination on the protest normally within ten (10) working days from receipt of protest. Any decision rendered by the Assistant General Manager may be appealed to the Board of Directors. The Protester has the right within five (5) working days of receipt of determination to file an appeal restating the basis of the protest and the grounds of the appeal. In the appeal, the Protester shall only be permitted to raise factual information previously provided in the protest or discovered subsequent to the Assistant General Manager's decision and directly related to the grounds of the protest. The Board of Directors has the authority to make a final determination and the Board of Director's decision shall constitute the DISTRICT's final administrative remedy.

In the event the protestor is not satisfied with the DISTRICT's final administrative determination, they may proceed within 90 days of the final decision to State Court for judicial relief. The Superior Court of the State of California for the County of Santa Cruz is the appropriate judicial authority having jurisdiction over Proposal Protest(s) and Appeal(s). Bid includes the term "offer" or "proposal" as used in the context of negotiated procurements.

The Offeror may withdraw its protest or appeal at any time before the DISTRICT issues a final decision.

Should the DISTRICT postpone the date of proposal submission owing to a protest or appeal of the solicitation specifications, addenda, dates or any other issue relating to this procurement, the DISTRICT shall notify, via addendum, all parties who are on record as having obtained a copy of the solicitation documents that an appeal/protest had been filed, and the due date for proposal submission shall be postponed until the DISTRICT has issued its final decision.

A letter of protest must set forth the grounds for protest and shall be fully supported with technical data, test results, or other pertinent information related to the subject being protested. The Protestor is responsible for adhering to the DISTRICT's protest procedures.

An Offeror may seek FTA review of the DISTRICT's decision. A protest appeal to the FTA must be filed in accordance with the provisions of FTA circular 4220.1E. Any appeal to the FTA shall be made not later than five (5) working days after a final decision is rendered under the DISTRICT's protest procedure. Protest appeals should be filed with:

Federal Transit Administration  
Regional Administrator Region IX  
201 Mission Street, Suite 2210  
San Francisco, CA 94105-1839

## Attachment A

### Comparing Joomla with Other Content Management Systems

Joomla is a content management system (CMS) and the clear choice for SCMTD, from the research that the IT Department has done to date. There are a dozen or so CMS competitors. Some are commercial and charge for their software. Several others, like Joomla, are open source and available without cost.

Comparisons tend to favor open source CMS options due to several features:

- Consumer friendly free downloads
- Strong documentation.
- Ongoing support and development
- Design-templates, and compenents to extend functionality are widely available BOTH free and commercially.

In addition to Joomla, other open source CMS's we looked into are *Mambo*, *Drupal*, *Open CMS*, *WordPress*, and *Zope*.

One thing all open source CMS have in common is they tend to work well with most operating environments. Joomla gets the higher marks mainly because of the strengths of its largely volunteer developer family.

The commercial CMS's are: *Vignette*, *Alfresco*, *RedDot CMS*, *Interwoven Teamsite*, *Tridion*, *Microsoft CMS*, *Oracle portal*, *Immediacy CMS*, *GOSS iCM*, and *Fatwire Content Server*.

When looking more closely through the list of commercial CMS contenders we find the licensing differs greatly. Additionally databases and related servers in addition to programming languages are similar but created specific differences depending on the applications.

The maturity of the current Joomla 1.5 architecture, and the vast community of developers, makes it an obvious choice. Industry observers state Joomla has a strong commitment to timely upgrades and new releases. Overall, when comparing features like: building applications, operability, performance and user friendliness, Joomla is reported to outrank 99.9% of all comers in every category.

# EXHIBIT -B-

## PART II

### GENERAL INFORMATION FORM

#### WEB SITE REDESIGN AND IMPLEMENTATION

RFP No. 09-04

(To be completed by the offeror and placed at the front of your proposal)

JABICO ENTERPRISES 1/5/2008  
Legal Name of Firm Date

505 RIVER ST. SUITE A, SANTA ANA, CA 92705  
Firm's Address

931.454.0850 931.454.0847  
Telephone Number FAX Number

LLC 56-2365789  
Type of Organization (Partnership, Corporation, etc.) Tax ID Number

Offeror understands and agrees that, by his/her signature, if awarded the contract for the project, he/she is entering into a contract with the District that incorporates the terms and conditions of the entire Request for Proposals package, including the General Conditions section of the Request for Proposals. Offeror understands that this proposal constitutes a firm offer to the District that cannot be withdrawn for ninety (90) calendar days from the date of the deadline for receipt of proposals. If awarded the contract, offeror agrees to deliver to the District the required insurance certificates within ten (10) calendar days of the Notice of Award.

[Signature]  
Signature of Authorized Principal

CARL HERMAN / PRESIDENT  
Name of Principal-in-Charge and Title

\_\_\_\_\_  
Name of Project Manager and Title

CARL HERMAN / GHERMAN@JABICO.COM  
Name, Title, Email Address and Phone Number of Person To Whom Correspondence Should be Directed

\_\_\_\_\_  
Addresses Where Correspondence Should Be Sent

DEVELOPMENT, DESIGN  
Areas of Responsibility of Prime Contractor

Listing of major sub consultants proposed (if applicable), their phone numbers, and areas of responsibility (indicate which firms are DBE's):

ILUMINADA DESIGN - LOGO, GRAPHICS.  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**CERTIFICATION OF PROPOSED CONTRACTOR REGARDING DEBARMENT,  
SUSPENSION AND OTHER INELIGIBILITY AND VOLUNTARY EXCLUSION**

(Contractor) JABCO ENTERPRISES certifies to the best of its knowledge and belief, that it and its principals:

Are not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency;

Have not within a three year period preceding this bid been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements or receiving stolen property;

Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (2) of this certification; and

Have not within a three year period preceding this bid had one or more public transactions (Federal, State or local) terminated for cause or default.

If the Proposed Subcontractor is unable to certify to any of the statements in this certification, it shall attach an explanation to this certification.

(Contractor) JABCO, CERTIFIES OR AFFIRMS THE TRUTHFULNESS AND ACCURACY OF THE CONTENTS OF THE STATEMENTS SUBMITTED ON OR WITH THIS CERTIFICATION AND UNDERSTANDS THAT THE PROVISIONS OF 31 U.S.C. SECTIONS 3801 ET. SEQ. ARE APPLICABLE THERETO.

 / PRESIDENT

Signature and Title of Authorized Official

**LOBBYING CERTIFICATION**  
(Only for Contracts above \$100,000)

**Lobbying Certification for Contracts Grants, Loans and Cooperative Agreements (Pursuant to 49 CFR Part 20, Appendix A)**

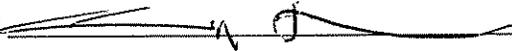
The undersigned certifies, to the best of his or her knowledge and belief, that:

- (1) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal Contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal Contract, grant, loan, or cooperative agreement.
- (2) If any funds other than Federal appropriated funds have been paid or will be paid to any person for making lobbying contacts to an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal Contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form--LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions and as amended by "Government wide Guidance for New Restrictions on Lobbying," 61 Fed. Reg. 1413 (1/19/96).
- (3) The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts, sub grants, and Contracts under grants, loans, and cooperative agreements) and that all sub recipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352 (as amended by the Lobbying Disclosure Act of 1995). Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The Bidder/Offeror certifies or affirms the truthfulness and accuracy of each statement of its certification and disclosure, if any. In addition, the Bidder/Offeror understands and agrees that the provisions of 31 U.S.C. A 3801, et seq. apply to this certification and disclosure, if any.

Firm Name JABCO ENTERPRISES

Signature of Authorized Official 

Name and Title of Authorized Official CAROL HERMAN / PRESIDENT

Date 1/5/08

**BUY AMERICA CERTIFICATION**  
**(Only for Contracts above \$100,000)**

This procurement is subject to the Federal Transit Administration Buy America Requirements in 49 CFR part 661.

A Buy American Certificate, as per attached format, must be completed and submitted with the bid. A bid which does not include the certificate will be considered non-responsive.

A false certification is a criminal act in violation of 18 U.S.C. 1001. Should this procurement be investigated, the successful bidder/proposer has the burden of proof to establish that it is in compliance.

A waiver from the Buy America Provision may be sought by SCMTD if grounds for the waiver exist.

Section 165(a) of the Surface Transportation Act of 1982 permits FTA participation on this contract only if steel and manufactured products used in the contract are produced in the United States.

**BUY AMERICA CERTIFICATE**

The bidder hereby certifies that it will comply with the requirements of Section 165(a) or (b) (3) of the Surface Transportation Assistance Act of 1982, and the applicable regulations in 49 CFR Part 661.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Company Name: \_\_\_\_\_

Title: \_\_\_\_\_

OR

The bidder hereby certifies that it cannot comply with the requirements of Section 165(a) or (b) (3) of the Surface Transportation Act of 1982, but may qualify for an exception to the requirement pursuant to Section 165(b)(2) or (b)(4) of the Surface Transportation Assistance Act of 1982, as amended, and regulations in 49 CFR 661.7.

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Company Name: \_\_\_\_\_

Title: \_\_\_\_\_

# CONTRACTOR DBE INFORMATION

CONTRACTOR'S NAME \_\_\_\_\_ CONTRACTOR'S ADDRESS \_\_\_\_\_  
 DBE GOAL FROM CONTRACT \_\_\_\_\_ % \_\_\_\_\_  
 FED. NO. \_\_\_\_\_  
 COUNTY \_\_\_\_\_ PROPOSAL AMOUNT \$ \_\_\_\_\_  
 AGENCY \_\_\_\_\_ PROPOSAL OPENING DATE \_\_\_\_\_  
 CONTRACT NO. \_\_\_\_\_ DATE OF DBE CERTIFICATION \_\_\_\_\_  
 SOURCE \*\* \_\_\_\_\_

This information must be submitted during the initial negotiations with the District. By submitting a proposal, offeror certifies that he/she is in compliance with the District's policy. Failure to submit the required DBE information by the time specified will be grounds for finding the proposal non-responsive.

CONTRACT ITEM NO.	ITEM OF WORK AND DESCRIPTION OF WORK OR SERVICES TO BE SUBCONTRACTED OR MATERIALS TO BE PROVIDED *	CERTIFICATION FILE NUMBER	NAME OF DBE	DOLLAR AMOUNT DBE ***	PERCENT DBE
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NOT APPLICABLE FOR THIS PROJECT

TOTAL CLAIMED DBE  
 PARTICIPATION \$ \_\_\_\_\_ %

\_\_\_\_\_  
SIGNATURE OF CONTRACTOR

\_\_\_\_\_  
DATE

\_\_\_\_\_  
AREA CODE/TELEPHONE

(Detach from proposal if DBE information is not submitted with proposal.)

- \* If 100% of item is not to be performed or furnished by DBE, describe exact portion, including plan location of work to be performed, of item to be performed or furnished by DBE.
- \*\* DBE's must be certified on the date proposals are opened.
- \*\*\* Credit for a DBE supplier who is not a manufacturer is limited to 60% of the amount paid to the supplier.

**NOTE:** Disadvantaged business must renew their certification annually by submitting certification questionnaires in advance of expiration of current certification. Those not on a current list cannot be considered as certified.

# CONTRACTOR DBE INFORMATION

CONTRACT ITEM NO.	ITEM OF WORK AND DESCRIPTION OF WORK OR SERVICES TO BE SUBCONTRACTED OR MATERIALS TO BE PROVIDED *	CERTIFICATION FILE NUMBER	NAME OF DBE	DOLLAR AMOUNT DBE ***	PERCENT DBE
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TOTAL CLAIMED DBE  
PARTICIPATION      \$ \_\_\_\_\_      \_\_\_\_\_ %

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# Website Development Proposal

## SCMTD

**Date:** January 5<sup>th</sup>, 2009

**Project:** SCMTD

**Contact:** Gary Herman, President  
Jabico Enterprises, LLC  
[gherman@jabico.com](mailto:gherman@jabico.com)  
831.454.0850

# Table Of Contents

1 0	About Jabico	1
1 1	Coding Standards	1
2 0	Web Development	2
2 1	Phase I – Discovery Phase	3
2 2	Phase II – Site Subject Category Reorganization / Site Map	3
2 3	Phase III – Updated Rendition of Metro Logo	3
2 4	Phase IV – Site Template (Look and Feel)	3
2 5	Phase V – Integrate Site Templates within the Joomla CMS	4
2 6	Phase VI – Create Dynamic Content Pages	4
2 7	Phase VII – Workflow Customization	4
2 8	Phase VIII – Integrate News (Press Release) Module	4
2 9	Phase IX – RSS Feeds	5
2 10	Phase X – Migration of Current Site Content	5
2 11	Phase XI – Bilingual Component	5
2 12	Phase XII – Targeted Email Component	5
2 13	Phase XIII – Customer Service Report Ticket Tracking Component	6
2 14	Phase XIV – Integrate E-Commerce System	6
2 15	Phase XV – System Map Integration and Design Review	6
2 16	Phase XVI – Schedule Publishing System	7
2 17	Phase XVII – Changes Determined From Focus Group	7
2 18	Phase XVIII – Training and Documentation	8
2 19	Phase XIX – Google Analytics and Site Map Integration	8
2 20	Phase XX – Assist in Preservation of Google Rankings (Redirect)	8
2 21	Phase XXI – Initial SEO Consultation (Meta Tags and Keywords)	8
2 22	Phase XXII – Project Management	9
2 23	Phase XXIII – Testing & Publish	9
3 0	Web Development Optional Phases	10
3 1	Option I – Document Management System	10
3 2	Option II – iPhone and Mobile Tools	10
3 3	Option III – Organizational Bio Tool	10
4 0	Reference Information	11
5 0	Project Personnel	12
6 0	Project Estimate	14
6 1	Web Creation	14
6 2	Additional Work	15
7 0	Terms and Conditions	16
8 0	Client Data Sheet	17



SCMTD seeks design and development services to build and maintain a new website based on the specifications submitted to Jabico via an RFP. **Jabico Enterprises, LLC (Jabico)** presents the enclosed proposal to delineate our recommendations to develop the website.

## 1.0 About Jabico

**Jabico Enterprises, LLC** provides a variety of Web solutions, including Web creation, hosting, online promotion, Search Engine Optimization, logo design and identity branding. The company is headquartered in Santa Cruz, and is a leading Web Solutions provider meeting the needs of businesses and individuals throughout the U.S.

We service a diverse clientele in various industries, from education to government to business consulting, from high-tech to non-profit, from independent retail establishments to physicians, from stock photography to insurance, from radio stations to corporate hospitality...and more.

### 1.1 Coding Standards

Web development standards have grown to encompass a wide body of scripting languages to increase the richness and functionality within sites and to aid in the protection of code against future obsolescence. These standards go beyond the days of standard HTML scripting to include advanced and centralized presentation control (CSS), self describing datasets (XML), legacy application and client side integration control (Web Services), and advanced future browser compatibility through stricter enforcement of scripting resulting in more reliable HTML (XHTML). Using these standards and proven methodologies in project management and code development, our development team has been able to encapsulate the above along with finely tuned common industry practices to increase the effective life of our code and decrease overall development time resulting in a flexible cost effective solution. Using properly formed CSS and well formed HTML our team is able to meet the most recent standards put forth by the ADA and WAI (as defined by the W3C) to accommodate accessibility requirements, such as text readers, while also meeting the differing needs for cross-browser compatibility.

Over time our development team has carefully evaluated and selected specific standards that have proven to be advantageous to the rapid development of web projects. Additionally, we incorporate our own well established coding and project management techniques, based on industry common practices, resulting in a streamlined set of guidelines that we leverage in each and every project. Using this framework, our team is able to enhance the ability of project code to flex and grow in evolutionary phases that may not be apparent at the time of development and which lower the total cost of ownership for our clients.

#### Project Management Standards

Jabico Enterprises, LLC has selected the most efficient sections of an industry standard project management methodology, 'Extreme Programming', to streamline the overall development process, lower costs, leverage more client control over the direction of projects in real-time, and reduce the amount of changes that are typically required to produce the desired result. This approach allows our development team to more closely interact with the needs of our clients and allows for changes to overall design principles to be addressed during the early, less costly phases of a project.

## 2.0 Web Development

The following provides a brief overview of our approach to develop the project. **Jabico** has developed a prescribed process to ensure the end product meets client objectives. It has been proven that this process minimizes the opportunities for disconnects during the project and leads to a greater degree of success.

### **Summary:**

The client has requested that this site be designed using the Joomla CMS framework and additional modules to provide the specified functionality within the RFP. Jabico has a vast array of experience implementing CMS systems as well as 2 production CMS systems designed by Jabico and in use by Jabico clients. Currently our team works primarily with both of our in-house CMS tools (ChameleonCMS and JabicoCMS) as well as other CMS frameworks such as Drupal, FarCry, Microsoft Sharepoint, etc... Our long history and expert experience with PHP has allowed our team to excel at CMS development for all of our clients on a regular basis.

Our team will use Joomla to meet the specifications contained within the RFP, outlined in the following proposal and leverage Joomla components to further extend functionality as needed. We may also find a need to custom build components for Joomla to further enhance the overall options available to our development team. During the course of this project we will interface with the SCMTD staff to determine the best course of action when multiple options for components exist and provide SCMTD staff with related suggestions.

Client involvement is integral to meeting expectations and deliverables. Phases and associated deliverables for the SCMTD project are delineated below.

### 2.1 Phase I – Discovery Phase

The Jabico Development team will review client objectives and site functionality during this phase. Specific site framework and administrative functions will be reviewed and any additional specifications will be added during this phase (in which case a Proposal Addendum will be created and delivered to the client for approval). Collateral will also be reviewed and specific information to be re-used within the site will be discussed.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>8 - 12</b>
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- NA

### 2.2 Phase II – Site Subject Category Reorganization / Site Map

During this phase our team will work the SCMTD staff to reorganize site subjects and categories. Using our messy meeting philosophy our team will present rough outlines for reorganization options and hash out mockups for use within the site template design phase. These meetings will also culminate in the rough outline or finalized outline of the site map to be used throughout the development of this project. Sitemap information is flexible and can change easily as we progress through the later phases as needed.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>4 - 8</b>
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- Site Subject Category Reorganization Mockups and Outline
- Rough or finalized Sitemap template

### 2.3 Phase III – Updated Rendition of Metro Logo

Working with our Graphic Design partners, Iluminada Design, we will develop an updated rendition of the Metro logo (to include several revisions as we work through the graphic development process). Our graphic design partners will develop a new logo based on criteria identified within the Discovery phase and will provide the SCMTD with revisions of this logo from which to chose. Each revision process should get us closer to the final logo design, which once approved will serve as a center point from which the site template will be created.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>8 - 12</b>
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- Updated Rendition of the Metro Logo
- Revision Process Included

### 2.4 Phase IV – Site Template (Look and Feel)

The Jabico Development team will work directly with the client to produce a site template, based on criteria provided by the client. Collateral needed to complete the template will be provided by the client and should include reference sites, current branding and marketing material. We will polish the templates and test user-interface designs within reason. Most importantly, the client will have an opportunity to review and approve mockups throughout the revision process before moving forward.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>20 - 32</b>
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- Site Templates

## 2.5 Phase V – Integrate Site Templates within the Joomla CMS

During this phase the site template will be integrated with the Joomla Content Management System. This will allow the client to easily update site information using an internet browser. Jabico will setup and configure user accounts, access permissions, content tools, and foundation navigation for the site template. The WYSIWYG tool will be customized to include the styles used throughout the site to allow administrators to easily maintain consistency between content pages.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>4 - 6</b>
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- Site Template Integration and Administration system Configuration

## 2.6 Phase VI – Create Dynamic Content Pages

During this phase we will create placeholder pages for dynamic content, for example such pages include: Home Page (with aggregate information, such as current news and alike), Contact Us, and About Us. Our team will use sample content to test the site and to display functionality for the client to view. Actual content will be added by the client during deployment. Jabico can assist with this process; however such work is not included in the current estimate.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>14 - 16</b>
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- Dynamic Content Pages
- Navigation Elements (including Footer Navigation for ADA)
- CSS Style Sheet for centralized look and feel administration

## 2.7 Phase VII – Workflow Customization

During this phase our team will work with the SCMTD to customize the workflow rules for creating and publishing content throughout the site. These tools will be created to match the current or projected business processes needed to maintain this site currently and in the future. Additional training will be provided at the end of the project to educate administrators on the potential modifications that can be made to the work-flow system if such changes are needed.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>5 - 6</b>
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- Workflow Customization

## 2.8 Phase VIII – Integrate News (Press Release) Module

During this phase our team will integrate a Joomla News module and customize this module to match the look and feel of the site. This module will allow administrators to add new News items, edit current news items and de-activate old news items. Possible customization to include a separate event management module may be chosen to enhance event management at an additional cost; however it is possible to use the current News Module to manage events with limited functionality.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>4 - 6</b>
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- News Module

## 2.9 Phase IX – RSS Feeds

During this phase our team will customize and configure the syndication parameters within Joomla as required within the RFP. These tools should suffice for the needs defined within the RFP, however additional RSS options exist should they need to be explored. RSS feeds can be customized to work in a variety of ways including different formats and alike. Our team will provide guidance in this area and complete the RSS setup to work within the multiple departments within the SCMTD. Additional training can be provided during the training phase to assist in managing RSS feeds over time.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>2 - 3</b>
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- RSS Feed Customization and Configuration

## 2.10 Phase X – Migration of Current Site Content

The Jabico team will work with SCMTD staff to migrate all current content over to the new Joomla based system. Using the Joomla content creation and administration systems our team will oversee and complete the migration process. This might be a good time to engage SCMTD personnel in creating and administering content as a training scenario with Jabico assisting throughout the process (which would potentially lower the overall estimate for this section should SCMTD staff members be involved).

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>32 - 46</b>
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- Migration of Current Site Content

## 2.11 Phase XI – Bilingual Component

There are many options that exist in making a site work effectively in multiple language formats, of which we suggest using something within Joomla to manage such content in the least obtrusive way. One component that looks promising and will meet the requirements suggested within the RFP is Joom!Fish. This component includes a versatile management system to manage multi-language content, which can become quite a process over time. The most essential feature needed within such a system is the ability to version multi-language content and fill in missing language content where needed (especially during the initial phases of the project). Our team will discuss and evaluate this component as well as others during the discovery phase and work with the SCMTD staff to choose the more effective package available.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>6 - 8</b>
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- Bilingual Component Integration and Setup

## 2.12 Phase XII – Targeted Email Component

During this phase our team will setup and configure a Targeted Email Component for mass mailing within the new SCMTD system. Various components are available to support this functionality including an old PHP favorite called PHPList. Our team will present the SCMTD staff with various suggested options and discuss the benefits of integration relative to each option. Most importantly the system will need to incorporate bounce-back administration and redundancy filters (of which PHPList has such capabilities). Our team will conduct testing to verify that this component meets the needs of the current RFP and will customize this component as needed.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>8 - 12</b>
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- Targeted Email Component

### 2.13 Phase XIII – Customer Service Report Ticket Tracking Component

Using a standard ticketing system will allow the SCMTD staff to readily manage incoming comments, complaints, and general customer communication (as well as potentially being used to manage internal help-desk needs). This component can be custom built or an Joomla extension may be used – of which we would highly suggest RSTickets. This component will allow for easy tracking and statistic reporting, custom form creation for different departments, email lists, etc...

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>8 - 10</b>
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- Employee Representative Invitation Tools

### 2.14 Phase XIV – Integrate E-Commerce System

During this phase we will be modifying an E-Commerce module to match the look and feel of the overall site design. Many E-Commerce modules exist – some of our most successful implementations use OSCcommerce (an older, very functional, stable solution) or Magneto (a newer, more complex functional system) – both of which have bridges available for Joomla. Other components that are available to meet the needs of this RFP include Virtumart, which seems to be a very popular extension and offers quite a bit of functionality. Once the E-commerce template is complete using one of the modules (to be decided during the Discovery meeting) our team will customize product overviews and details as approved in the Discovery Phase. Additionally, this system will be linked to the payment processing system to facilitate automated online financial transactions to complete the overall shopping experience. This module should include a robust management interface allowing personnel to add, edit, update and manage all aspects of the storefront including payment processing, fulfillment tracking, and sales reporting. Everything from Bus Passes to material goods will be managed through this one system and fully integrated within the Joomla interface.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>18 - 24</b>
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- E-Commerce Shopping System
- SSL Certificate Setup
- Payment Gateway Configuration and Testing

*\* A merchant account and payment gateway solution will be required to complete the e-commerce component integration. We suggest that you contact your bank to find out more about setting up such accounts and to determine which payment gateway to chose. Most e-commerce systems support a variety of payment gateways however if possible we highly suggest the use of Authorize net as it is the best supported and mature system we've had experience working with. If Authorize net is not available we can work with SCMTD staff and associated banking personnel to select an appropriate replacement option.*

### 2.15 Phase XV – System Map Integration and Design Review

Using the interactive system map currently being developed by the SCMTD IT department our team will leverage current design models to assist in the overall presentation of this system and integrate this component within the Joomla framework. Our team has a strong background in Ajax development and will provide additional feedback in way of the user interface as to expose the SCMTD team to optional enhancements. We expect that a straight migration with custom integration points will work best – however, we would suggest that such a solution be driven by a database component that we can later use to enhance the overall scheduling system and allow for filter based searches enhancing the overall user experience. While this option might require a bit more time to complete the future leverage this will provide to overall site

enhancements would be quite substantial. At this time it is not known whether or not this system incorporates a backend or related management tools – of which are not included in the estimate below. Should such management tools need to be integrated as well we can add more time as needed to complete this. Additionally, we can assist in building out such management tools or API's as requested. Some of these ideas are included at the end of this proposal as optional items.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>12 - 16</b>
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- System Map Integration and Design Review

### **2.16 Phase XVI – Schedule Publishing System**

During this phase our team will build a customized module to allow SCMTD staff to manage, update, and edit bus routes and schedule information. This system will be database driven for further extendibility (such as the incorporation and linkage between this tool and System Map tool). Staff members will be able to easily edit schedule information that will be displayed to end users. Users of this system will be able to view schedules based on categorical information and search criteria, allowing for the filtering of results by day, sub-selection of dates, inbound and outbound routes. Further enhancements of this system should be discussed during the Discovery process as we see some opportunity here to effectively engage users in an effort to deliver schedule information in the most simple and robust format possible. Such enhancements might include a destination search tool that will allow users to search for a bus route closest to where they are planning to travel or travel from. This system will also include the ability to share PDF formats of the schedule (which can also be dynamically created using the database components within the scope of this tool – not currently included in the estimate below).

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>20 - 32</b>
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- Schedule Publishing System – Management Components
- Schedule Publishing System – User Presentation and Search Components
- Schedule Publishing System – PDF Storage and Presentation Component

### **2.17 Phase XVII – Changes Determined From Focus Group**

It would be most effective to set aside a block of time to conduct the change requests determined by the Focus Group – while it's not entirely possible to estimate these changes we've provided a block of time estimate below which we believe will meet these requirements based on previous experience. Of course this estimate may need to change and should be discussed following the Focus Group meeting. Our suggestion here would be to budget for the base case scenario as defined in the estimate below but provide a follow-up meeting agenda to discuss these changes in general. We've assumed that a meeting to discuss this changes should be included in this estimate and have made accommodations as such.

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<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>20 - 40</b>
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- Change Request Meeting
- Change Request Implementation as Determined from Focus Group and Meeting
- Review of Implemented Change Requests

## 2.18 Phase XVIII – Training and Documentation

During this phase our team will provide SCMTD staff with training on the Joomla system, the installed components and the customized tools created for this project. Jabico will also provide SCMTD staff with streamlined documentation to use for ongoing reference material. The estimate below should cover enough basic training to ramp up staff, however Jabico will be available for additional training and consulting on a time and materials basis should this be needed (at the request of client). Additional training considerations should be discussed and documented during the Discovery phase to make sure that we meet the needs of the SCMTD staff. Additional documentation links for purchased or downloaded components will be provided as part of the overall documentation package. Should a more formal package be required Jabico can accommodate such needs as requested.

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>14 - 22</b>
<ul style="list-style-type: none"><li>• Training</li><li>• Documentation</li></ul>		

## 2.19 Phase XIX – Google Analytics and Site Map Integration

During this phase our team will register the SCMTD site within the Google Site Maps tool and add Google Analytics code to the header of all pages within the site. This will finalize the connections needed for site statistics and for Google to crawl the Site Maps page.

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>4 - 6</b>
<ul style="list-style-type: none"><li>• Google Analytics UTM Module Scripting and Testing</li><li>• Google Site Map Listing</li><li>• XML for Sitemap Listing</li></ul>		

## 2.20 Phase XX – Assist in Preservation of Google Rankings (Redirect)

During this phase our team will map out all pages indexed by Google and prepare redirects so that these indexes and rankings can be preserved when moving from the old HTML pages to the new PHP pages. It's imperative this phase be completed with due diligence as to not lose current rankings within Google and other Search Engines.

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>4 - 6</b>
<ul style="list-style-type: none"><li>• Create proper search engine friendly redirects using best practices</li></ul>		

## 2.21 Phase XXI – Initial SEO Consultation (Meta Tags and Keywords)

Using our expertise in the are of Search Engine Optimization (SEO) our team will consult with SCMTD to assess the best use of targeted keywords and meta-tags within the site. Once these targeted keywords are assessed, our team will use the ChameleonCMS meta-tag tools to implement these keywords. Additionally, our team will provide a benchmarked analysis of the current site, the new site and three monthly search engine reports. Additional search engine optimization consultation and ongoing maintenance is available but not included within this estimate (if such consultation or maintenance is needed, we can provide a separate estimate for such work as requested).

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>12 - 16</b>
<ul style="list-style-type: none"><li>• Initial SEO Consultation</li></ul>		

- Selection of targeted keywords and implementation using meta-tags
- Benchmark reports and 3 monthly SEO overview reports with major search engines.

## 2.22 Phase XXII – Project Management

During the course of the Project our internal team will oversee the development of this project and conduct meetings (via phone, email, or in person) with the SCMTD Project staff to facilitate the successful and efficient deployment of this project. Project Management hours are streamlined to effectively manage all aspects of a project without burdening the client with additional and unnecessary overhead.

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>14 - 18</b>
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- NA

## 2.23 Phase XXIII – Testing & Publish

Testing is a vital phase for any kind of development. During this phase, we will make sure that all changes are working properly and in no way reduce the effectiveness of the current Web site. Our extensive array of testing techniques will keep this process down to a minimum while not sacrificing the end result of well tested code. Additionally, we will invite the client to test the site using their own team before publishing live, if so desired.

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>26 - 34</b>
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- Finalized testing and quality control, bug fixes to code, link checking
- Testing on various browser platforms to insure interoperability.
- Validate code to ensure it contains valid HTML according to World Wide Web Consortium (W3C) requirements.
- Push site live to server and retest all forms, content links, and system functionality.

## 3.0 Web Development Optional Phases

The following provides a brief overview of Optional Phases that can be included in development, now or later, on an ala-carte basis (not currently included in the total estimate).

### 3.1 Option I – Document Management System

During this phase our team will customize the Joomla document management module to provide SCMTD with facilities to add, edit, delete, and manage documents for various document categories (such as the Library, Downloads, Membership Forms, etc...). This system will include a search interface, meta-information management for documents (such as title, description, author, etc...) as required, and archive management for pruning document storage when needed.

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>8 - 10</b>
<ul style="list-style-type: none"><li>• Document Management Module</li><li>• Document Management Display Page with Search Functionality</li><li>• Document Category Management Tools</li><li>• Archive Management Tools</li></ul>		

### 3.2 Option II – iPhone and Mobile Tools

The iPhone now includes maps of current bus lines within it's Maps tool – however, a more robust and full featured system that supports such mobile use of the site might better provide access to other mobile phone users. A mobile application might be well suited here to allow a greater audience the ability to easily access schedule information from places in which a computer is not accessible.

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>16 - 32</b>
<ul style="list-style-type: none"><li>• iPhone and Mobile Tools</li></ul>		

### 3.3 Option III – Organizational Bio Tool

Our team will customize a tool to allow administrators to update and manage organizational bios. The bio tool will store and display general information about key team members, allow for the uploading of one photo per bio, and facilitate the ability to sort bios as needed. Additional modifications can be added as needed, but are not covered in the estimate below. The Bio Tool will also include a web 2.0 interface enhancements called lightbox, which allows users to hover over a Bio picture and see Bio information appear in a sudo-pop-up box without having to click through to another page.

<b>Deliverables</b>	<b>Budgeted Hours</b>	<b>4 - 6</b>
<ul style="list-style-type: none"><li>• Organizational Bio Tool</li></ul>		

## 4.0 Reference Information

**Jabico** has a myriad of references that range from small to large within a wide array of differing industries. The following information is considered confidential and should not be shared within anyone outside of your organization. If a need arises to share this information with additional parties please request permission to do so from the contact person listed on the cover of this proposal. Jabico values the privacy of our clients and makes every effort to protect our clients from unsolicited business communication; all clients listed below have been previously agreed to serve as references for Jabico. Furthermore, the following client list has been chosen to meet the specific reference criteria relating to this project. Should you need additional reference material please contact us at anytime to request additional information.

### References:

Client Name: **University of California Summer Session (25 – 30K)**  
Contact Person: Patricia Vani - (Director)  
Phone: 831.459.2525  
Email: [pvani@ucsc.edu](mailto:pvani@ucsc.edu)  
Website: <http://summer.ucsc.edu>

Client Name: **Triage Consulting Group (125 – 200K)**  
Contact Person: Brian Neece - (Principal)  
Phone: 415.371.6205  
Email: [briann@triageconsulting.com](mailto:briann@triageconsulting.com)  
Website: <http://www.triageconsulting.com>

Client Name: **SACNAS (30 – 100K – ongoing)**  
Contact Person: Tanya Beat - (Program Director)  
Phone: 831.459.0170 x241  
Email: [tanya@sacnas.org](mailto:tanya@sacnas.org)  
Website: <http://www.sacnas.org>

### Reference Sites:

- > <http://summer.ucsc.edu>
- > <http://www.triageconsulting.com>
- > <http://www.sacnas.org>
- > <http://www.cabovillas.com>
- > <http://www.naturipefarms.com>
- > <http://www.boomerangproject.com>
- > <http://www.santacruz.org>

## 5.0 Project Personnel

**Jabico** has a team of experienced developers that will be working together on this project. Our team has over 10+ years of experience in developing websites for a myriad of industries and are all well aware of current development standards, accessibility issues and how to overcome them, browser issues (platform independent and otherwise), best practices, cutting edge development practices using web 2.0 technologies, and a strong background in traditional software development practices (including OO pattern development, scalable and optimized code development, with a strong emphasis on secure coding practices). Following is a list of lead personnel we expect to be on this project (additional staff members will also be involved):

### >> Project Manager: Gary Herman

#### Technologies

**Layout Applications:** Adobe Illustrator, Photoshop, Fireworks

**Languages/Technologies:** C/C++, ColdFusion MX, XML [DOM, SAX], PHP4/5, UNIX shell scripting, ANSI SQL-92, XHTML/JavaScript/CSS, AJAX, ASP/VbScript

**Databases:** MySQL, Microsoft SQL Server 2000, Oracle

**API Frameworks:** MachII (ColdFusion), FuseBox (ColdFusion), Smarty Templating Engine (PHP), ColdBox, CakePHP (PHP), PEAR DB (DB Abstraction API)

**Application Servers:** ColdFusion 2008, PHP, IIS, Apache

**Operating Systems:** UNIX (Linux/Solaris/FreeBSD), MacOS X, MS Windows (XP/Server 2003).

#### Professional Experience

**Jabico Enterprises** Santa Cruz, CA [2001 – Current]

*President / Software Architect / Senior Engineer*

- Architected, implemented and currently maintain 2 proprietary content management solutions, one in ColdFusion and one in PHP.
- Developed core User Interface libraries in object-oriented PHP, Cold Fusion and ASP. Implemented API driven User Interface controls for re-usability of core components and Javascript modules.
- Interfaced with hundreds of clients on projects ranging from simple website front-ends to extremely complicated student admission control systems for UCSC.

**The Igneous Group** Santa Cruz, CA [1999 – 2001]

*Lead Research Engineer / Senior Engineer*

- In charge of implementing cutting edge technology, researching such technology and developing tools to allow a development team of 20 engineers to successfully build and maintain very large websites and software applications in ColdFusion.
- Built a dynamic exam/survey/polling system in ColdFusion for our team to use throughout projects within our proprietary CMS tool. Successfully deployed over 100,000 lines of code relating to this project within a tight timeline. Developed control systems for better user interface experiences within a proprietary CMS system.

**Progeny Advanced Genetics** Salinas, CA [1997 – 1999]

*Director of IT / Senior Programmer*

- Managed all aspects of a Windows/Novell network.
- Programmed and maintained a genetic comparison tool to allow researchers to better understand the results of genetic testing and allow our product development team to bring products to market faster
- Implemented and configured Great Plains Dynamics accounting system.

#### Education

- Computer Engineering / Philosophy – Rutgers University, New Brunswick, NJ
- MCSE

## >> Lead Developer: Constantione Krotcov

### Technologies

**Layout Applications:** Adobe Illustrator, Photoshop, Fireworks

**Languages/Technologies:** C/C++, ColdFusion MX, XML [DOM, SAX], PHP4/5, UNIX shell scripting, ANSI SQL-92, XHTML/JavaScript/CSS, AJAX, ASP/VbScript

**Databases:** MySQL, Microsoft SQL Server 2000, Oracle

**API Frameworks:** MachII (ColdFusion), FuseBox (ColdFusion), Smarty Templating Engine (PHP), CakePHP (PHP), PEAR DB (DB Abstraction API)

**Application Servers:** Adobe ColdFusion 2008, PHP, IIS

**Operating Systems:** UNIX (Linux/Solaris/FreeBSD), MacOS X, MS Windows (XP/Server 2003).

### Professional Experience

**Jabico Enterprises** Santa Cruz, CA [2003 – Current]

#### *Engineer*

- Assisted in developing highly-scalable object-oriented PHP/MySQL Content Management Systems using our proprietary Model-View-Controller (MVC) framework and PEAR DB.
- Developed core User Interface libraries in object-oriented PHP, Cold Fusion and ASP. Implemented API driven User Interface controls for re-usability of core components and Javascript modules.
- Developed foundation classes in PHP for database abstraction layer and worked on implementation. Exposed development team to cakePHP.
- Developed 20+ websites using object oriented PHP framework and UI API (collectively known as ChameleonCMS).
- Worked on AJAX component research and development for enhanced UI functionality

**Freelance** Santa Cruz, CA. [2003 – 2004]

#### *Consultant Developer*

- Built websites using PHP and MySQL. Implemented DHTML functionality using Javascript and CSS.

**Mind Projection Solutions** Duluth, MN. [2002 – 2003]

#### *Programmer*

- Developed PHP based administration system for a property management service provider
- Managed back-end system for service provider and served as technical liason, technical support specialist and programmer.

### Education

- Ongoing major in Mathematics - University of California, Santa Cruz, CA
- Minor in Electronic Music, University GPA – 3.4

## 6.0 Project Estimate

**Jabico** provides the following pricing matrix with the understanding that there may be variations in each area of services. We will provide progress reports to ensure the project stays within projected budget estimates. During the course of this engagement, **Jabico** will utilize different disciplines in order to complete the estimated scope of work detailed herein. **Jabico** estimates the level of effort required to complete the baseline requirements as listed herein. **SCMTD** will only be billed for time spent on project based on our hourly rate schedule.

### 6.1 Web Creation

Phase	Estimated Time		Rate (\$)	Estimated Costs	
	Low	High		Low	High
Phase I	8	12	\$100.00	\$800.00	\$1,200.00
Phase II	4	8	\$100.00	\$400.00	\$800.00
Phase III	8	12	\$100.00	\$800.00	\$1,200.00
Phase IV	20	32	\$100.00	\$2,000.00	\$3,200.00
Phase V	4	6	\$100.00	\$400.00	\$600.00
Phase VI	14	16	\$100.00	\$1,400.00	\$1,600.00
Phase VII	5	6	\$100.00	\$500.00	\$600.00
Phase VIII	4	6	\$100.00	\$400.00	\$600.00
Phase IX	2	3	\$100.00	\$200.00	\$300.00
Phase X	32	46	\$100.00	\$3,200.00	\$4,600.00
Phase XI	6	8	\$100.00	\$600.00	\$800.00
Phase XII	8	12	\$100.00	\$800.00	\$1,200.00
Phase XIII	8	10	\$100.00	\$800.00	\$1,000.00
Phase XIV	18	24	\$100.00	\$1,800.00	\$2,400.00
Phase XV	12	16	\$100.00	\$1,200.00	\$1,600.00
Phase XVI	20	32	\$100.00	\$2,000.00	\$3,200.00
Phase XVII	20	40	\$100.00	\$2,000.00	\$4,000.00
Phase XVIII	14	22	\$100.00	\$1,400.00	\$2,200.00
Phase XIX	4	6	\$100.00	\$400.00	\$600.00
Phase XX	4	6	\$100.00	\$400.00	\$600.00
Phase XXI	12	16	\$100.00	\$1,200.00	\$1,600.00
Phase XXII	14	18	\$100.00	\$1,400.00	\$1,800.00
Phase XXIII	26	34	\$100.00	\$2,600.00	\$3,400.00
Component Allowance (4)	0	0	\$100.00	\$0.00	\$4,000.00
<b>Estimated Total</b>	<b>267</b>	<b>391</b>		<b>\$26,700.00</b>	<b>\$43,100.00</b>

## 6.2 Additional Work

Work beyond the scope of the project will be billed according to the following Jabico rate schedule:

<b>Solution</b>	<b>Description</b>	<b>Rate/Hour</b>
High-end Programming	Database Programming, PHP, CGI, Scripting, Java, Flash	\$100.00
Low-end Programming	Basic HTML Coding	\$100.00
Strategy	Business Development for the Web, research, company analysis	\$100.00
Design	Design, Storyboarding, Graphic Manipulation	\$100.00
Project Management	Managing of projects, coordination	\$100.00
Copywriting	Copy editing for Web, copywriting	\$100.00
Technical Support	Onsite Technical Support	\$100.00
Phone Technical Support	Phone Support	\$100.00
SEO	Search Engine Optimization, Research, Marketing, Copy and related services	\$100.00

## 7.0 Terms and Conditions

- 7.1 Jabico** works on a time-and-materials basis for work *above and beyond* the scope of the original project when requested by the client.
- 7.2 Jabico** carries significant professional liability insurance and automotive liability coverage. The company meets all federal and state labor laws and carries worker's compensation insurance. Proof of insurance is available upon request.

### Proposal Approved:

Initial any hand-written comments and complete signature area below.

*Jabico does not guarantee or imply results from any marketing campaigns. A factor of risk is inherent in any marketing, public relations, or advertising direction. I, the client, fully understand and acknowledge this.*

### SCMTD

By: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

*Approval of the enclosed proposal does not institute a contract to begin work. A separate Memorandum of Engagement or Development Agreement will delineate the payment schedule according to options chosen by client.*

*The estimate enclosed is valid through April 30<sup>th</sup>, 2009.*

The following information is needed to complete the setup of your account within our project management system(s) and will also be used to initiate work on this project.

**BUSINESS INFORMATION**

Company name:

Phone:

Fax:

Sole proprietorship:

Partnership:

Corporation:

Other:

State in which business is registered:

**BILLING ADDRESS**

Address:

City:

State:

ZIP Code:

**SHIPPING ADDRESS (IF DIFFERENT THAN BILLING)**

Address:

City:

State:

ZIP Code:

**CONTACTS**

**Billing Contact Name:**

Title:

Address:

City:

State:

ZIP Code:

Phone:

Fax:

E-mail:

**Primary Project Contact Name:**

Title:

Address:

City:

State:

ZIP Code:

Phone:

Fax:

E-mail:

**Secondary Project Contact Name (if exists):**

Title:

Address:

City:

State:

ZIP Code:

Phone:

Fax:

E-mail:

**Technical Contact Name (if exists):**

Title:

Address:

City:

State:

Zip Code:

Phone:

Fax:

E-mail: