



# REGIONAL TRANSIT SYSTEMS PLAN

*STRATEGICALLY INVESTING IN PUBLIC TRANSPORTATION*

ADOPTED NOVEMBER 17, 2016

**San Joaquin Council of Governments**

With Acknowledgement to the following for their assistance in preparing the Systems Plan:

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# EXECUTIVE SUMMARY



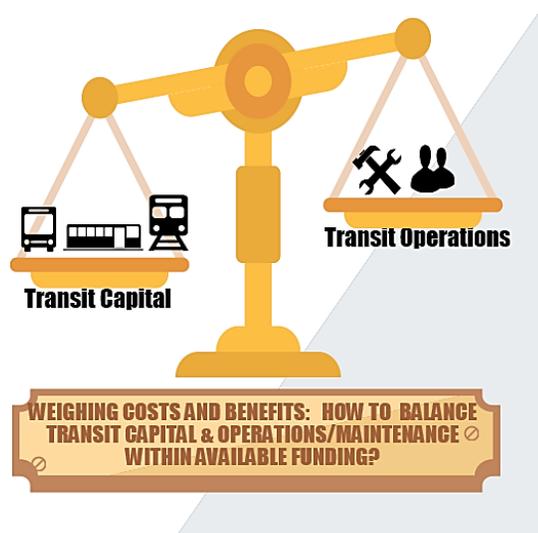


## Executive Summary

The San Joaquin Council of Governments (SJCOC), in its role as the Regional Transportation Planning Agency (RTPA) and the Metropolitan Planning Organization (MPO), is responsible for long range transit planning in the San Joaquin Region. The bus/rail transit operators in the county are as follows:

- » San Joaquin Regional Transit District,
- » San Joaquin Regional Rail Commission, and
- » The Cities of Escalon, Lodi, Manteca, Ripon, and Tracy.

In collaboration with these operators, SJCOC has prepared the Regional Transit Systems Plan (Systems Plan). The Systems Plan is a long-range transit plan that looks at bus and rail transit needs, their related costs, and details a financial forecast of anticipated funding through year 2024.



The report is organized as follows:

**Chapter A. Introduction:** This chapter provides an overview of the Plan, the regional geographic setting, and a description of the bus and rail transit agencies in San Joaquin County. This chapter also articulates the regional transit vision.

**Chapter B. The Regional Transit System Network:** This chapter showcases one of the unique features of the Systems Plan. It articulates the “point of view” from the individual transit operators in the San Joaquin region. The operators provided data on existing transit performance, projected transit costs, and their own financial analysis on how to fund the proposed transit system. (In regards to the San Joaquin Regional Transit District and the San Joaquin Regional Rail Commission, the transit system in the Systems Plan is “scaled back” in terms of expansion plans as compared to the SJCOC Regional Transportation Plan.) The data shows that many operators are unable to identify all revenue sources to finance the proposed systems, resulting in funding shortfalls.

*Even with transit systems that are not as robust as some operators would like to see, operators will need to examine a combination of the following actions in order to build the transit systems: (1) leverage discretionary funding to eliminate shortfalls, (2) reduce system expansion plans (and capital investments) envisioned by the*

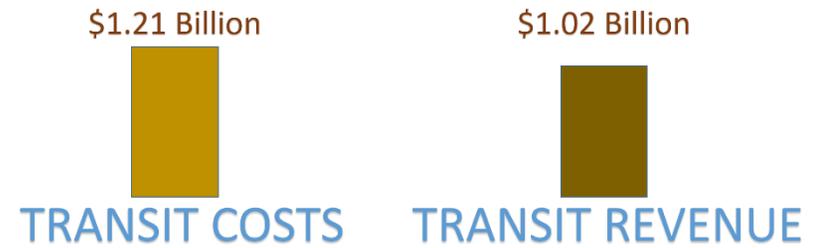


*operator, (3) find other innovations to deliver the service, and (4) find ways to cut operating costs.*

**A summary of the “operator provided data” is provided in the following pages at the end of this Executive Summary section.**

**Chapter C. The Regional Funding Future:** SJCOC provides a revenue projection to ascertain how much, from a regional perspective of state and federal funds anticipated to be available through 2024, will be available to finance the regional transit vision. The financial analysis relies on historical patterns of funding, assumptions about future conditions, and preliminary assumptions about how some discretionary revenues will be allocated.

*The Systems Plan assumes \$1.02 billion in projected revenues to support the \$1.21 billion in public transportation needs through the planning period*



The chapter also goes into some of the funding challenges as well as policy questions and issues that directly impact the transit funding future.





**Chapter D. Courses of Action:** The Systems Plan is more than just a math exercise and therefore does not simply calculate cost versus funds available. It includes a discussion of strategic transit investments and identifies policies for further development. This chapter describes the need to look at innovative strategies, emerging technologies, and to identify key stakeholders essential to working on solutions. It identifies six “areas of action” and specific strategies to jumpstart and guide informed decisions on the delivery of the regional transit vision in the coming months and years to come.



**Chapter E. Next Steps Following Public Comment on the Plan:** The full draft of the Systems Plan was circulated for 30-day public review and included public workshops and further discussions at the SJCOC Board. This chapter provides an overview of the public comment process, results, and outlines immediate next steps following plan adoption by the SJCOC Board.





**San Joaquin Regional Transit District** operates in Stockton, the largest city within San Joaquin County. In 2010, Stockton had a population of 298,118. Of the citywide population, 24.3% were low-income, 10.0% were elderly, and 29.9% were youths. As the largest transit provider in the county, San Joaquin Regional Transit District (RTD) also provides connections throughout the region, including Escalon and Ripon, through a number of services, and thus plays a critical role in San Joaquin County's transportation network.

In 2008, despite a projected operating budget of \$42 million, RTD's budget was reduced to \$30 million. In the last five years, RTD has redirected its service design to focus on expanding and promoting those services that provide the most benefit to the local community. As part of this effort, RTD recently reduced or eliminated underperforming routes and prioritized capital funds on continuing buildout of its Metro Express BRT service. Seven years later with only minor budget increases, RTD ridership has recovered to pre-2008 levels.

Over the next 10 years, RTD seeks to be more effective as a regional transit provider by finding cost effective ways to improve frequency and performance. The expenditure plan presented accounts for minimal planned changes. RTD deems these changes necessary for adapting to current transportation needs. The level of service carries forward a majority of the service and staffing reductions from 2008. The following changes are included as measures to maximize impact of transportation funding, while efficiently meeting transit needs:

- Expansion of Metro Hopper to replace traditional Dial-a-Ride service, still meeting ADA requirements at a reduced cost;
- MLK and Crosstown Miner BRT expansion, extending service to Stockton's most disadvantaged communities;
- Restructure of RTD commuter service, increasing service to BART and providing cost effective vanpool program; and
- Gradual fare rate increases.

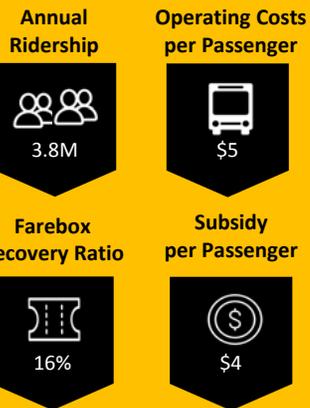
#### **Transit System Quick Facts:**

- Type: Local fixed route service, Metro Express Bus Rapid Transit (BRT) service, Metro Hopper, intercity County Hopper service, commuter service, general public dial-a-ride, and curb-to-curb ADA Stockton Metro Area Dial-a-Ride
- Service Area: City of Stockton, City of Ripon, City of Escalon, and San Joaquin County
- Routes: Weekdays – 15 local routes, 3 BRT routes, 8 limited weekday crosstown routes, 1 intercity route from Stockton to Lodi, 11 commuter routes, 9 Metro Hopper routes, and 4 County Hopper Routes. Weekends – 7 local routes.
- Fare: \$1.50 for local, intercity, and Hopper service. \$1 for ADA certified deviations on Hopper. \$3 for local dial-a-ride. \$7 one way for commuter bus service. Discounted fares for seniors and students.

## Recent Transit Performance by the Numbers

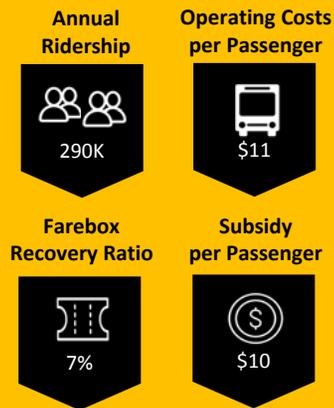
Between 2009 and 2014, RTD was challenged by economic conditions during the recession, affecting ridership, costs, and funding and resulting in fluctuating performance metrics. Farebox recovery ratio does not meet the 20% TDA funding requirement for local fixed route, BRT, or Intercity Hopper service.

### Fixed Route, BRT, and Local Performance



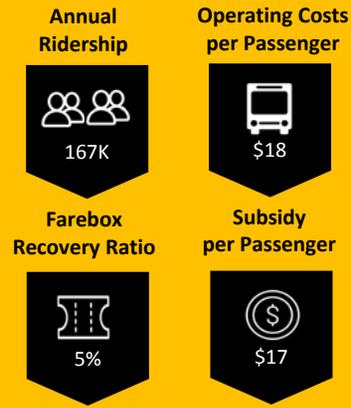
Fixed route ridership decreased after the recession and service cuts in 2009 and 2012, but in FY 13/14 grew past its pre-recession levels. Between 2009 and 2014, operating cost per passenger has stayed fairly steady around \$5. In the same period, farebox recovery ratio has steadily decreased from 18% to 16%. Subsidy per passenger has been steady around \$4.

### Intercity Hopper Performance



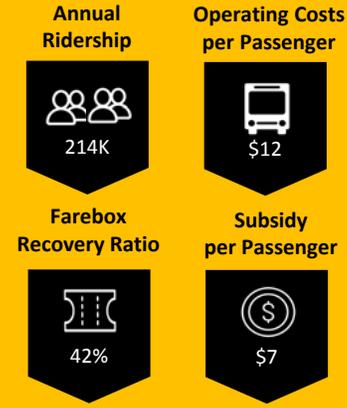
Between 2009 and 2014, there was a steady decrease in ridership. During the same time period, operating cost per passenger has fluctuated, but was most recently reported at \$11. Farebox recovery ratio increased in 2012, but returned to pre-recession levels in 2014 at 7%. Subsidy per passenger has fluctuated between \$9 and \$13 in the last 5 years, but was last reported around \$10.

### Metro Hopper Performance



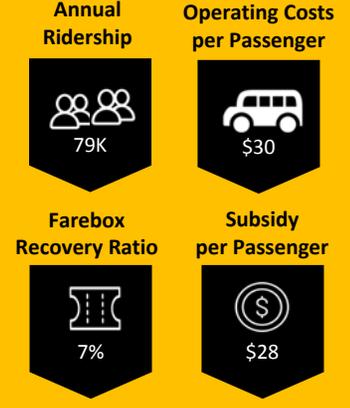
Between 2009 and 2014, ridership has seen a large increase from 57,185 to 167,186. During this period, operating cost per passenger has decreased slightly from \$12 to \$11. The farebox recovery ratio has grown from 3% to 5%, while subsidy per passenger has decreased from \$27 to \$17.

### Commuter Performance



Ridership decreased 27% between 2010 and 2014, despite a small reduction of service hours. Both operating cost and subsidy per passenger have fluctuated in the same period, but overall have trended downward. The commuter service showed the strongest farebox recovery ratios of all RTD services, with an upward trend in recent years.

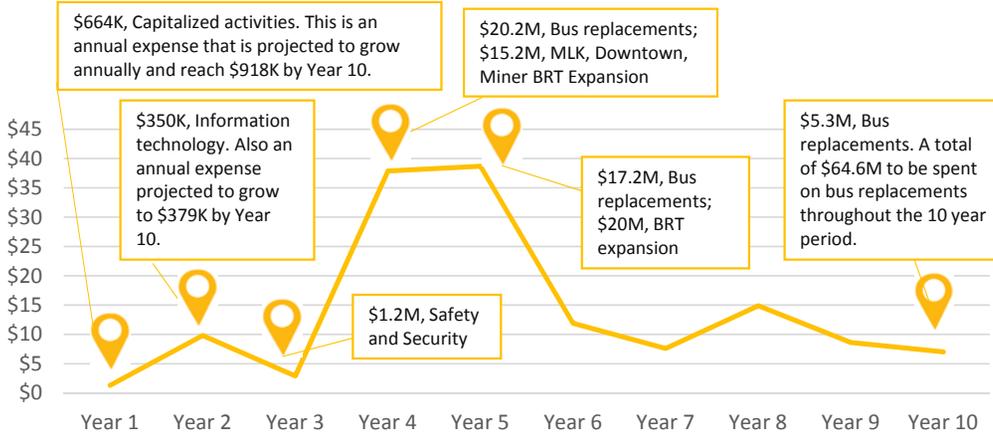
### Demand Response Performance



Between 2009 and 2014, ridership for this service has increased from 61,414 to 78,739. The farebox recovery ratio during the same period has fluctuated between 5-7%, but was last reported in 2014 at 7%. Both operating costs and subsidy per passenger have fluctuated and were reported at slightly lower levels in 2014 compared to 2009.

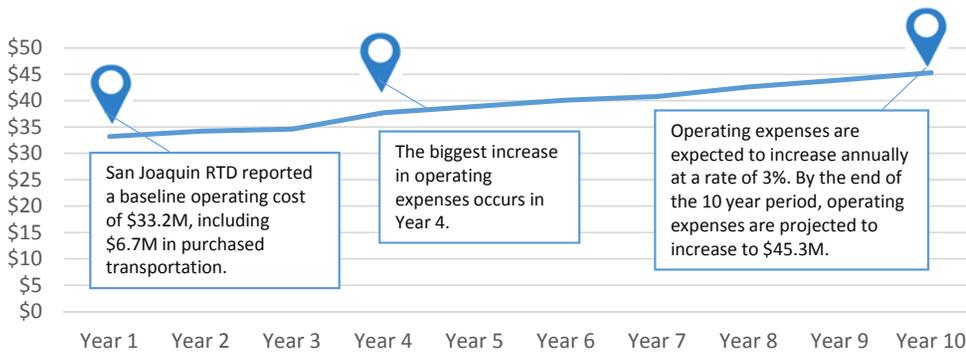
# 10-Year Funding Outlook

**Figure 1: San Joaquin RTD Capital Expenses, FY 14/15 – 23/24 (Millions)**



Source: RTD

**Figure 2: San Joaquin RTD Operating Expenses, FY14/15 – 23/24 (Millions)**



Source: RTD

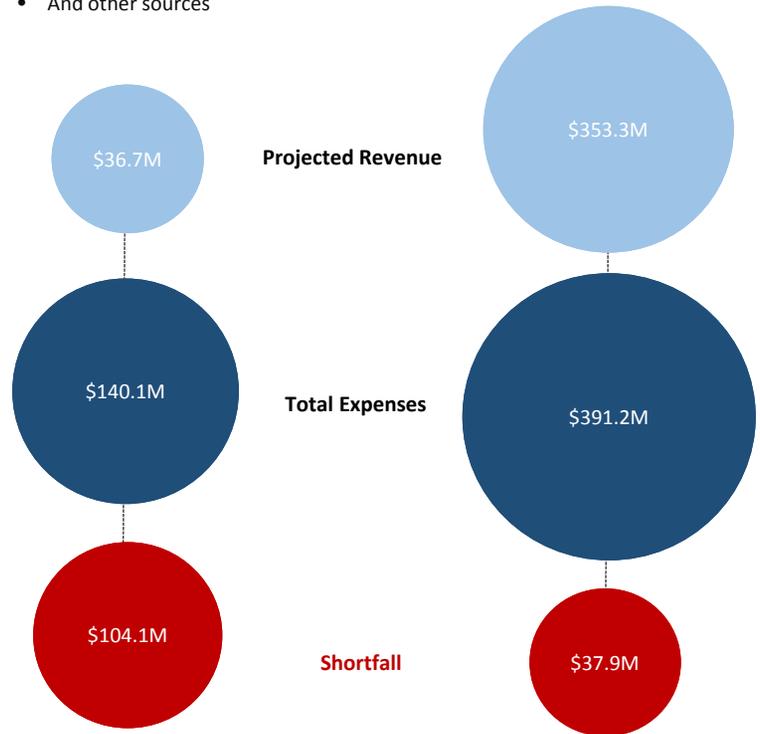
**Figure 3: San Joaquin RTD 10-Year Funding Assumptions**

**Transit Capital Projects Revenue**

- \$6.9M FTA 5307
- \$6.8M State Cap and Trade: TIRCP
- \$4.3M CMAQ – Standard Bus Replacement
- \$3.9M Prop 1B PTMISEA
- \$3.7M STA
- And other sources

**Transit Operations Revenue**

- \$152.8M TDA-LTF Revenues
- \$52.2M Passenger Fares
- \$50.2M Measure K
- \$45.5M Federal 5307 – Prev Maint
- \$30M TDA-STA Revenues
- And other sources



Source: RTD

Transit data provided by:

# Altamont Corridor Express



**The Altamont Corridor Express (ACE)** has been providing regional rail service between Stockton in San Joaquin County and San Jose in Santa Clara County since 1998. Service began with two daily round trips, with a third round trip added in 2001. A daily fourth round trip was temporarily added in 2006 during construction to widen I-205 through Tracy, and began regular service in 2012. The ongoing economic recovery in the Bay Area along with the addition of the fourth daily round trip has led to steady growth in ridership, particularly as new job centers emerge in the East Bay and Santa Clara County.

In recent years ACE has worked to improve travel times and on-time performance, as well as enhance passenger comfort through a number of technological upgrades. In the coming years, ACE service will expand to respond to increasing demand for travel to jobs in the Bay Area and to provide a link with high speed rail as it is implemented.

## Transit System Quick Facts:

- Type: Regional Commuter Rail
- Service Area: San Joaquin, Alameda, and Santa Clara Counties
- Service Area Population: 4 million
- Projected service area growth: 900,000 by 2025
- Route serves 10 stations
- Schedule: 8 round trips per week day
- Fare ranges from \$4-\$13.75

## Recent Transit Performance by the Numbers

Whether due to ACE's large ridership baseline or its measured approach to expansion, the agency's performance metrics show minor fluctuations between 2009 and 2014.

### Annual Ridership



1.1M

Ridership has steadily climbed in the last 5 years. Part of this growth is due to an added fourth daily round trip in 2012.

### Operating Costs per Passenger



\$17

Operating cost per passenger has fluctuated between \$15-18 in the last 5 years.

### Farebox Recovery Ratio



36%

ACE recovers 36 cents for every dollar spent on operating costs through its fare rates.

### Subsidy per Passenger

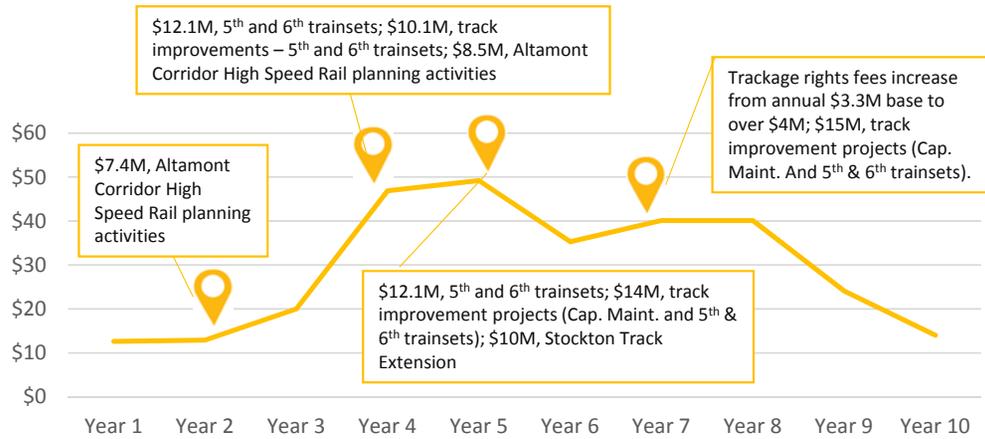


\$11

Except for a hike in FY 2012/13, the overall subsidy per passenger has decreased even with extended service.

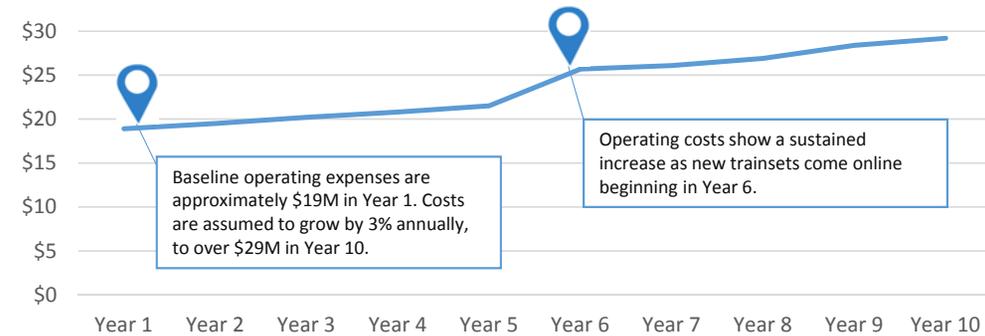
# 10-Year Funding Outlook

**Figure 1: Transit Capital Expenses, FY14/15 – FY 23/24 (Millions)**



Source: ACE

**Figure 2: Transit Operating Expenses, FY14/15 – FY 23/24 (Millions)**



Source: ACE

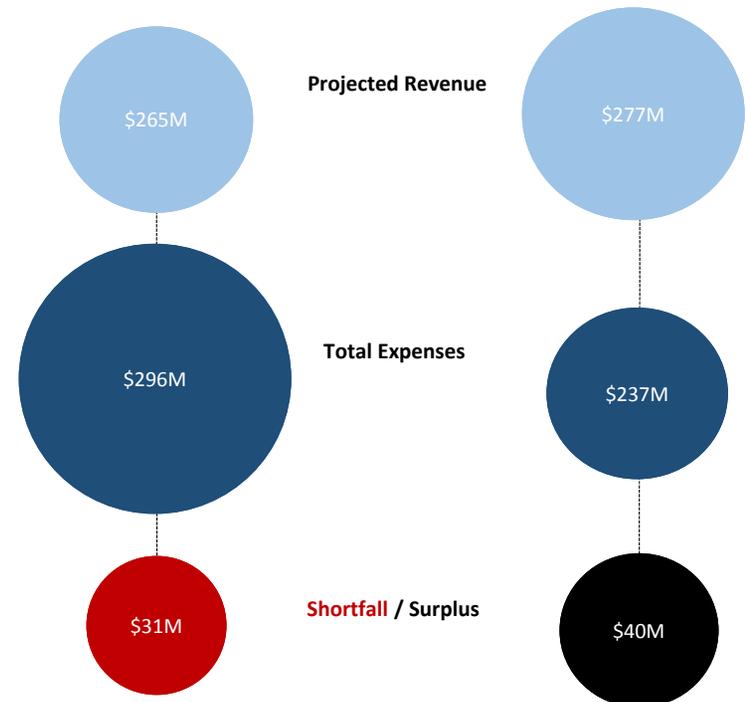
**Figure 3: ACE 10-Year Funding Assumptions**

**Transit Capital Projects Revenue**

- \$95M from TIRCP/Stat3
- \$45M from Prop 1A
- \$40M from FTA 5337 - SJCOG
- \$23M from FTA 5307
- \$20M from ACTC Baseline
- And other sources

**Transit Operations Revenue**

- \$112M from fare revenue
- \$64M from Measure K
- \$35M from SCVTA Baseline
- \$32M from ACTC Baseline
- \$26M from LTF
- And other sources



Source: ACE

Transit data provided by:

# City of Escalon



**Escalon is among the smallest of cities** within San Joaquin County, with a population of 7,254. Currently, Escalon’s population is comprised of 12.5% elderly, 13.2% low-income, 27.1% youth, and 3.0% individuals who do not own a private vehicle. Because transportation plays an integral role in the day-to-day quality of life, Escalon aims to provide for the transportation needs of its residents, especially those most dependent on transit service.

Escalon has provided transit service for many years, however the bus system was dubbed “eTrans” in 2008. Over the next five years, eTrans plans to continue its bus replacement program, add front mounted bike racks, and make other miscellaneous repairs and replacements of small items.

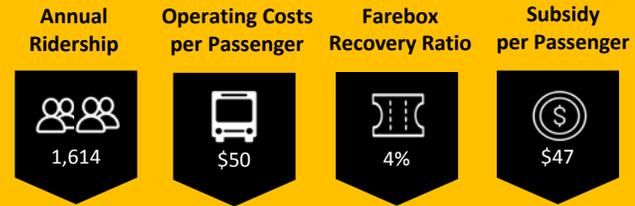
### Transit System Quick Facts:

- Type: Door-to-door dial-a-ride service, Flexible fixed route local/intercity transit service
- Service Area: City of Escalon, Riverbank, Modesto
- Routes: 1 intercity/flexible fixed route
- Schedule: Weekdays between 8am and 5pm, no service on weekends or holidays
- Fare: \$1.50 local, \$3 intercity; \$1 surcharge for route deviations up to ¾ mile

## Recent Transit Performance by the Numbers

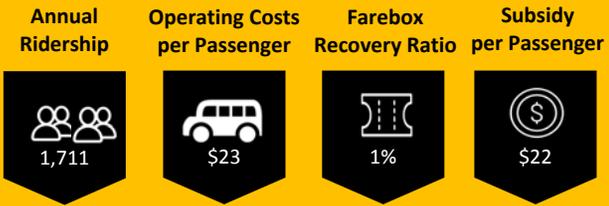
Between 2009 and 2014, performance metrics showed wide fluctuations for both service types. Overall, eTrans total ridership (flexible fixed route and dial-a-ride) has gradually decreased in recent years. Because eTrans is a small transit provider, however it is not held to the 20% farebox recovery ratio required of larger transit operators in urban areas.

### Flexible Fixed Route Performance



Between 2009 and 2014, ridership gradually increased, likely due to economic recovery and increases in service hours. During the same time period, operating cost per passenger increased from \$19 to almost \$50, the farebox recovery ratio decreased from 14% to 4%, and the subsidy per passenger increased from \$16 to \$47.

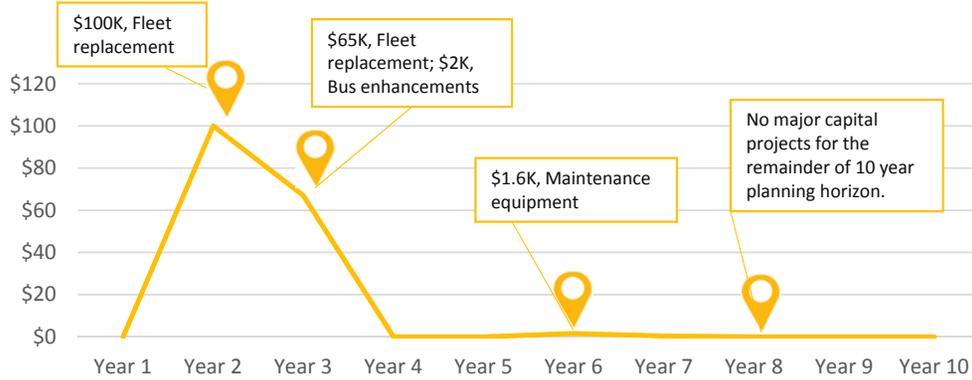
### Dial-A-Ride Performance



Ridership has declined from 3,021 in 2009 to 1,711 in 2014. Operating cost per passenger has fluctuated widely, but overall increased from \$16 to \$23 in the same period. The farebox recovery ratio and subsidy per passenger metrics have also fluctuated widely, but were reported at 1% and \$22 respectively in 2014.

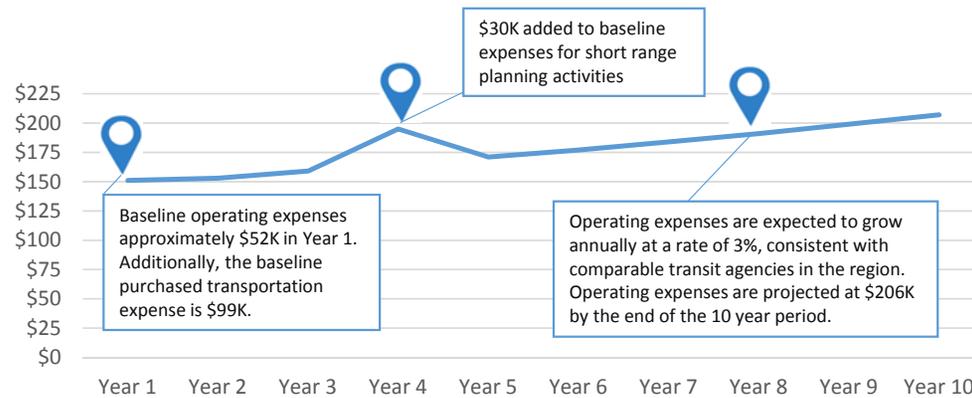
# 10-Year Funding Outlook

**Figure 1: eTrans Capital Expenses**



Source: City of Escalon

**Figure 2: eTrans Operating Expenses**



Source: City of Escalon

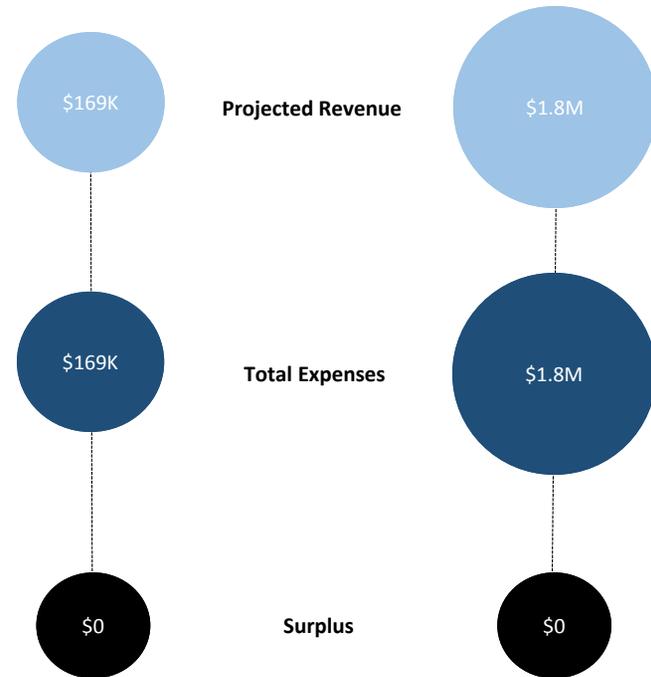
**Figure 3: eTrans 10-Year Funding Assumptions**

**Transit Capital Projects Revenue**

- \$165K Prop 1B – PTMISEA or TSSSDRA
- \$2K Measure K
- \$1.6K FTA 5311
- \$400 Unspecified

**Transit Operations Revenue**

- \$755K TDA – LTF
- \$550K Federal 5311
- \$336K Measure K
- \$57K Fare revenue
- And other sources



Source: City of Escalon

Transit data provided by:

# City of Lodi



**Established in 1906**, the City of Lodi hosts a population just over 62,000, representing a 9.1% growth over the last ten years, with more growth expected in coming years. Currently, Lodi’s population is comprised of 14.7% elderly, 15.7% low-income, 16.7% youth, and 6.5% individuals who do not own a private vehicle. Because transportation plays an integral role in the day-to-day quality of life, Lodi envisions providing its residents and employees with mobility options, especially for those more likely to be dependent on transit service.

Over the next ten years, the City of Lodi intends to continue improving its existing, core service through ongoing maintenance activities, station upgrades, the addition of a new transfer facility, and fleet replacement.

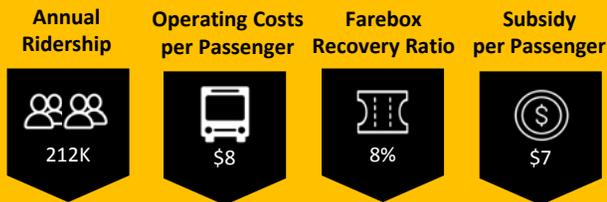
## Transit System Quick Facts:

- Type: Fixed-route and demand-responsive local transit
- Service Area: City of Lodi
- Service Area Population: 62,000
- Fixed Routes: 5 weekday, 3 weekday express routes, 4 weekend routes
- Schedule: 7 days a week, with limited weekend operation
- Fixed-route fare: \$0.60 - \$1.25
- Demand-responsive service fare: ADA \$2, General \$7

## Recent Transit Performance by the Numbers

Between 2009 and 2014, the agency’s performance metrics showed minor fluctuations. Because City of Lodi is a small transit provider, it is not held to the 20% farebox recovery ratio required of larger transit operators in urbanized areas. Performance metrics for both fixed-route and demand-responsive transit services are summarized below.

### Fixed Route Performance



Ridership has fluctuated between 2009 and 2014, but overall has increased 12% to over 212,000 passengers. Operating cost per passenger has held steady around \$8, while the farebox recovery ratio has stayed around 8%. The subsidy per passenger has fluctuated in the last 5 years, but has stayed around \$7 per passenger.

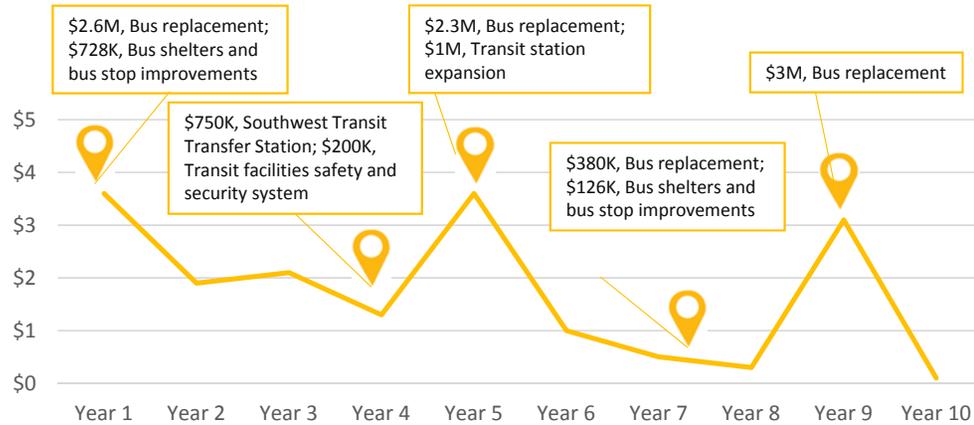
### Demand-Responsive Performance



Overall ridership has declined in the last 5 years by 16%. Operating cost per passenger has also declined from approximately \$37 in 2009, to \$31 in 2014. The farebox recovery ratio has fluctuated, but slightly increased to 6% in 2014. The subsidy per passenger has steadily declined to \$29, from \$35 in 2009.

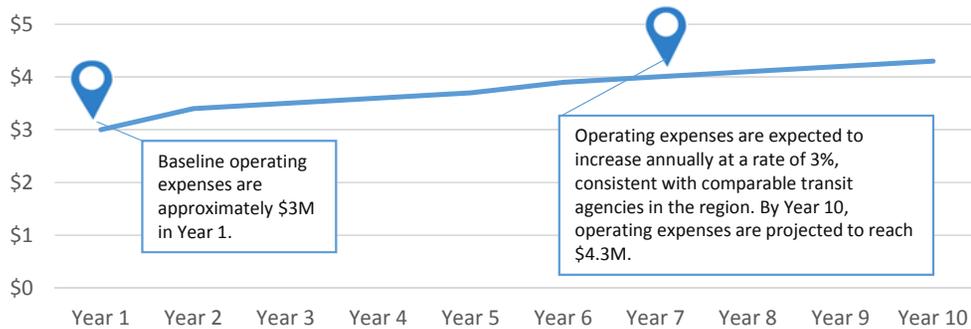
# 10-Year Funding Outlook

**Figure 1: City of Lodi Capital Expenses (Millions)**



Source: City of Lodi

**Figure 2: City of Lodi Operating Expenses (Millions)**



Source: City of Lodi

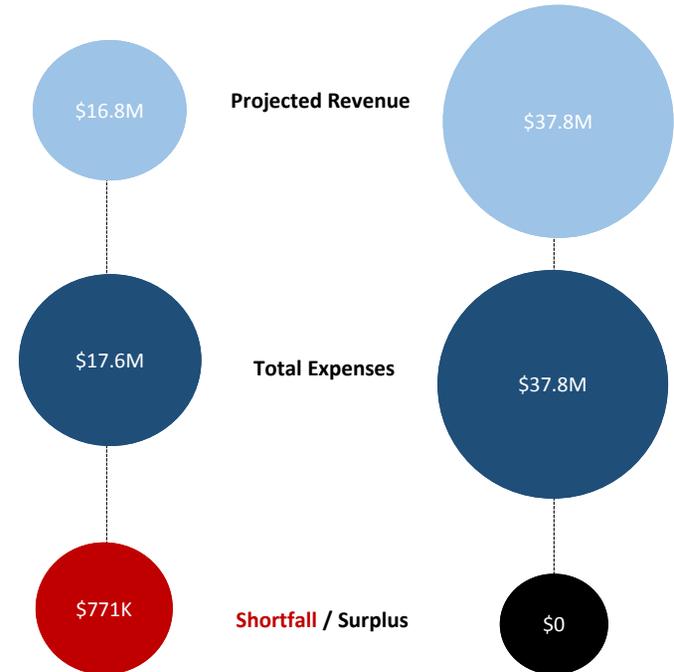
**Figure 3: City of Lodi 10-Year Funding Assumptions**

**Transit Capital Projects Revenue**

- \$5.4M CMAQ
- \$4.7M Transfer from operations
- \$4.2M Unspecified
- \$2.4M FTA 5307

**Transit Operations Revenue**

- \$21M TDA-LTF revenue
- \$14.3M Federal funding
- \$2.8M Measure K
- \$2.3M Fare revenue
- Other sources



Source: City of Lodi

Transit data provided by:

# City of Manteca



**Manteca experienced a 36% population increase** since 2000 and current figures indicate Manteca is home to more than 67,000 residents. Manteca's population is comprised of 10% elderly, 11% low-income, 25% youth, and 2% individuals who do not own a private vehicle.

Launched in November 2006 with two routes, the City of Manteca has a young and growing bus system. Over the next ten years, the City of Manteca expects to experience steady population growth, as well as the completion of two major development projects.

With anticipated growth, City of Manteca plans to improve the bus stops, promote a bus transfer policy, develop a travel training program, improve the availability of transit passes, and invest in operation improvements to enhance interconnectivity and performance.

## Transit System Quick Facts:

- Type: Curb-to-curb Dial-a-Ride service, Fixed route local transit service
- Service Area: City of Manteca
- Routes: 3 local fixed routes
- Schedule: Weekdays between 6am and 7pm, no fixed route service on weekends or holidays; Dial-a-Ride service available to general public on Saturdays 9am – 4pm
- Fare: \$1 general, reduced fare for youth, seniors and passengers with disabilities

## Recent Transit Performance by the Numbers

Between 2009 and 2014, performance metrics showed steady growth with fixed route ridership. On the other hand Dial-a-Ride performance was more static during this period. Because the City of Manteca is a small transit provider, it is not held to the 20% farebox recovery ratio required of larger transit operators in urban areas.

### Fixed Route Performance

Annual Ridership	Operating Costs per Passenger	Farebox Recovery Ratio	Subsidy per Passenger
 59K	 \$10	 7%	 \$9

Between 2009 and 2014, fixed route ridership more than doubled from 27,000 to over 59,000 passengers. During the same time period, operating cost per passenger decreased from \$15 to almost \$10, the farebox recovery ratio fluctuated between 5% to 7%, and the subsidy per passenger decreased from \$14 to \$9.

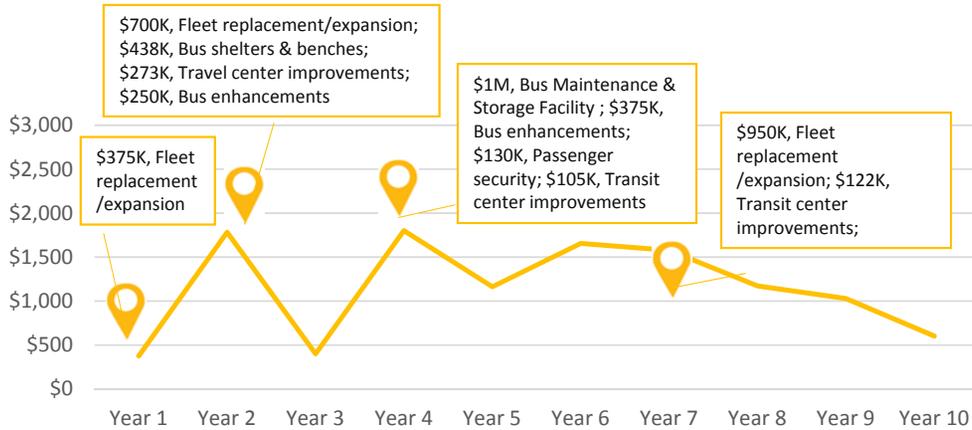
### Dial-A-Ride Performance

Annual Ridership	Operating Costs per Passenger	Farebox Recovery Ratio	Subsidy per Passenger
 16K	 \$24	 8%	 \$22

Ridership dipped in 2011, but returned to its previous peak at nearly 16,000 passenger trips in 2014. Operating cost per passenger has fluctuated, but overall increased from \$21 to \$24 in the same period. The farebox recovery ratio and subsidy per passenger metrics have also fluctuated, but were reported at 8% and \$22 respectively in 2014.

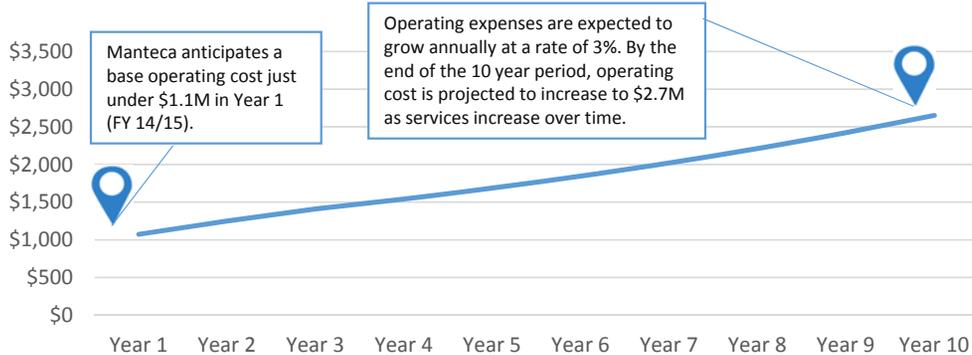
# 10-Year Funding Outlook

**Figure 1: City of Manteca Capital Expenses (Thousands)**



Source: City of Manteca

**Figure 2: City of Manteca Operating Expenses (Thousands)**



Source: City of Manteca

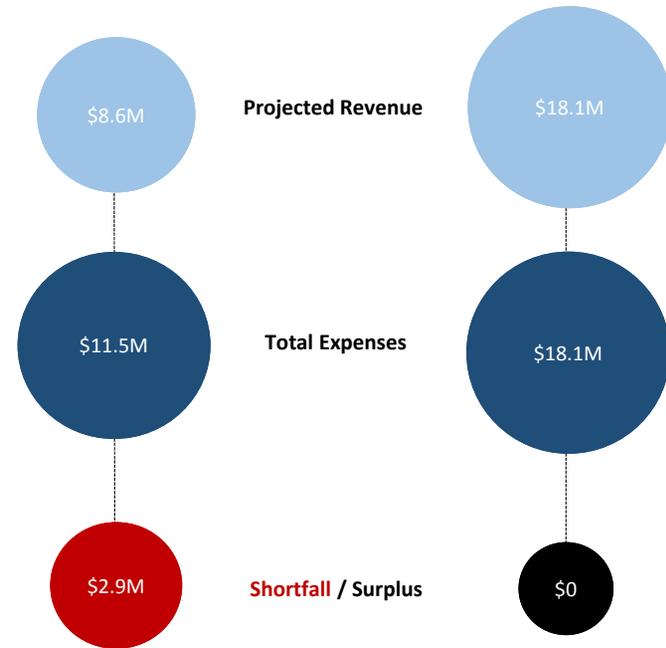
**Figure 3: City of Manteca 10-Year Funding Assumptions**

**Transit Capital Projects Revenue\***

- \$7.3M FTA 5307
- \$713K Prop 1B – PTMISEA, TSSDRA
- \$215K TDA – LTF
- \$193K FTA 5339
- \$152K TDA – STA

**Transit Operations Revenue**

- \$8.4M Federal funding
- \$8.2M TDA – LTF revenue
- \$641K Fare revenue
- \$474K Rental / advertising
- \$351K TDA – STA revenue



\*Due to the unpredictability of Section 5307 funding, Manteca Transit is utilizing its FY 15/16 figure as the baseline apportionment through FY 23/24. For other sources of funding, annual revenue estimates not provided beyond FY 15/16. Source: City of Manteca

Transit data provided by:

# City of Ripon



**The City of Ripon** has a population of approximately 14,297 people. Currently, Ripon's population is comprised of 11.8% elderly, 9.7% low-income, 28.8% youth, and 1.4% individuals who do not own a private vehicle.

In 2012, the City of Ripon purchased its first Compressed Natural Gas (CNG) bus and began operating a deviated fixed route bus service, known as the Blossom Express. Transit service is provided to local and regional destinations in neighboring Stanislaus County. The City of Ripon also operates a nine-passenger van to meet the needs of the elderly and disabled, but is also open to the general public.

Over the next ten years, the City of Ripon intends to slowly expand their transit system, improve bus shelters and bus facilities, construct a bus maintenance facility, construct a downtown multi-modal station, and continue its base operations. A number of these capital projects, however remain unfunded.

### Transit System Quick Facts:

- Type: Deviated fixed route transit service; Van service
- Service Area: City of Ripon, Modesto
- Routes: 1 route traveling from Ripon to Modesto, and back
- Schedule: Two morning loops, two afternoon loops every Tuesday and Thursday
- Fare: \$1-2 for deviated-route transit; \$1-1.50 elderly and disabled riders or \$15 general for van service

## Recent Transit Performance by the Numbers

Since it first began operating in 2012, Ripon's Blossom Express has experienced fluctuations in performance. These fluctuations were impacted by changes to services, ridership, costs, as well as methods of collecting data. Therefore, it may take some additional time for transit performance to stabilize.

### Deviated Fixed Route Performance



Between 2012 and 2014, ridership experienced a sharp decrease. During the same time period, operating cost per passenger decreased from \$11 to \$9, the farebox recovery ratio increased from 7% to 19%, and the subsidy per passenger decreased from \$10 to \$7.

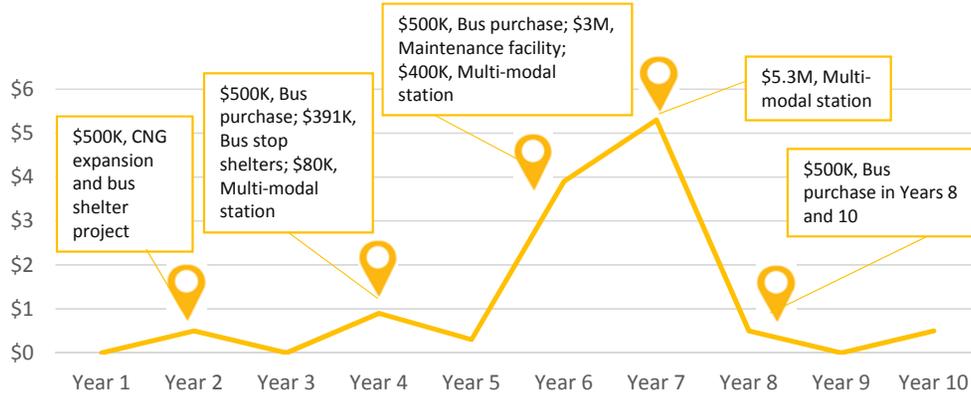
### Van Service Performance



Other than annual ridership, performance metrics for Ripon's van service were not reported.

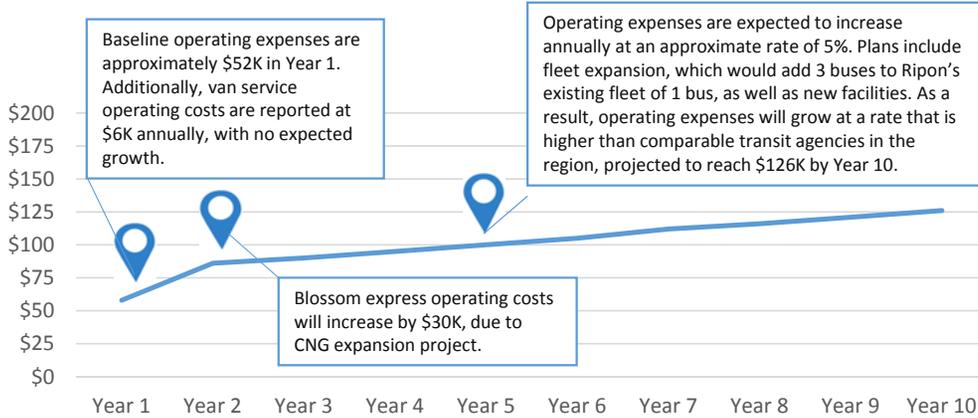
# 10-Year Funding Outlook

**Figure 1: Ripon Blossom Express Capital Expenses (Millions)**



Source: City of Ripon

**Figure 2: Ripon Blossom Express Operating Expenses (Thousands)**



Source: City of Ripon

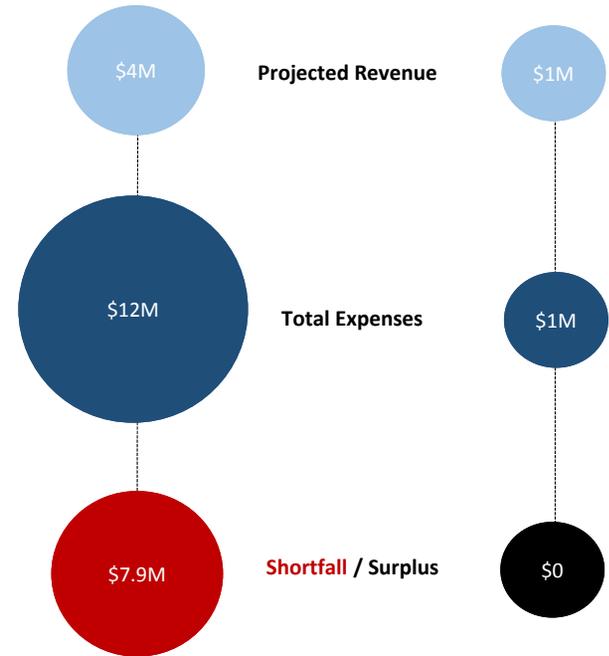
**Figure 3: Ripon Blossom Express 10-Year Funding Assumptions**

**Transit Capital Projects Revenue**

- \$2.4M FTA 5307 (Manteca UZA)
- \$500K FTA 5307 (Modesto UZA)
- \$451K Prop 1B (PTMISEA)
- \$391K FTA 5307 (Modesto UZA)
- \$310K CalOES (TSSSDRA)

**Transit Operations Revenue**

- \$876K Measure K Sales Tax
- \$74K Fare Revenue – Blossom Express
- \$50K TDA – STA Revenue
- \$10K Fare Revenue – DAR Passenger Van



Source: City of Ripon

Transit data provided by:

# City of Tracy



**Located in southwestern San Joaquin County**, the City of Tracy had a population of approximately 82,923 people in 2010. Of this population, 6.9% were elderly, 8.2% were low-income, and 32.2% were youth. These segments of the population tend to be most dependent on transit service.

The City of Tracy offers local transit services, which are operated by Tracy TRACER. Regional connections are available through RTD and the Altamont Corridor Express.

Over the next 10 years, Tracy intends to continue its bus replacement program, add wi-fi on buses, improve bus stop facilities, continue its base operations, and finish a short range transit plan.

### Transit System Quick Facts:

- Type: Fixed route transit service, door-to-door paratransit service, subsidized taxi ADA service
- Service Area: City of Tracy
- Routes: 4 local fixed routes, 2 commuter routes
- Schedule: Local M-F/7a-8p, Sat/9a-5p; Commuter M-F/6:30a-5:10p; Paratransit M-F/7a-7p, Sat/9a-5p
- Fare: Fixed route, \$1.25 and reduced fare for students and seniors; Paratransit \$1.50; Discount rates for subsidized taxi

## Recent Transit Performance by the Numbers

Between 2009 and 2014, Tracy TRACER was challenged by economic conditions during the recession, affecting ridership, costs, and funding and resulting in inconsistent performance metrics. Because Tracy TRACER is a small transit provider, it is not held to the 20% farebox recovery ratio required of larger transit operators in urban areas.

### Fixed Route Performance

Annual Ridership	Operating Costs per Passenger	Farebox Recovery Ratio	Subsidy per Passenger
124K	\$9	7%	\$8

Between 2009 and 2014, fixed route ridership has been trending upward. During the same time period, operating cost per passenger, farebox recovery ratio, and subsidy per passenger has fluctuated widely. In 2014, however, Tracy TRACER reported \$9 operating cost per passenger, 7% farebox recovery ratio, and \$8 subsidy per passenger.

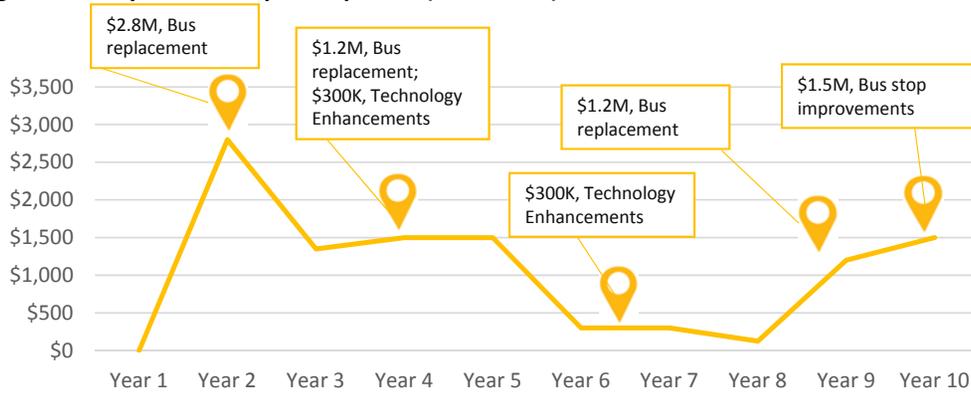
### Dial-A-Ride Performance

Annual Ridership	Operating Costs per Passenger	Farebox Recovery Ratio	Subsidy per Passenger
15K	\$49	4%	\$47

Between 2009 and 2013, paratransit ridership has been trending downward. Operating cost per passenger has grown from \$9 to \$49 in the same time period. Additionally, the farebox recovery ratio decreased from 17% to 4%, while subsidy per passenger increased from \$8 to \$47.

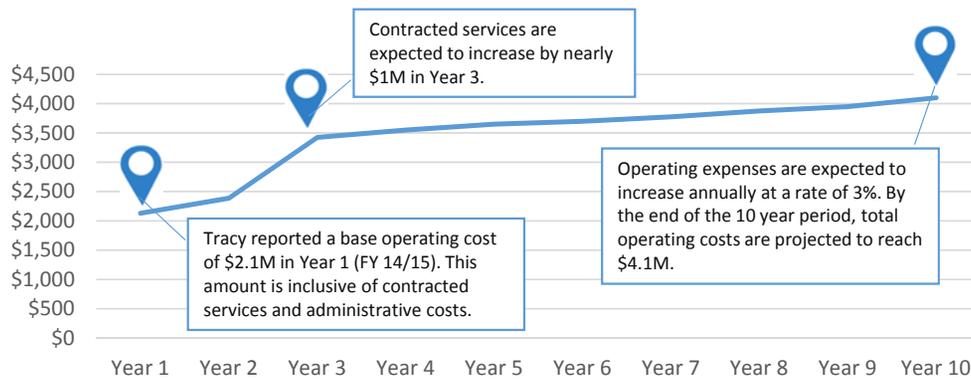
# 10-Year Funding Outlook

**Figure 1: Tracy TRACER Capital Expenses (Thousands)**



Source: City of Tracy

**Figure 2: Tracy TRACER Operating Expenses (Thousands)**



Source: City of Tracy

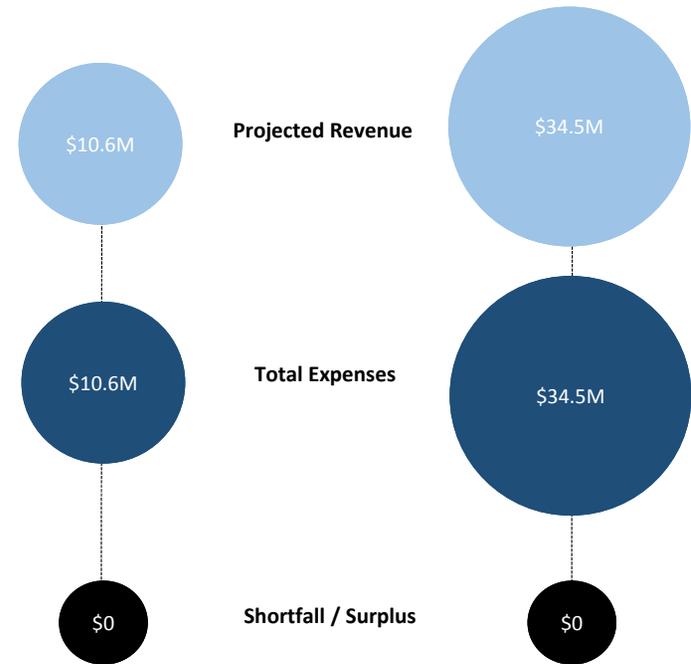
**Figure 3: Tracy TRACER 10-Year Funding Assumptions**

**Transit Capital Projects Revenue**

- \$2.1M TDA-LTF
- \$8.5M FTA 5307

**Transit Operations Revenue**

- \$19.5M TDA-LTF
- \$12.4M FTA 5307
- \$1.5M Passenger Fares
- \$720K TDA-STA
- \$450K Rental Income



Source: City of Tracy

# INTRODUCTION





## 1 About the Plan

Public transportation is important to the efficiency and effectiveness of the San Joaquin region's transportation system. It is a crucial factor in opportunity and economic prosperity which are contributors to overall quality of life.

*The San Joaquin region provides public transportation, via bus or rail transit, that serves both local and regional transit needs. Through short trips within the County or longer trips to neighboring counties, it connects residents to jobs, schooling, shopping, medical visits, and other key destinations.*

Public transportation is one of the transportation investments that make up the region's multimodal transportation system identified in the San Joaquin Council of Governments' Regional Transportation Plan/Sustainable Communities Strategy. This multimodal transportation system is challenged with so many transportation needs and not enough money to invest in all those needs. For this reason, the Regional Transit Systems Plan (referred simply as the "Systems Plan"), describes a future of public transit needs and costs through 2024. It identifies considerations, issues, policy development, and implementation areas that would need to be examined further, thereby guiding an informed decision making process on transit investments.

Leading up to this study, the San Joaquin Council of Governments received input from all the transit operators in San Joaquin County to identify transit needs in the region. These operators are:

- » *San Joaquin Regional Transit District,*
- » *San Joaquin Regional Rail Commission, and*
- » *The Cities of Escalon, Lodi, Manteca, Ripon, and Tracy.*

The Plan uses current transit and cost data that are reported directly from these various transit operators to create and to present this assessment of public transit needs and financial constraints.

Expanding and maintaining public transit in San Joaquin is challenging due to its differing urban and rural centers, varying land use density within those centers, and differing transit dependency within communities. The Plan recognizes fully that a discussion of strategic transit investments and related policy development cannot be viewed simply through the lens of "how much money do we have to pay for the transit system." The Systems Plan therefore delves into the need to examine innovative strategies, implications of emerging technologies, and the identification of key stakeholders essential to the collaborative decision making process. Moving beyond the basic question of "how much money do we have?", the Systems Plan provides an action plan to help better frame investment decisions that address increasing transit demand, access issues, and the need to move San Joaquin's growing population efficiently and safely.



## About San Joaquin Council of Governments

The San Joaquin Council of Governments (SJCOC) is a joint-powers authority comprised of the County of San Joaquin and the cities of Stockton, Lodi, Manteca, Tracy, Ripon, Escalon, and Lathrop. SJCOC serves as the regional transportation planning agency, which provides a forum for regional decision-making on issues such as growth, transportation, environmental management, housing, open space, air quality, fiscal management, and economic development. SJCOC also takes a look at population statistics, airport land use, habitat and open space planning, and other regional issues.

*The mission of SJCOC is to partner with local governments, the private sector, and community groups as the forum, facilitator, and administrator of regional programs, and to advocate for regional and inter-regional issues in the development of a comprehensive strategy to achieve resolutions.*

Because one of SJCOC's duties is long range transportation planning, SJCOC has undertaken the role to develop the Regional Transit Systems Plan. In addition, SJCOC also has multiple responsibilities in its federally designated role as the Metropolitan Planning Organization (MPO). Part of the MPO duties include the programming and allocation of state and federal funds. Within this Systems Plan, SJCOC prepared a forecast of transit revenues through 2024.

Figure A1: San Joaquin County Map



Source: SJCOC

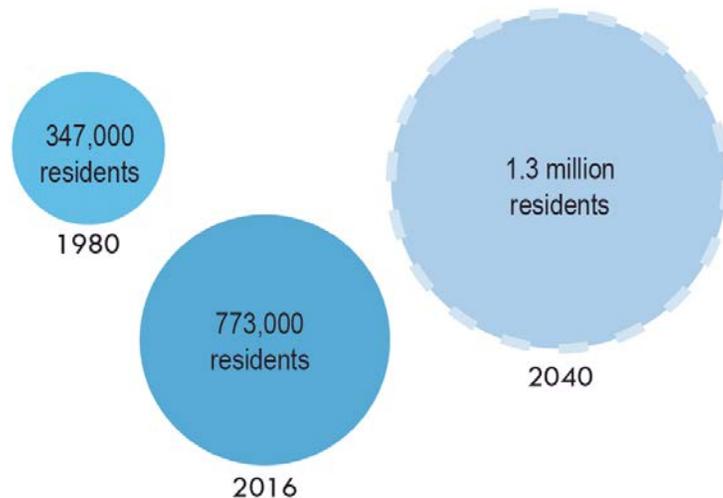




## Population

San Joaquin County has grown dramatically since the 1980s. In fact, the US Census population for San Joaquin County in 1980 was 347,000 residents and 673,000 in 2010, a ninety-four percent increase over a 30 year period. If this historical growth rate is applied for the next 30 years, in 2040 San Joaquin County will house over 1.3 million residents.

Figure A3: San Joaquin County Population Growth, 1980 - 2040



Source: U.S. Census Bureau

The growth of San Joaquin County may be attributed to the Northern California megaregion as a whole, defined by job centers in the San Francisco Bay Area and the Sacramento metropolitan area. According to the planning advocacy organization San Francisco Bay Area Planning and Urban Research Association (SPUR), the Northern

California Megaregion (San Joaquin-Sacramento-Bay Area) will grow 65 percent by 2050 to a population greater than 20 million residents.

The Northern California megaregion experienced a combined statistical growth of nearly 4 percent over the past five years, with 11 million residents in urban core areas out of 14 million. In 2015, Alameda and Contra Costa Counties both saw population growths of 1.3 percent and Sacramento County experienced a 1 percent increase.

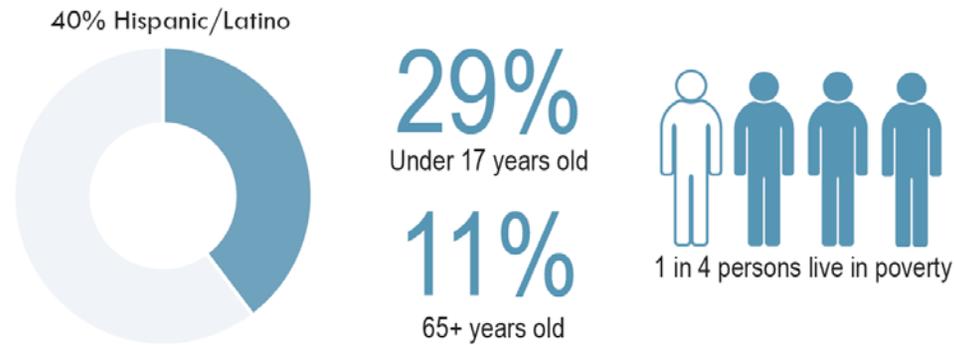
*According to most recent estimates, the San Joaquin County population has reached more than 700,000. Since 2000, San Joaquin County has added fifty thousand residents, experiencing a 26% percent growth. The population will continue to increase at an approximate rate of 1.5 percent annually, making San Joaquin County one of the fastest growing counties in California.*

In addition to the unincorporated areas, San Joaquin County contains seven (7) incorporated cities with population estimates as follows according to most recent data from the U.S. Census:

- » Escalon: 7,254 residents
- » Lathrop: 18,023 residents
- » Lodi: 62,134 residents
- » Manteca: 67,096 residents
- » Ripon: 14,297 residents
- » Stockton: 297,223 residents
- » Tracy: 82,922 residents



Figure A4: San Joaquin County Demographics



Source: U.S. Census Bureau

### Demographics

Out of 700,000 San Joaquin County residents, approximately 40 percent identify as Hispanic or Latino. Approximately 35 percent identify as White, 0.4 percent American Indian and Alaska Native, 7 percent African American, 14 percent Asian American, 0.5 percent Native Hawaiian and Other Pacific Islander, and 3.4 percent identified with two or more races.

Approximately, 29 percent of San Joaquin County residents are under 17 years old, while 11 percent are over the age of 65. Additionally, 18 percent of San Joaquin County residents live in poverty. The US Census defines poverty as a four-person household making less than \$25,000/year. Finally, 10 percent of San Joaquin County residents are living with a disability. From another perspective, *1 out of 10 persons have a disability, 4 out of 10 may be too young or old to drive, and 1 in 4 persons may not be able to afford a personal vehicle.*

### Jobs

In 2014, San Joaquin County had approximately 207,000 jobs and of those jobs the following sectors have reached a critical percentage higher than that of the national average:

- » *Transportation & Warehousing (6.31 percent),*
- » *Agriculture & Natural Resources (6.11 percent),*
- » *Retail Trade (8.03 percent), and*
- » *Wholesale Trade (7.96 percent).*

Other large industries in San Joaquin County include Financial Activities and Government-related positions. From 2014 to 2015, the San Joaquin County region saw an overall 6.2 percent rise in county job growth.



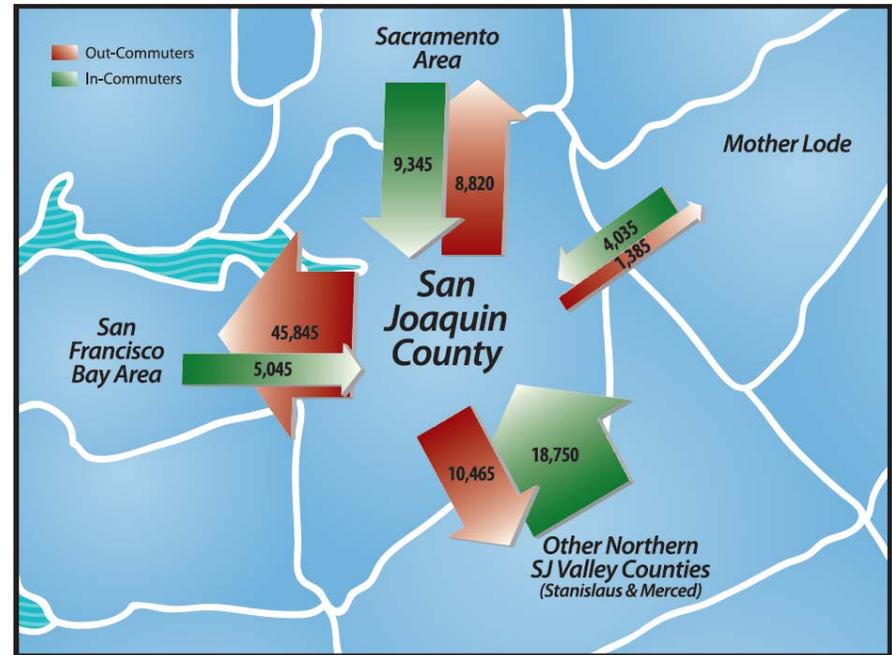
### Housing Costs and Relationship with Commute Patterns

The conveniently located geography of San Joaquin County also opens opportunities for the commuter. Since 1980, more than 40,000 San Joaquin residents have become daily commuters to the San Francisco Bay Area and over 8,000 residents commute to the Sacramento Area. Additionally, 26 percent of employed residents worked outside of San Joaquin County in 2010, compared to 7% in 1980. At least 17 percent of jobs in San Joaquin County were held by residents of other counties in 2010, up from 8% in 1980. Finally, 16 percent of employed residents in San Joaquin County travel more than an hour to work.

Due to high-cost housing in the San Francisco Bay Area and the availability of lower-cost housing in San Joaquin County, the county is a place where many interregional commuters reside. Interregional commuters travel long distances for employment outside the county, either northward to Sacramento or westward to the San Francisco Bay Area. Of the 233,200 residents representing the employed workforce, approximately 114,610 commute outside of the region to their employment sites.

As a result of dramatic population growth and the rise of housing costs, private land owners and local governments in San Joaquin County have converted prime agricultural land uses to support new housing tracts in order to accommodate the rise of interregional commuters. The future housing market will continue to grow at a stable rate to accommodate future growth. Currently, the region supports an estimated 219,500 households. Forecasts suggest that by 2040 the housing market will need to grow to accommodate over 100,000 additional households. As San Joaquin County transforms, these growth factors have profound effects on the ability to finance, deliver, and maintain the transportation infrastructure.

Figure A5: San Joaquin County Daily Commuter



Source: SJCOG Center for Demographic Studies and UOP Center for Business and Policy



### 3 Transit Agencies in San Joaquin County

Seven (7) transit agencies operate in San Joaquin County:

- » *Altamont Corridor Express (ACE);*
- » *City of Escalon eTrans;*
- » *City of Lodi GrapeLine;*
- » *City of Manteca Transit;*
- » *City of Ripon Blossom Express;*
- » *San Joaquin Regional Transit District (RTD); and*
- » *City of Tracy TRACER.*

#### Altamont Corridor Express

The Altamont Corridor Express (ACE) provides commuter rail service in San Joaquin, Alameda, and Santa Clara counties, covering a service area population of about 4 million residents. By 2025, the service area population may grow by as much as 900,000.

The 86-mile ACE route has 10 stations. Trains stop at three stations serving San Joaquin County: Stockton, Lathrop/Manteca, and Tracy, then continue to Alameda County and terminate in Santa Clara County. ACE provides eight (8) scheduled trips per day with four (4) morning trips departing Stockton between 4am and 7am and four (4) evening trips departing San Jose from 4pm to 7pm. Fares range from \$4.00 each-way for trips within the Tri-Valley Area and up to \$13.75 end-to-end. ACE estimates that approximately 60% of passengers then transfer to local services to arrive at their final destinations.

In 2012, a 20% increase in ridership occurred, nearly double the growth rate of previous years. Ridership is at 1,100,000 passenger trips.

#### City of Escalon eTrans

The eTrans system services Escalon, Riverbank, and Modesto. With a population of 7,254, roughly 13.2% of Escalon residents are low income, 12.5% are elderly, 27.1% are youths, and 3.0% do not have access to a private vehicle. Until recently, eTrans Route 1 was the sole intercity route, operating as a deviated-route service between the Downtown Escalon Park and Ride Lot and Modesto. As of July 2015, eTrans operates fixed-route service from 8am to 5pm between Escalon and Modesto. Dial-A-Ride operates between 9am and 3:30pm. Basic fares are \$1.50 for local dial-a-ride and \$3.00 for intercity, with a \$1.00 surcharge for route deviations up to ¾ mile. Stanislaus Regional Transit (StaRT) accepts eTrans transfers. eTrans connects to Modesto Area Express (MAX), Ripon Blossom Express, RTD Rural General Public Dial-A-Ride and Modesto Area Dial-A-Ride, as well.

eTrans services have increased 5.8% during the Fiscal Year 2012/13. Annual ridership is at 3,300 one-way passenger-trips.

#### City of Lodi GrapeLine

The GrapeLine is the local bus system serving the City of Lodi. The city experienced a 9.1% growth in population over the last decade, with recent population estimates over 62,000. The population of Lodi includes 14.7% elderly, 15.7% low income, 16.7% youths, and 6.5% who do not have access to a private vehicle.



The GrapeLine offers both fixed-route and demand-responsive transit services within the city, seven days a week, in addition to regional connections to Stockton and Sacramento. Existing local fixed-route services include five weekday routes that operate on a frequency of 60 minutes with less frequent weekend service. The GrapeLine also offers three express routes during the morning and afternoons, connecting to various employment centers within Lodi. The general fee for fixed-route service (including express) is \$1.25 per trip.

GrapeLine services have increased 13.8 percent during the Fiscal Year 2013/14. Annual ridership reached nearly 245,000 passenger-trips.

#### **City of Manteca Transit**

Manteca Transit provides local bus service within the City of Manteca. With a population of over 67,000 residents, 11% of Manteca residents are low income, 10% are seniors, 25% are youth, and 2% do not have access to a private vehicle. As a new bus system, Manteca Transit provides three fixed routes within the city Monday through Friday between 6am and 7pm. These routes also provide connections to regional transit operated by San Joaquin Regional Transit District (RTD) via the Manteca Transit Center and the Altamont Corridor Express (ACE) Lathrop-Manteca rail station. General fares are \$1.00 per trip.

Manteca Transit services have increased 8.3 percent during the Fiscal Year 2013/14. Annual ridership is over 75,000 passenger trips.

#### **City of Ripon Blossom Express**

The Ripon Blossom Express is the local bus system providing transit service in the City of Ripon. With a population of 14,297 residents, 11.8% of Ripon residents were elderly, 9.7% were low income, 28.8% were youth, and 1.4% did not have access to a private vehicle. The City of Ripon purchased its first Compressed Natural Gas (CNG) bus called the Blossom Express in 2012. It operates Tuesdays and Thursdays with four continuous roundtrip loops from Ripon to Modesto. General bus fare is \$2.00. The City also owns a nine-passenger van providing local service to Modesto primarily for the elderly and residents with disabilities. Ridership is low, under 600 passengers a year. Fares are \$1.00. Due to the infancy of the Blossom Express, ridership information is limited to only two fiscal cycles. Annual ridership is at 1,300 passenger trips.

#### **San Joaquin Regional Transit District**

The San Joaquin Regional Transit District (RTD) is the regional transit provider for San Joaquin County, providing public transit services in the Stockton Metropolitan Area, as well as Intercity, Interregional, and Rural Transit Services countywide. With a population approaching 300,000 residents, 24.3% of Stockton residents were low income, 10.0% were elderly, and 29.9% were youths.

As the largest transit provider in San Joaquin County, RTD offers weekday services including local fixed-route (15 routes), the Metro Express Bus Rapid Transit (BRT) (3 routes), an intercity County Hopper (5 routes), Metro Hopper (9 routes), commuter bus (7 routes), a general public dial-a-ride, and curb-to-curb ADA Stockton Metro Area Dial-a-Ride. Basic fares are \$1.50 for local, intercity, and Hopper service and commuter bus service is \$7.00.



RTD services have increased 3.7 percent during the Fiscal Year 2013/14. Annual ridership is at 4,500,000 one-way passenger-trips.

### **City of Tracy TRACER**

The City of Tracy offers bus services to its residents with the TRACER bus system. With a population of approximately 82,923 residents, 8.2% of Tracy residents were low income, 6.9% were elderly, 32.2% were youth. The TRACER offers a range of services including fixed-route, door-to-door paratransit services, and subsidized taxi ADA service. Tracy is also serviced by regional connections available through RTD and ACE. Four weekday routes are offered between 7 am to 8 pm. There are also two commuter routes that operate during peak times of the morning and afternoon. Saturday service operates from 9 am to 7 pm. No service is available on Sundays. The general fee for fixed-route service is \$1.25 per trip and TRACER transfers are free for an hour.

TRACER fixed-route services have increased 2% during the Fiscal Year 2013/14. Annual ridership is at 142,000 passenger-trips.



## 4 Regional Transit Vision

*Provide a public transportation system that delivers mobility for San Joaquin County residents who are transit dependent and offers a viable option for those who are car dependent.*

As the population of San Joaquin County increases, traffic levels on freeways and city streets will also rise. Funding is limited for building or widening roads to keep pace with the increasing transportation demands of the region. Roadway improvements cannot be the only solution to increasing travel demand in a region with a population as diverse as its need for transportation options and accessibility. The regional solution is to create a public transportation system that addresses goals for environmental preservation, energy conservation, public health, the safety and security of the transportation system, and economic vitality.

In simple terms, the regional transit vision is to provide a public transportation system that delivers mobility for San Joaquin County residents who are transit dependent and offers a viable option for those who are car dependent. Such a transit system must be safe, reliable, accessible, convenient, cost-effective and sustainable. The transit system must also recognize the inherent differences of rural and urban transit trips in the San Joaquin region. This transit system must also be responsive to transit rider needs in system design, including the location of transit routes, transit frequency, and transit affordability.

The overall regional transit vision is a public transportation system integrated within communities to ensure long-term system viability and to keep pace with travel demand. In doing so, the transit system must foster economic vitality by moving people to jobs, schools, services, commercial centers, and other community resources. Implementation of such a public transit system, in addition, must closely take into account neighborhood livability, environmental and open space preservation, sustainability, and cost-effectiveness for all routes and services.

### Regional Transit Vision Influenced by Other Plans

The Systems Plan is one of the implementation tools to advance the region's overall long-term transportation plan. In 2014, SJCOG completed the Regional Transportation Plan/Sustainable Communities Strategy (RTP/SCS). The RTP/SCS represents a new chapter in the development of the San Joaquin region's transportation system. It is comprehensive in its response to new federal statutes embodied in the MAP-21 (Moving Ahead for Progress in the 21st Century) and state statutes including Senate Bill (SB) 375.

The RTP/SCS addresses the transportation issues of the San Joaquin region and quantifies regional needs within the 2014–2040 planning horizon. SJCOG developed the plan with a vision for sustainability, recognizing the significant impact the transportation network has on the regional public health, mobility, and economic vitality. It presents a wide range of multimodal transportation improvements that can be financed within available funding sources. A summary of the policies and supportive strategies from the RTP/SCS are in Figure A6.



Figure A6: RTP/SCS Policies & Supportive Strategies

Regional Transportation Plan/Sustainable Communities Strategy: Policy and Supportive Strategies	
<b>Policy:</b>	<b>Enhance the Environment for Existing and Future Generations and Conserve Energy</b>
Strategy #1:	Encourage Efficient Development Patterns that Maintain Agricultural Viability and Natural Resources
Strategy #2:	Enhance the Connection between Land Use and Transportation Choices through Projects Supporting Energy and Water Efficiency
Strategy #3:	Improve Air Quality by Reducing Transportation-Related Emissions
<b>Policy:</b>	<b>Maximize Mobility and Accessibility</b>
Strategy #4:	Improve Regional Transportation System Efficiency
Strategy #5:	Optimize Public Transportation System to Provide Efficient and Convenient Access for Users at All Income Levels
Strategy #6:	Facilitate Transit-Oriented Development to Maximize Existing Transit Investments
Strategy #7:	Provide Transportation Improvements to Facilitate Non-Motorized Travel
Strategy #8:	Improve Major Transportation Corridors to Minimize Impacts on Rural Roads
<b>Policy:</b>	<b>Increase Safety and Security</b>
Strategy #9:	Facilitate Projects that Reduce the Number of and Severity of Traffic Incidents
Strategy #10:	Encourage and Support Projects that Increase Safety and Security
Strategy #11:	Improve Communication and Coordination between Agencies and Public for Emergency Preparedness
<b>Policy:</b>	<b>Preserve the Efficiency of the Existing Transportation System</b>
Strategy #12:	Optimize Existing Transportation System Capacity through Available and/or Innovative Strategies
Strategy #13:	Support the Continued Maintenance and Preservation of the Existing Transportation System
Strategy #14:	Encourage System Efficiency with Transportation Improvements that Facilitate Great Jobs/Housing Balance
Strategy #15:	Improve Transportation Options Linking Residents to Employment Centers within and out of the County



<b>Policy: Support Economic Vitality</b>
Strategy #16: Improve Freight Access to Key Strategic Economic Centers
Strategy #17: Promote Safe and Efficient Strategies to Improve the Movement of Goods by Water, Air, Rail, and Truck
Strategy #18: Support Transportation Improvements that Improve Economic Competitiveness and/or Revitalization of Commercial Corridors and Strategic Economic Centers
<b>Policy: Promote Interagency Coordination and Public Participation for Transportation Decision-Making and Planning Efforts</b>
Strategy #19: Provide Equitable Access to Transportation Planning
Strategy #20: Engage the Public Early, Clearly, and Continuously
Strategy #21: Use a Variety of Methods to Engage the Public, Encouraging Representation from Diverse Income and Ethnic Backgrounds
<b>Policy: Maximize Cost-Effectiveness</b>
Strategy #22: Support the Use of State and Federal Grants to Supplement Local Funding and Pursue Discretionary Grant Funding Opportunities from Outside the Region
Strategy #23: Support Projects that Maximize Cost Effectiveness
Strategy #24: Maximize Funding of Existing Transportation Options
<b>Policy: Improve the Quality of Life for Residents</b>
Strategy #25: Encourage Transportation Investments that Support a Greater Mix of Housing Options at All Income Levels
Strategy #26: Improve the Connection Between Land Use and Transportation
Strategy #27: Enhance Public Health through Active Transportation Projects

Source: SJCOC 2014 Regional Transportation Plan/Sustainable Communities Strategy



Prior to the RTP/SCS, SJCOG completed the 2009 San Joaquin County Regional Transit Systems Plan (RTSP) which presented recommendations for expanding the transit system components within the county to meet long-term travel demand needs. The RTSP identified strategies to reduce congestion through increased density, multimodal and commercial joint developments, transit expansions, and support for alternative modes of travel throughout the county. In addition, six goals were identified, including:

1. *Implement effective ridership programs countywide such as continuing work toward the implementation of San Joaquin County 511; incorporation of San Joaquin County transit routes into Google transit; and the addition of global positioning units on buses to enable real time transit information to be collected.*
2. *Develop a transit system which addresses to the greatest extent possible the needs for air quality and congestion management.*
3. *Provide a transit system serving county residents which is efficient and cost-effective.*
4. *Provide an emphasis on the multimodal nature and intermodal opportunities in San Joaquin County.*
5. *Explore the opportunities for extending services into additional travel markets.*
6. *Provide a mechanism whereby service is responsive to local needs to enhance the opportunities for all county riders.*

The goals of the 2009 RTSP are a cornerstone in the 2014 SJCOG RTP/SCS Plan. As stated earlier, this Systems Plan carries forward the sustainability vision and goals from both planning documents.

## Objectives of the Regional Transit Systems Plan

*Strategic Investments in Public Transportation, including exploration of “green” technologies: The Systems Plan must promote equity in transportation by creating a system built on transportation choices.*

The provision of alternative transportation modes must be viable and cost-effective in order to de-emphasize the reliance on single occupancy vehicles (SOV). With limited revenue, investment decisions for bus and rail transit must examine thoroughly the following factors in the decision making process: capital and operating expenses; transit maintenance vs. expansion; innovative, technological or “green” solutions (in lieu of traditional transit investments). Weighing the cost-effectiveness of different options is essential.

*Maintenance of the Existing Transit System: A financially viable and sustainable regional transit system has to prioritize preventative maintenance.* A properly maintained transit system is critical to the mobility of the region, as well as keeping a competitive edge to that of the automobile. While the maintenance activities for the transit system vary among the different transit operators, the challenge to sustain the system is similar to the maintenance of the roadway system. Unique to the transit system are the ongoing, necessary operating costs of fuel purchases, drivers, mechanics, dispatchers, and equipment and facility leases. Additionally, the cost for the replacement of buses, train cars, tracks, security upgrades, fare machines, and other capital equipment far outpaces available funds. And just as with local streets and roads, delayed (or deferred) maintenance of the transit system leads to even costlier rehabilitation down the road.



*Community Interconnectivity (Between and within Urban and Rural areas): With the green belts surrounding cities in San Joaquin County, the communities throughout the region understand the value of transportation connections.* More specifically, objectives of the Systems Plan are to enhance safe, coordinated inter- and intra-regional transit service connections to and from urbanized and rural areas. Examples include:

1. Interregional travel from San Joaquin County (Stockton, Manteca, Lodi, and Ripon) to adjacent counties (i.e. Sacramento, Stanislaus, Contra Costa, Alameda, Santa Clara, and San Francisco);
2. Connections to community assets in the Stockton Metropolitan Area (i.e. hospitals, commercial centers, job centers, colleges/universities); and
3. Travel from rural communities such as Lockeford and Clements to other cities in San Joaquin County.

*Integrating transit with supportive land use development strategies to improve transit viability, air quality, and public health: Finding ways to provide transit service in a cost-efficient manner is a key objective of the Systems Plan.* Such strategies must meet public need and support land use patterns. Transit investments in concert with land use development may facilitate mixed or infill development and foster transit oriented communities. Such strategies include increasing land use density to support transit routes in areas with multi-family dwellings. Another example is construction of multimodal stations surrounded by residential and commercial developments. These transit hubs can be conveniently served by a myriad of alternative transportation modes, such as park-and ride lots, bicycle facilities, pedestrian amenities, trains, buses, and telecommute work stations.

This integration of transit planning with land use can foster walkable communities and have added benefits to enhancing public health in communities.

*Addressing the Needs of an Aging and Transit Dependent Population: Adequate transit service for aging and disabled citizens is an essential part of an effective public transportation system.* Transit service must accommodate the anticipated rise of the elderly population, who continue to value mobility but seek options to the automobile. In addition, there is a small population of San Joaquin County residents who do not have a valid driver license-- some for reasons of disability or other circumstances. Therefore, general public transit systems and coordination with social services transportation is key in the Systems Plan. Transit planning specific to this core group of transit riders will enhance access and quality of life in the San Joaquin region.

*Providing rail transit to meet longer distance commute travel demand: The increased congestion on major highways in San Joaquin County as well as the projected growth along these corridors underscore the importance of travel options to meet future commuter and intercity travel demand.* For this reason, a multimodal transit system in the San Joaquin region includes passenger rail transit. Rail transit addresses commuter needs for travel between Stockton and San Jose. The San Joaquin Regional Rail Commission will continue to develop track improvements in conjunction with Caltrans and the AMTRAK Capital Corridor. In the longer term, aspirational planning efforts through the ACEforward initiative call for extension of service to Sacramento, to Modesto in Stanislaus County, and further south to Merced in Merced County. Such a connection positions the commuter rail service to possible connection with the proposed High Speed Rail service from Merced to the San Fernando Valley.



*Create a 3C public involvement process that is Comprehensive, Cooperative, and Continuous: Transit planning must be facilitated through an open, inclusive process involving the public, local public transit providers, and stakeholders from other jurisdictions.* SJCOG recognizes that investments in any particular subarea yield benefits throughout the region, and that these shared benefits support the San Joaquin County region. In order to accomplish this, the planning process must clearly identify affected parties and encourage creative collaboration and dialogue on transportation investments and solutions.

In conclusion, these sustainability goals, strategic investments and community regionalism concepts relate to a core theme in regional transit systems planning— an investment in transit is an investment in the region's economic prosperity and longevity. High-quality transit can support San Joaquin County economic growth and create jobs. Regional transit connections can combat greenhouse gas emissions and improve air quality. The presence of community transit stations encourage long-term commitments from developers to invest in mixed-use development in existing urban core communities. Coordinating our local transit to work seamlessly with other regional systems in neighboring counties, holds our neighbor jurisdictions publicly accountable for responsible transit investments for interregional sustainability. High-capacity transit corridors promote equity and efficient use of limited resources. Strategic investments in public transportation must keep pace with San Joaquin's growing population, and consequently the Northern California megaregion. Doing so, the regional transit system will play a major role in economic stability and economic development viability throughout San Joaquin County.

**An investment in transit is an investment in the region's economic prosperity & longevity.**

# REGIONAL TRANSIT SYSTEM NETWORK





## 1 Overview of Network

As stated earlier in the Systems Plan, the San Joaquin Council of Governments is responsible for long-term transit planning for the San Joaquin region. This planning function is performed in collaborative partnership with bus transit and rail transit operators. These operators are:

- » *San Joaquin Regional Transit District (RTD)*
- » *San Joaquin Regional Rail Commission (ACE)*
- » *City of Escalon (eTrans)*
- » *City of Lodi (GrapeLine)*
- » *City of Manteca (Manteca Transit)*
- » *City of Ripon (Blossom Express)*
- » *City of Tracy (TRACER)*

These operators provide multiple and varied types of public transit systems in San Joaquin County. In general, these transit system types fall into seven distinct categories as shown in Figure B1.

This section describes the existing and planned transit operations and capital needs for each transit operator. Each operator provided information on projected needs and was asked by SJCOG to address needs under conditions of financial constraint. The information sources used in the Systems Plan are summarized in Figure B2. In order to refresh information and to ensure the Systems Plan is current, more recent input from transit operators was incorporated in the data compilation.

Figure B1: Transit Systems in San Joaquin Region, By System Type

System Type	Public Transit System
Interregional Transit	ACE RTD
Intercity Transit	City of Escalon eTrans City of Ripon Blossom Express RTD
Urban Fixed Route	RTD
Small Urban (population 50,000 – 200,000)	City of Lodi GrapeLine City of Lodi Dial-A-Ride City of Tracy TRACER City of Tracy TRACER Paratransit City of Manteca Transit City of Manteca Transit Dial-A-Ride City of Ripon Blossom Express
Rural	City of Escalon eTrans RTD – General Public Dial-A-Ride
Non-Taxi Paratransit (not general public) Dial-A-Ride	RTD – SMA ADA Dial-A-Ride City of Lodi VineLine
Taxi Paratransit	City of Tracy TRACER Paratransit Taxi

Source: SJCOG



Figure B2: Short Range Transit Plans

Transit Agency	Name of SRTP	Fiscal Year Span	Number of Years Covered in Plan	Document Date
San Joaquin RTD	RTD SRTP	FY13/14 – FY17-18	5 Years	11/20/2013
San Joaquin Regional Rail Commission	SJRRC SRTP	FY 11/12 –FY 20/21	10 Years	11/02/2012
City of Escalon	10-Year SRTP	FY11/12 – FY20/21	10 Years	06/18/2012
City of Lodi	City of Lodi SRTP	FY13/14 – FY22/23	10 Years	09/09/2013
City of Manteca	Manteca Transit SRTP	FY13/14 – FY19/20	7 Years	05/20/2014
City of Ripon	SRTP 2010 – 2020	FY13/14 – FY17/18	5 Years	11/20/2013
City of Tracy	City of Tracy SRTP	FY 08/09 – FY18/19	10 Years	05/01/2009

Source: SJCOG

There were some challenges in utilizing Short Range Transit Plans from the various operators as the above chart illustrates. Most plans dated back to 2012 or 2013, thus were at least three years old when the Systems Plan was being developed. Also, the number of years covered in each plan varied between an analysis period of five years and ten years.

This inconsistency in Short Range Transit Plans required SJCOG to work closely with transit agencies to update information and forecasts. The one-on-one meetings and cooperation of agencies to fill out tables and other detailed data meant the Systems Plan would include

the most current assumptions. As a result, this Systems Plan has the most current data on transit needs and costs, as reported by the transit operators.



Figure B3: SJCOG Systems Plan Stakeholder Input



Source: SJCOG

### The Planning Process

The planning process for the Systems Plan was extensive, requiring a thorough examination and approach to determine the regional transit vision. SJCOG worked with the transit agencies, as well as utilized the SJCOG Interagency Transit Committee to brainstorm draft concepts and issues, draft technical chapters, and discuss financial policy hurdles.

Specific to this chapter, the transit agencies conducted multiple rounds of critical review and performed related modifications and refinements. The Planning Process also included a workshop in October 2015 for the SJCOG Board of Directors to go over initial challenges, concepts, and policy considerations in the regional transit vision.

When the formal public comment period opened on the public draft of the Systems Plan, the process included a 30-day public review, public workshops, Board member workshops, and various discussions at SJCOG Committees and Board meetings.

## Interagency Transit Committee

**Members:**

- City of Escalon
- City of Lathrop
- City of Lodi
- City of Manteca
- City of Ripon
- City of Tracy
- San Joaquin Regional Rail Commission
- San Joaquin Regional Transit District

**About the Committee:**

The Interagency Transit Committee (ITC) was created in August 2004 to improve communication and coordination among the transit agencies within the San Joaquin County and to improve the transit experience for the end user. The membership is comprised of representatives from each of the transit agencies as well as from each member jurisdiction. Annually, the committee focuses on setting goals and meeting objectives for the year ahead.



# PLANNING PROCESS

for the Regional  
 Transit Systems Plan

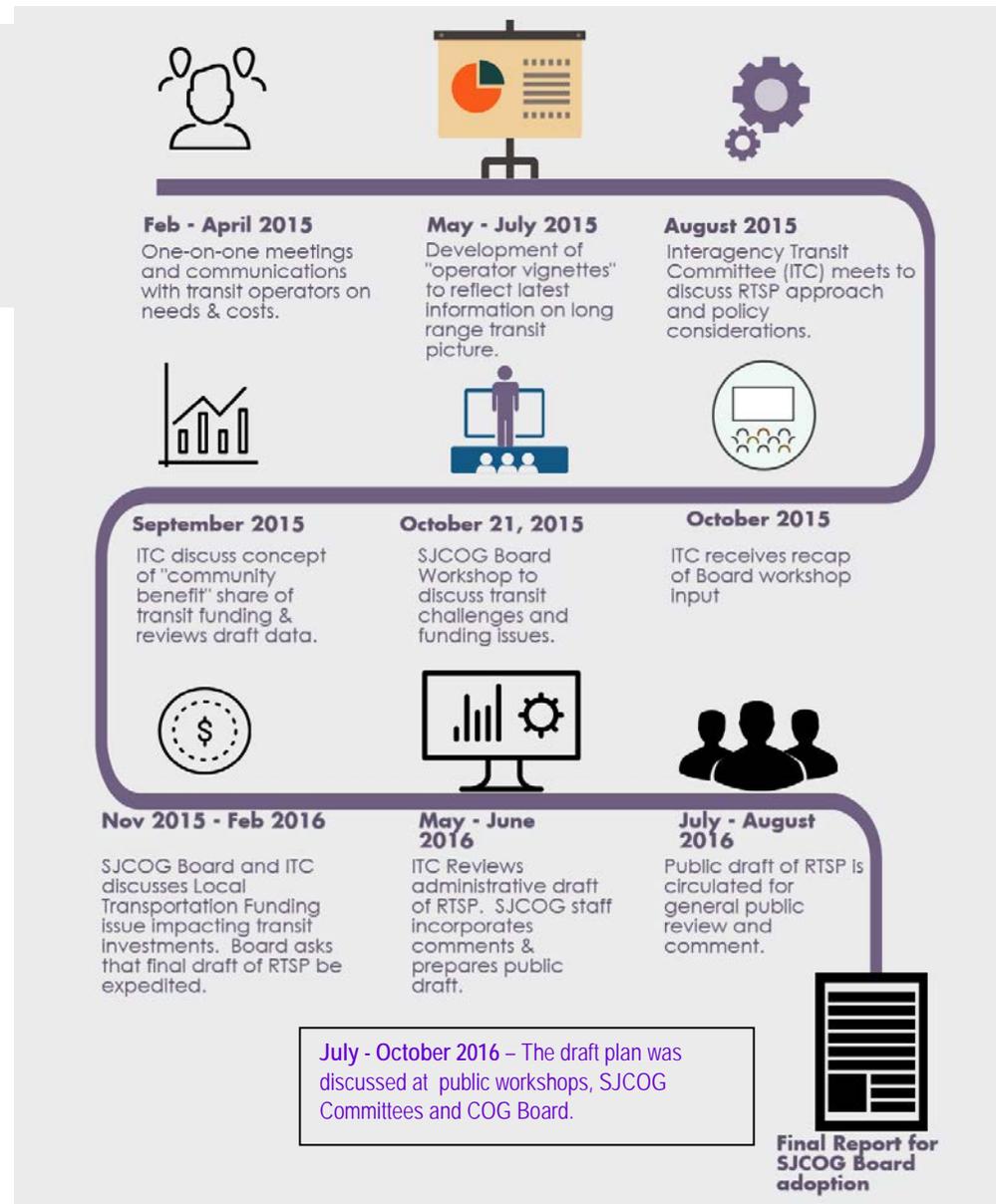


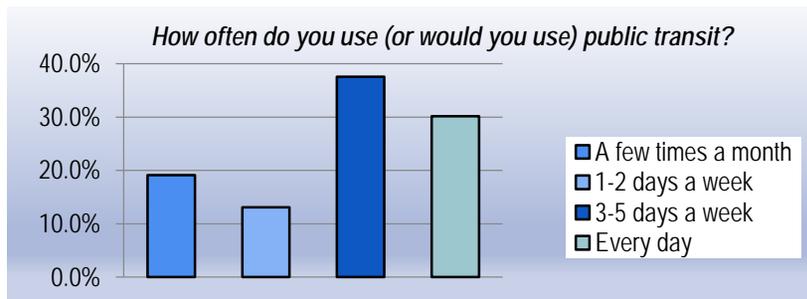
Figure B4: Planning Process



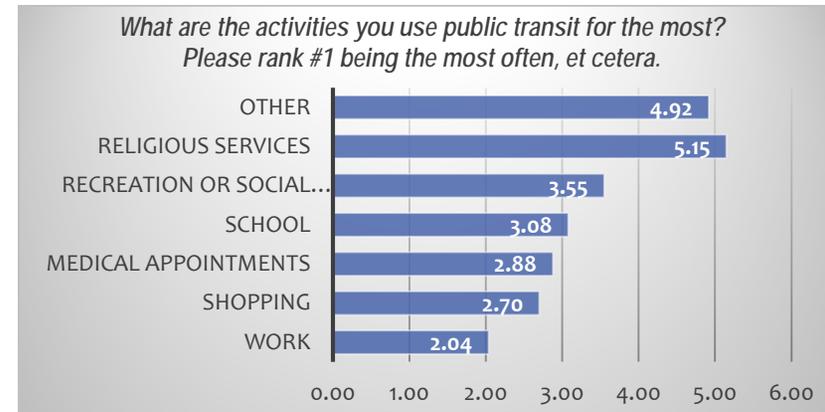
## Public Transit Survey

SJCOG also reached out to the general public to garner initial input on transit needs and priorities. A survey was posted on the SJCOG website in English and Spanish. *A total of 423 responses were received between July 17, 2015 and February 25, 2016.* The results of survey are summarized in this section. A full copy of the survey responses is provided in Appendix A.

While a majority of respondents indicated that they reside in Stockton, the employment location of the respondents was more varied, with 12.3% of respondents working the San Francisco Bay Area, in addition to 15.1% unemployed and 5.9% retired.

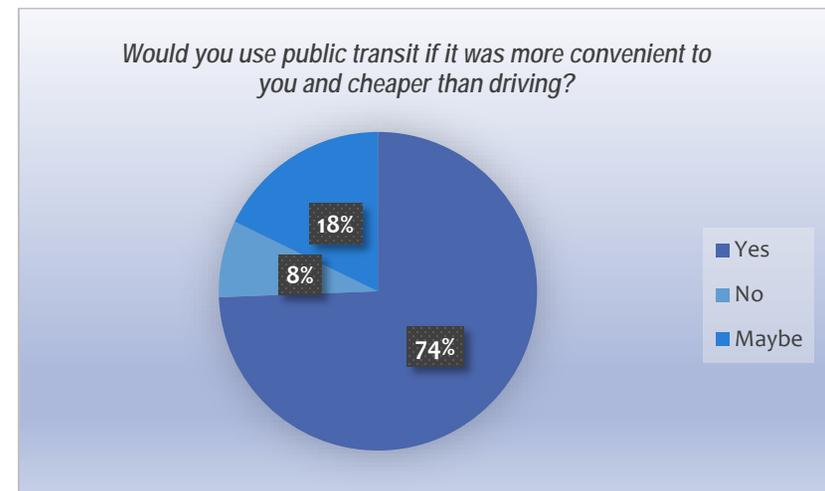


79% of respondents currently use public transit of some sort, with the vast majority indicating that they use some type of service provided by RTD. The number of responses for other bus operators correlated with the ridership numbers of each transit system, in decreasing order; Lodi GrapeLine, Tracy TRACER, Manteca Transit, Escalon eTrans, and Ripon Blossom Express. In addition, 11% of respondents indicated that they ride the ACE train. Some respondents also noted that they utilize a variety of transit services provided by other agencies outside of San Joaquin County.



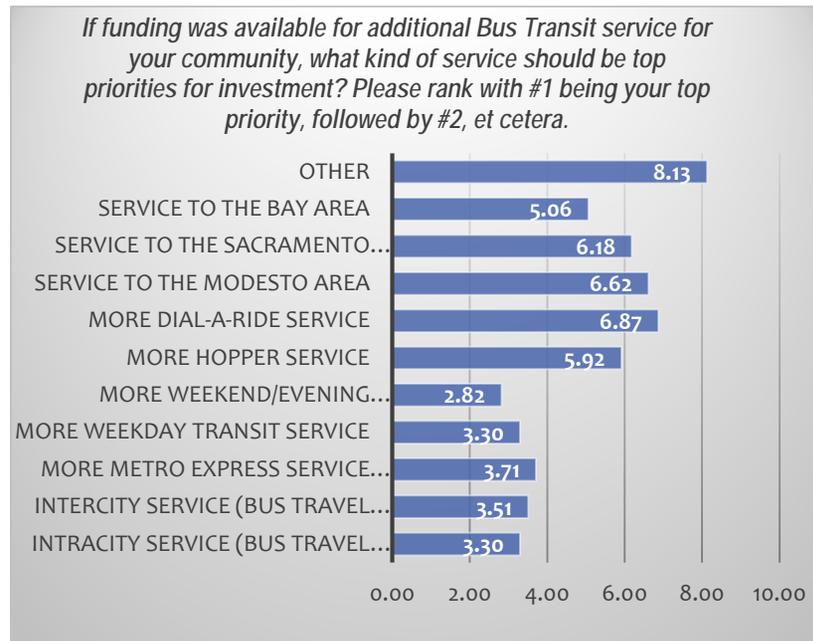
Note: Lower values indicate higher rank/priority. Work at a (weighted average) value of 2.04 is the highest rank.

Of the respondents that do not currently use public transit, 74% indicated that they would use public transit if it were more convenient to them and cheaper than driving.





The highest interest among survey respondents was for more weekend and evening service, followed by intracity travel (travel within communities) and more weekday service. The survey also showed the least interest in additional bus service for interregional travel, that is travel between counties. Service to the Bay Area, Sacramento Area, and Modesto (Stanislaus County) were cited as areas for potential investment.

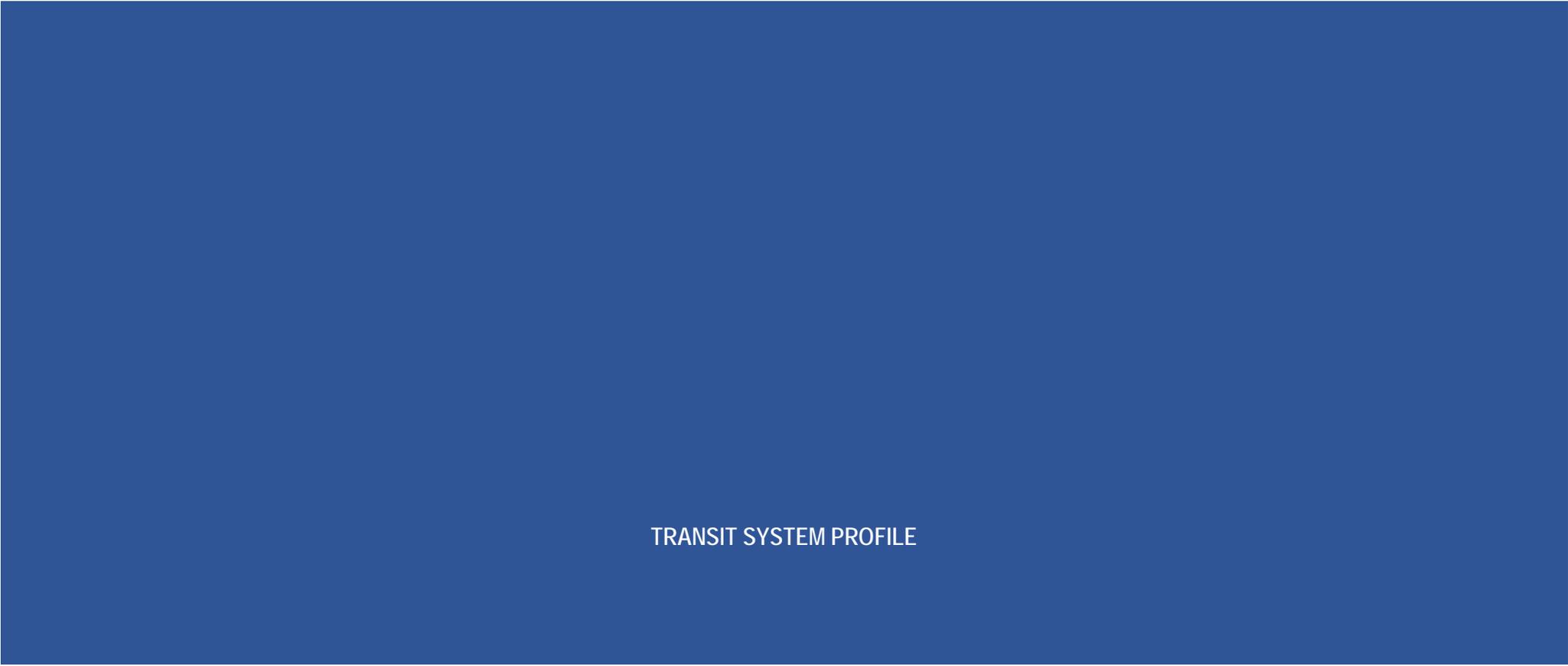


Note: Lower values indicate higher rank/priority. Weekend/evening service at a (weighted average) value of 2.82 has the highest rank/priority.

When asked about rail transit investments, there was stronger interest in additional ACE commuter trains to/from Modesto, with possible service to Downtown Ripon and Downtown Manteca. Following this as a priority interest was commuter trains to the Sacramento area with possible service to Downtown Lodi.



## 2 SAN JOAQUIN REGIONAL TRANSIT DISTRICT



TRANSIT SYSTEM PROFILE



## SAN JOAQUIN REGIONAL TRANSIT DISTRICT

The San Joaquin Regional Transit District operates in Stockton, the largest city within San Joaquin County, with connections throughout the county. Stockton had a population of 298,118 in 2010. Median household income was \$46,831 in 2013, which is lower than the county average of \$51,432. Of the citywide population, 24.3% were low-income, 10.0% were elderly, and 29.9% were youths. These segments of the population tend to be most dependent on transit service. System-wide ridership in 2014 on all services was 4,488,761 one-way passenger-trips, an increase of 4.4 percent over 2013.

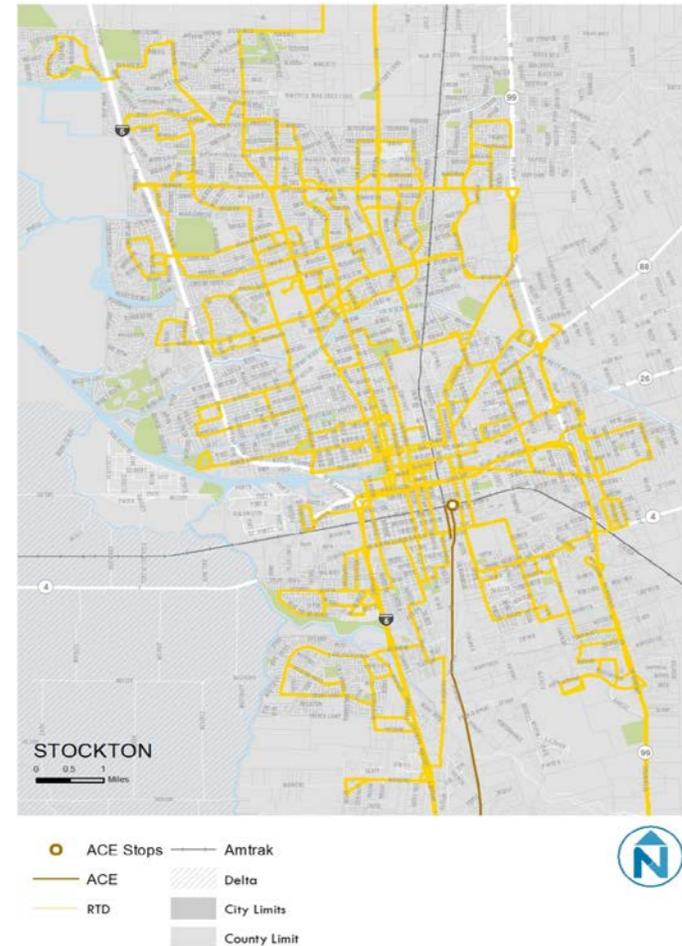
### Transit System at a Glance

San Joaquin Regional Transit District (RTD) is the largest transit provider in San Joaquin County, offering local fixed-route service, the Metro Express Bus Rapid Transit (BRT) service, an intercity County Hopper service, Metro Hopper, commuter service, a general public dial-a-ride, and curb-to-curb ADA Stockton Metropolitan Area (SMA) Dial-a-Ride (DAR). On weekdays, RTD operates 15 local routes, 3 BRT routes, 10 limited weekday crosstown routes, 1 intercity route from Stockton to Lodi, 11 commuter routes, 9 Metro Hopper routes, and 4 County Hopper routes. On weekends, RTD operates 5 local routes, 3 BRT routes, and 2 County Hopper routes. RTD operates the majority of service directly, but approximately 40% of service is contracted to private vendors. In addition, RTD operates transit services for the cities of Escalon and Ripon as a contractor. Examples of the connections to other transit services include, but not limited to, eTrans, Blossom Express, TRACER, GrapeLine, SCT/LINK, Calaveras Transit, Modesto Area Express, ACE, Amtrak, and Greyhound.

Basic fares are \$1.50 for local, intercity, and Hopper service. A day pass costs \$4.00, and 31-day passes are \$65.00. Hopper service charges for \$1.00 for ADA-certified deviations. ADA Stockton Metropolitan Area Dial-a-Ride fare is \$3.00 per one-way trip. There are discounts for disabled, seniors 65 and older, and for students (with IDs) purchasing 31-day passes. Commuter bus service offers a \$7.00 one-way fare, with monthly options that vary from \$132.00 to \$205.00 depending on the route.

In 2008, despite a projected operating budget of \$42 million RTD's budget was reduced to \$30 million, 29% less than planned. Seven years later with only minor budget increases, RTD has been able to return to previous ridership levels. In the last five years, RTD has invested nearly \$150 million in federal and state capital funds on ongoing improvements and capital projects such as continuing buildout of its Metro Express BRT service. In contrast, RTD's bus service level has been reduced due to sharp declines in operating funds associated with budget shortfalls. In addition, funding sources to replace and purchase additional buses, maintain RTD's infrastructure in a state of good repair, and implement new technologies for better communication with customers, are not identified or guaranteed. As economic conditions improve and policy goals become more progressive, RTD seeks to be more effective as a regional transit provider by finding cost effective ways to improve frequency and performance. An example of cost-effective operating strategies – RTD contracts with United Cerebral Palsy (UCP) to provide SMA ADA Dial-A-Ride trips at a fraction of the normal cost.

Figure 1: Stockton RTD Core Service Area





## Performance Measures

Figure 2 shows RTD Farebox Recovery Ratio by type of service each year. Figure 3 shows an example of RTD financial performance, disaggregated by type of service. Figure 4 provides a year-by-year summary of performance.

Figure 2: Farebox Recovery Ratio

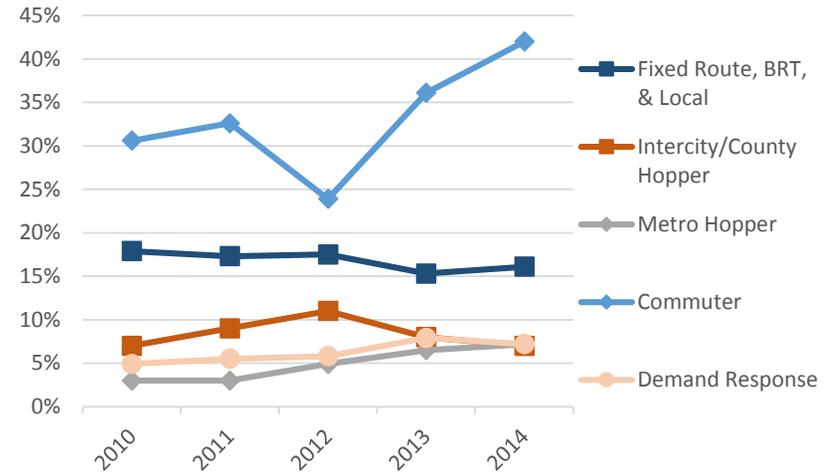


Figure 3: Operating Cost per Revenue Hour

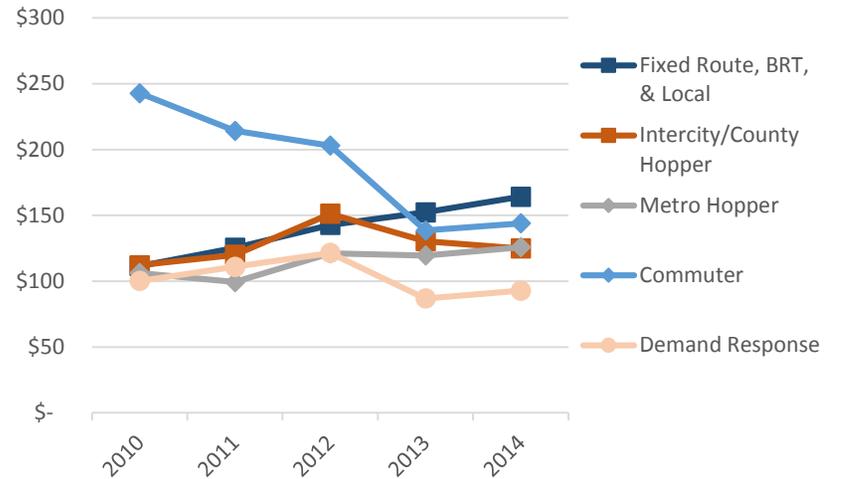




Figure 4: Performance Measures for Transit Operations

Service Type	Fiscal Year	Ridership	Revenue Hours	Revenue Miles	Fully Allocated Operating Cost per Revenue Hr	Fully Allocated Operating Cost per Passenger	Farebox Recovery Ratio	Passengers per Revenue Hr	Passengers per Revenue Mile	Subsidy per Passenger
Fixed-Route BRT and Local	2009/10	3,659,855	163,324	1,871,373	\$111.61	\$4.98	17.9%	22.4	2.0	\$4.09
	2010/11	3,439,225	145,546	1,691,972	\$125.29	\$5.32	17.3%	23.6	2.0	\$4.40
	2011/12	3,571,256	127,480	1,510,605	\$142.77	\$5.10	17.5%	28.0	2.4	\$4.20
	2012/13	3,597,641	127,342	1,503,602	\$152.29	\$5.39	15.3%	28.3	2.4	\$4.57
	2013/14	3,739,325	115,101	1,330,376	\$164.15	\$5.05	16.1%	32.5	2.8	\$4.24
Intercity /County Hopper	2009/10	358,823	38,245	707,790	\$112.18	\$11.96	7.0%	9.4	0.5	\$11.10
	2010/11	311,618	36,283	657,762	\$120.07	\$13.98	9.0%	8.6	0.5	\$12.80
	2011/12	308,684	25,457	490,311	\$151.28	\$12.48	11.0%	12.1	0.6	\$11.10
	2012/13	277,859	21,566	419,060	\$130.47	\$10.13	8.0%	12.9	0.7	\$9.30
	2013/14	289,616	25,270	522,972	\$124.81	\$10.89	7.0%	11.5	0.6	\$10.10
Metro Hopper	2009/10	57,185	14,719	128,836	\$106.19	\$27.33	3.0%	3.9	0.4	\$26.50
	2010/11	67,399	21,866	159,913	\$99.35	\$32.23	3.0%	3.1	0.4	\$31.10
	2011/12	107,033	21,961	205,481	\$121.29	\$24.89	5.0%	4.9	0.5	\$23.70
	2012/13	138,142	21,106	209,811	\$119.58	\$18.27	5.0%	6.5	0.7	\$17.40
	2013/14	167,186	23,284	235,612	\$125.84	\$17.53	5.0%	7.2	0.7	\$16.70
Commuter	2009/10	286,161	16,104	675,936	\$242.76	\$13.66	30.6%	17.8	0.4	\$9.48
	2010/11	246,439	16,908	547,595	\$214.23	\$14.70	32.6%	14.6	0.5	\$9.90
	2011/12	207,230	17,489	493,178	\$202.95	\$17.13	23.9%	11.8	0.4	\$13.03
	2012/13	213,168	17,805	487,835	\$138.52	\$11.57	36.1%	12.0	0.4	\$7.39
	2013/14	213,895	17,215	524,841	\$144.01	\$11.59	42.0%	12.4	0.4	\$6.72
Demand Response	2009/10	61,414	20,385	269,853	\$100.20	\$33.26	4.9%	3.0	0.2	\$31.62
	2010/11	75,233	16,353	232,991	\$110.95	\$24.12	5.5%	4.6	0.3	\$22.78
	2011/12	70,028	19,520	289,606	\$121.48	\$33.86	5.8%	3.6	0.2	\$31.90
	2012/13	70,966	19,897	316,610	\$86.90	\$24.36	7.9%	3.6	0.2	\$22.45
	2013/14	78,739	25,666	359,152	\$92.84	\$30.26	7.2%	3.1	0.2	\$28.08

In an effort to balance the needs of the growing community while concurrently experiencing declining revenues, RTD has redirected its service design to focus on expanding and promoting those services that provide the most benefit to the local community. RTD regularly reviews its services, equipment, and facilities to achieve greater operating efficiencies. This is even more critical now, when operating funds are being reduced or diverted, despite ridership increases. Using a scorecard system for analyzing route efficiency, RTD has recently reduced or eliminated underperforming routes and monitors services on a route-by-route basis.

RTD has invested in TransTrack, a business intelligence software that pulls together, organizes, and reports independent data into meaningful performance indicators. The independent data are periodically validated in order to ensure meaningful reports. In addition, RTD has formally joined with 20 peer medium-sized transit agencies across the United States to share performance statistics and best practices to ensure RTD's business and operating plans are optimized to receive the best return on its capital and operating investments.



RTD fixed route ridership decreased after the recession and service cuts in FY 09/10 and FY 11/12, but in FY 13/14 grew past its FY 09/10 numbers, even as revenue hours and miles are at their lowest in those five years. The Intercity Hopper routes have seen a decrease in ridership, perhaps due to a modest decrease in revenue hours and miles. The Metro Hopper routes have seen a large increase in ridership, as well as a growth in revenue hours and miles. The commuter service saw a ridership decrease of 25.3% between 2010 and 2014, despite a reduction of service hours of only 6%. Farebox Recovery Ratio does not meet the 20% TDA funding requirement for local fixed route, BRT, or Intercity Hopper service. This finding is perhaps most noteworthy for Fixed Route service, which came closest in FY 09/10. Since then, Farebox Recovery Ratio has fluctuated while Passengers per Hour and Passengers per Mile have moved in the right direction. The Farebox Recovery Ratio appears to be holding steady for fixed route service, but is growing for Metro Hopper. Among the various services, the commuter service showed the strongest farebox recovery ratios over the FY 09/10 to FY 13/14 period, with an upward trend. Dial-a-ride ridership experienced a large increase in FY 13/14, and has fluctuated over the past five years, even as revenue miles has increased, peaking in FY 13/14. Passengers per Hour is trending up for the local, BRT, and Metro Hopper service, whereas the performance on the Commuter routes has not recovered from FY 09/10.

## Anticipated Funding Picture

RTD receives funding from local, state, regional and federal sources. Specifically, RTD makes use of the funding sources listed in Figure 5. Over the next ten years RTD has planned several projects focused on improving frequency, performance, and comfort of its services.

RTD was asked by SJCOG, for the purposes of the Systems Plan, to identify a “scaled-back” capital and operating picture focused on maintaining existing transit service with minimal expansion and the implementation of only two (of the four RTD anticipates are needed) new Bus Rapid Transit (BRT) systems. To be responsive to SJCOG’s parameters, RTD staff provided funding assumptions for a “scaled down” capital program and related operating costs. This is not the system RTD asserts will meet the growing transit needs. Therefore the costs associated with the continued operation of existing services (with minimal expansion) and anticipated revenue available to fund these projects and operations are summarized in Figure 6 and 7. Details related to planned capital expenditures are described below:

- **Bus Replacement** –Purchase 48 standard buses, 48 Hopper buses, 14 commuter buses, and 42 non-revenue vehicles
- **Bus Expansion** – Purchase 3 buses for Hopper service
- **MLK and Crosstown Miner BRT Expansion** – Creation of two new BRT Corridors on Martin Luther King Jr. Blvd and the Crosstown/Miner Avenue Corridor, with an associated six bus expansion
- **Automatic Vehicle Locator (AVL) and communications equipment on buses**
- **Information Technology** – Agency-wide servers, backups, and work station replacements
- **Facility and Maintenance Equipment**
- **Safety and Security** – Surveillance cameras, fencing, safety modifications to facilities, and tools and equipment for emergencies
- **Passenger Amenities** – Shelters, benches, trash cans, lighting, and information displays

Again, it should be noted that this expenditure plan accounts for minimal planned changes that RTD deems necessary to adapt to the current transportation needs of the region. This level of service still carries forward a majority of the service and staffing reductions that were compulsory after the 2008 recession. The changes include expansion of Metro Hopper to save money by replacing the traditional and more expensive Dial-A-Ride trips. The deviated fixed-route service operates on a schedule, but includes extra time to deviate and provide curb-to-curb service for ADA certified customers. This addition will accomplish the goal of expanding levels of service while at the same time meeting ADA requirements and reducing the cost of

Figure 5: Transit Funding Sources

Local Funds & Fare Revenue	Regional & State Funds	Federal Funds
Passenger Fares	Measure K	FTA 5307
Annual Local Transportation Funds Operating Revenues (collected locally and redistributed by state)	State Transit Assistance (STA)	CMAQ
	Proposition 1B - PTMISEA	FTA 5312
	Proposition 1B - TSSSDRA	
	State Cap & Trade	



Dial-A-Ride services. This Baseline scenario also includes the MLK and Crosstown Miner BRT expansions because the project has been fully funded with Measure K and competitive state and federal grant funding, and will extend the benefits of RTD's existing BRT system to some of the most disadvantaged communities within Stockton. There will also be some restructuring in RTD's commuter service as RTD plans to increase service to BART and replace some of RTD's traditional commuter routes with a more flexible and cost effective vanpool program. This scenario includes a 10% fare increase to be implemented in 2018 and 2021.



Figure 6: Financial Summary for Transit Capital Projects

	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
FTA 5307	\$467,393	\$713,814	\$713,814	\$713,814	\$713,814	\$713,814	\$713,814	\$713,814	\$713,814	\$713,814	\$6,891,719
Prior Years FTA 5307	\$35,970	\$169,500	-	-	-	-	-	-	-	-	\$205,470
CMAQ – Standard Bus Replacement	-	-	-	\$4,287,359	-	-	-	-	-	-	\$4,287,359
CMAQ – Hopper Bus Replacement	-	\$300,000	-	-	-	-	-	-	-	-	\$300,000
CMAQ – Non-Revenue Bus Replacement	-	-	-	-	-	-	-	-	-	-	\$0
CMAQ – BRT Corridor Expansion	-	-	-	\$3,700,000	-	-	-	-	-	-	\$3,700,000
FTA 5312	-	\$2,550,000	-	\$606,900	-	-	-	-	-	-	\$3,156,900
State Cap and Trade: TIRCP	-	-	-	\$6,841,928	-	-	-	-	-	-	\$6,841,928
Prop 1B PTMISEA	\$463,879	\$2,359,000	-	\$1,114,849	-	-	-	-	-	-	\$3,937,728
Prop 1B TSSSDRA	\$63,233	\$14,998	-	-	-	-	-	-	-	-	\$78,231
STA	\$291,848	\$387,279	\$377,809	\$377,809	\$377,809	\$377,809	\$377,809	\$377,809	\$377,809	\$377,809	\$3,701,600
Measure K – Passenger Amenities	-	\$104,325	-	-	-	-	-	-	-	-	\$104,325
Measure K – BRT Passenger Amenities	-	-	-	\$3,436,722	-	\$25,900	-	-	-	-	\$3,462,622
<b>Subtotal</b>	<b>\$1,322,323</b>	<b>\$6,598,916</b>	<b>\$1,091,624</b>	<b>\$21,079,381</b>	<b>\$1,091,623</b>	<b>\$1,117,523</b>	<b>\$1,091,623</b>	<b>\$1,091,623</b>	<b>\$1,091,623</b>	<b>\$1,091,623</b>	<b>\$36,667,881</b>



Expenses:											
Capitalized Activities	\$664,241	\$826,393	\$836,724	\$847,366	\$858,327	\$869,617	\$881,245	\$893,223	\$905,559	\$918,266	\$8,500,961
Bus Replacements	-	\$6,120,000	\$336,600	\$20,183,760	\$17,170,345	-	\$5,928,914	\$2,353,679	\$6,892,114	\$5,272,467	\$64,557,880
MLK, Downtown Miner BRT Expansion	-	-	-	\$15,188,776	-	-	-	-	-	-	\$15,188,776
Bus Operations Technology	-	\$1,770,000	-	-	-	-	-	-	-	-	\$1,770,000
Information Technology	\$350,000	\$350,000	\$353,500	\$357,035	\$360,605	\$364,211	\$367,854	\$371,532	\$375,247	\$379,000	\$3,628,985
Facility & Maintenance Equipment	\$179,849	\$167,500	\$172,525	\$177,701	\$183,032	\$188,523	\$194,178	\$200,004	\$206,004	\$212,184	\$1,881,499
Safety and Security	\$128,233	\$80,698	\$1,215,697	\$220,707	\$225,816	\$231,026	\$236,340	\$241,759	\$247,285	\$252,921	\$3,080,482
Passenger Stations and Amenities	-	\$521,625	-	\$969,200	-	\$32,375	-	-	-	-	\$1,523,200
BRT Expansion (Desired Service Expansion)	-	-	-	-	\$19,858,375	\$10,227,063	-	\$10,849,891	-	-	\$40,935,330
<b>Subtotal</b>	<b>\$1,322,323</b>	<b>\$9,836,216</b>	<b>\$2,915,046</b>	<b>\$37,944,545</b>	<b>\$38,656,501</b>	<b>\$11,912,816</b>	<b>\$7,608,531</b>	<b>\$14,910,088</b>	<b>\$8,626,209</b>	<b>\$7,034,838</b>	<b>\$140,767,112</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>\$0</b>	<b>(\$3,237,300)</b>	<b>(\$1,823,423)</b>	<b>(\$16,865,164)</b>	<b>(\$37,564,878)</b>	<b>(\$10,795,293)</b>	<b>(\$6,516,908)</b>	<b>(\$13,818,465)</b>	<b>(\$7,534,586)</b>	<b>(\$5,943,215)</b>	<b>(\$104,099,231)</b>



Figure 7: Financial Summary for Transit Operations

	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
Passenger Fares	\$4,533,924	\$4,350,891	\$4,285,531	\$5,376,045	\$5,313,591	\$5,393,295	\$5,573,643	\$5,677,042	\$5,786,266	\$5,897,129	\$52,187,357
Special Transit Fares	\$241,068	\$156,843	\$145,262	\$146,715	\$148,182	\$149,663	\$151,160	\$152,672	\$154,199	\$155,741	\$1,601,504
Auxiliary Trans Revenue	\$90,000	\$90,000	\$84,500	\$85,345	\$86,198	\$87,060	\$87,931	\$88,810	\$89,698	\$90,595	\$880,139
Non Transportation	\$59,680	\$59,680	\$65,219	\$65,871	\$66,530	\$67,195	\$67,867	\$68,546	\$69,231	\$69,924	\$659,743
Local Property Tax Revenue	\$786,730	\$834,894	\$866,184	\$874,846	\$883,594	\$892,430	\$901,355	\$910,368	\$919,472	\$928,666	\$8,798,539
Measure K	\$4,837,975	\$5,050,023	\$4,946,318	\$5,050,023	\$5,050,023	\$5,050,023	\$5,050,023	\$5,050,023	\$5,050,023	\$5,050,023	\$50,184,477
TDA-STA Revenues	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000	\$3,000,000	\$30,000,000
LCTOP (State)	-	\$221,773	\$221,773	\$806,209	\$806,209	\$806,209	\$806,209	\$806,209	\$806,209	\$806,209	\$6,087,009
TDA-LTF Revenues	\$12,937,330	\$13,525,160	\$14,706,057	\$15,147,239	\$15,601,656	\$15,601,656	\$16,069,706	\$16,069,706	\$16,551,797	\$16,551,797	\$152,762,102
Federal 5311	\$444,000	\$452,597	\$379,079	\$379,079	\$379,079	\$379,079	\$379,079	\$379,079	\$379,079	\$379,079	\$3,929,229
Federal 5307-Prev Maint	\$4,378,621	\$4,556,147	\$4,675,445	\$4,556,147	\$4,556,147	\$4,556,147	\$4,556,147	\$4,556,147	\$4,556,147	\$4,556,147	\$45,503,242
Federal 5307 - CMAQ - BRTIII	\$150,000	-	-	-	-	-	-	-	-	-	\$150,000
Federal 5316 - JARC BRT III	\$286,504	-	-	-	-	-	-	-	-	-	\$286,504
Federal 5316 - JARC Rural	\$117,000	-	-	-	-	-	-	-	-	-	\$117,000
Federal 5317	-	\$133,497	-	-	-	-	-	-	-	-	\$133,497
<b>Subtotal</b>	<b>\$31,862,831</b>	<b>\$32,431,505</b>	<b>\$33,375,368</b>	<b>\$35,487,519</b>	<b>\$35,891,209</b>	<b>\$35,982,758</b>	<b>\$36,643,120</b>	<b>\$36,758,602</b>	<b>\$37,362,121</b>	<b>\$37,485,310</b>	<b>\$353,280,342</b>



<b>Expenses:</b>											
Wages	\$9,291,345	\$10,389,872	\$10,310,947	\$11,518,069	\$11,864,210	\$12,220,417	\$12,584,624	\$12,965,487	\$13,354,834	\$13,755,815	\$118,255,619
Fringe Benefits	\$7,886,454	\$8,155,717	\$8,714,219	\$9,785,831	\$10,231,040	\$10,699,845	\$11,192,002	\$11,714,794	\$12,263,907	\$12,842,984	\$103,486,794
Services	\$2,935,981	\$2,507,853	\$2,629,144	\$2,753,563	\$2,763,211	\$2,769,900	\$2,774,500	\$2,787,077	\$2,797,397	\$2,804,981	\$27,523,608
Materials & Supplies	\$3,543,889	\$3,043,956	\$2,830,416	\$3,117,115	\$3,150,356	\$3,215,791	\$3,120,626	\$3,257,551	\$3,328,174	\$3,396,660	\$32,004,534
Utilities	\$652,564	\$550,550	\$729,330	\$739,881	\$747,345	\$754,885	\$762,503	\$770,200	\$777,975	\$785,830	\$7,271,064
Insurance	\$991,317	\$944,996	\$806,879	\$817,965	\$830,234	\$842,688	\$855,328	\$868,158	\$881,180	\$894,398	\$8,733,142
Taxes & Licenses	\$265,256	\$131,082	\$190,051	\$220,244	\$224,098	\$228,037	\$232,063	\$236,178	\$240,384	\$244,683	\$2,212,078
Purchased Transportation	\$6,678,959	\$6,997,154	\$7,073,500	\$7,413,522	\$7,731,395	\$8,018,039	\$7,944,491	\$8,657,853	\$8,988,500	\$9,323,501	\$78,826,913
Miscellaneous Expenditures	\$803,393	\$761,163	\$718,064	\$726,615	\$733,912	\$741,277	\$748,716	\$756,245	\$763,836	\$771,504	\$7,524,725
Interest	\$50,000	\$579,360	\$560,000	\$530,400	\$523,200	\$516,000	\$508,800	\$468,900	\$429,000	\$389,100	\$4,554,760
Lease	\$137,953	\$105,678	\$67,431	\$68,780	\$70,155	\$71,558	\$72,989	\$74,449	\$75,938	\$77,457	\$822,389
<b>Subtotal</b>	<b>\$33,237,111</b>	<b>\$34,167,381</b>	<b>\$34,629,981</b>	<b>\$37,691,983</b>	<b>\$38,869,157</b>	<b>\$40,078,437</b>	<b>\$40,796,642</b>	<b>\$42,556,892</b>	<b>\$43,901,127</b>	<b>\$45,286,914</b>	<b>\$391,215,625</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>(\$1,374,280)</b>	<b>(\$1,735,876)</b>	<b>(\$1,254,613)</b>	<b>(\$2,204,464)</b>	<b>(\$2,977,948)</b>	<b>(\$4,095,680)</b>	<b>(\$4,153,522)</b>	<b>(\$5,798,290)</b>	<b>(\$6,539,005)</b>	<b>(\$7,801,604)</b>	<b>(\$37,935,283)</b>



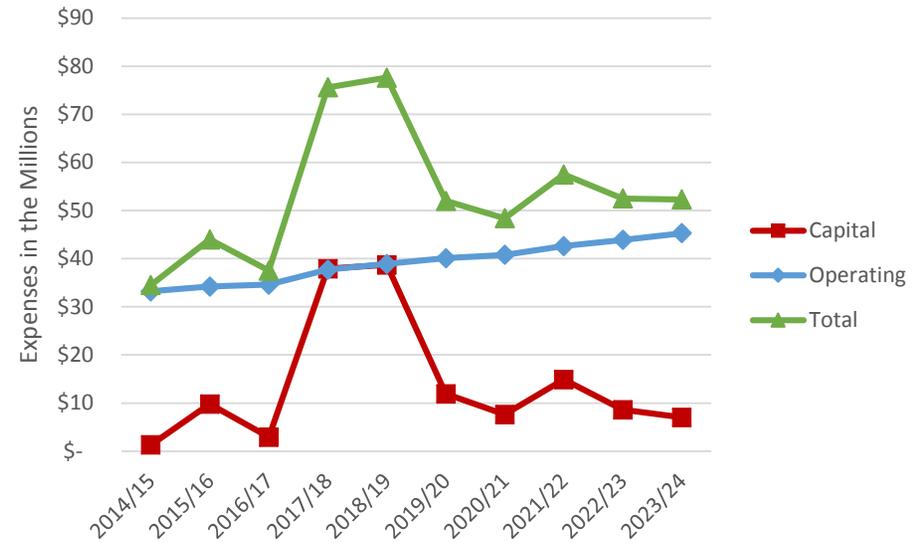
Capital costs range from as low as \$1.3 million in FY 2014/15 to as high as \$38.7 million in FY 18/19, when BRT expansion is expected. As expected operating costs increase every year, with the biggest increase occurring in FY 17/18, largely associated with increases in wages and fringe benefits.

Based on the information in Figures 6 and 7, both the costs associated with planned capital projects and with transit operations would exceed their anticipated funding amount over the next ten year period. As such, the RTD anticipates a funding shortfall of as much as \$142 million over the next ten years.

It should be noted that this 10 year capital and operating plan does not reflect RTD's full vision of service optimization and expansion during this time period due to funding shortfalls. Additional unfunded capital needs total over \$104 million. Over 29% of this (\$40.9 million) would be attributed to the capital costs of additional BRT corridors on West Lane, Arch/Sperry, and Eight Mile Road. Other needs include expansion of Hopper service to offset increasing costs of providing conventional Dial-A-Ride service, replacement of buses and non-revenue vehicles, facility and equipment improvements, and passenger amenities. Additional operational costs due to these changes would result in an unfunded need of over \$37.9 million.

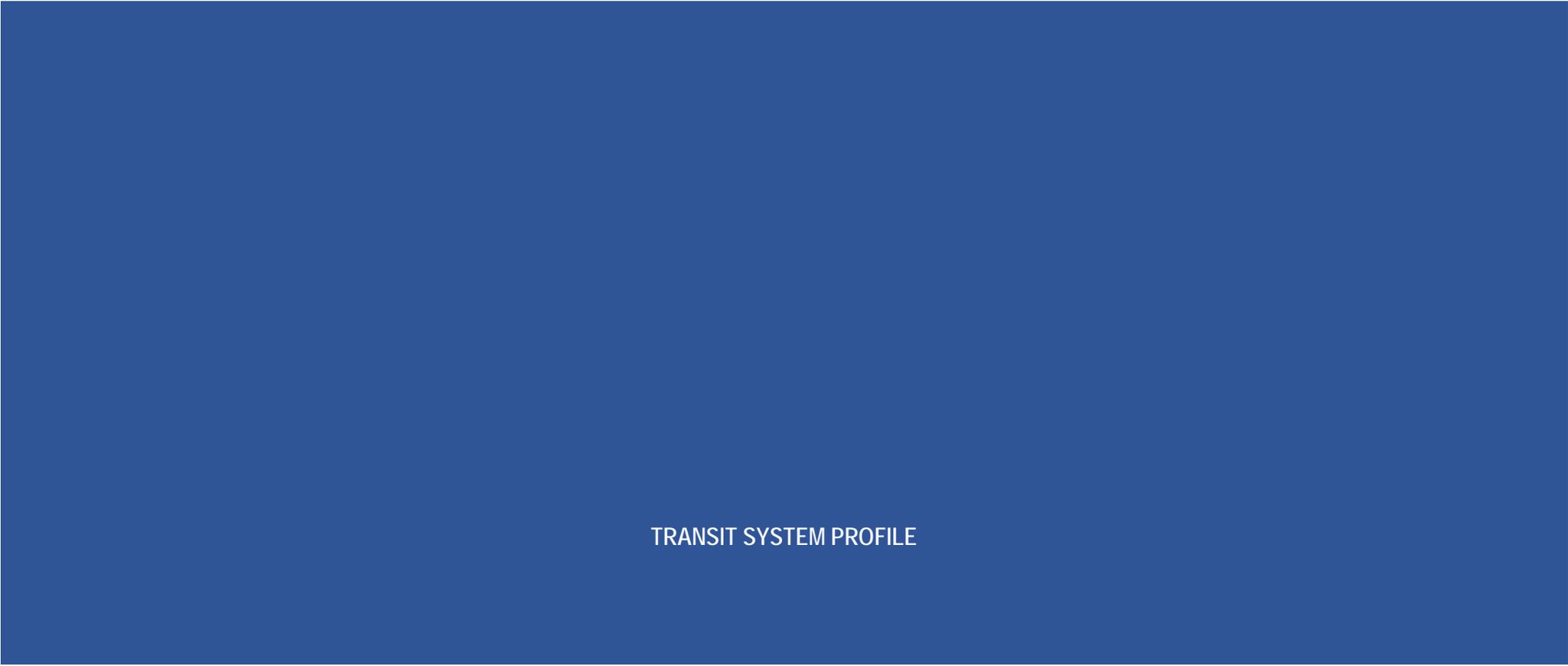
Many of these unfunded capital needs may be funded in the future through competitive state and federal funding from sources including but not limited to the state Transit and Intercity Rail Capital Program, the federal CMAQ program, the federal 5309 New Starts/Small Starts program, or the federal TIGER grant program.

Figure 8: Transit Operating and Capital Expenses





### **3 SAN JOAQUIN REGIONAL RAIL COMMISSION – ALTAMONT CORRIDOR EXPRESS**



TRANSIT SYSTEM PROFILE



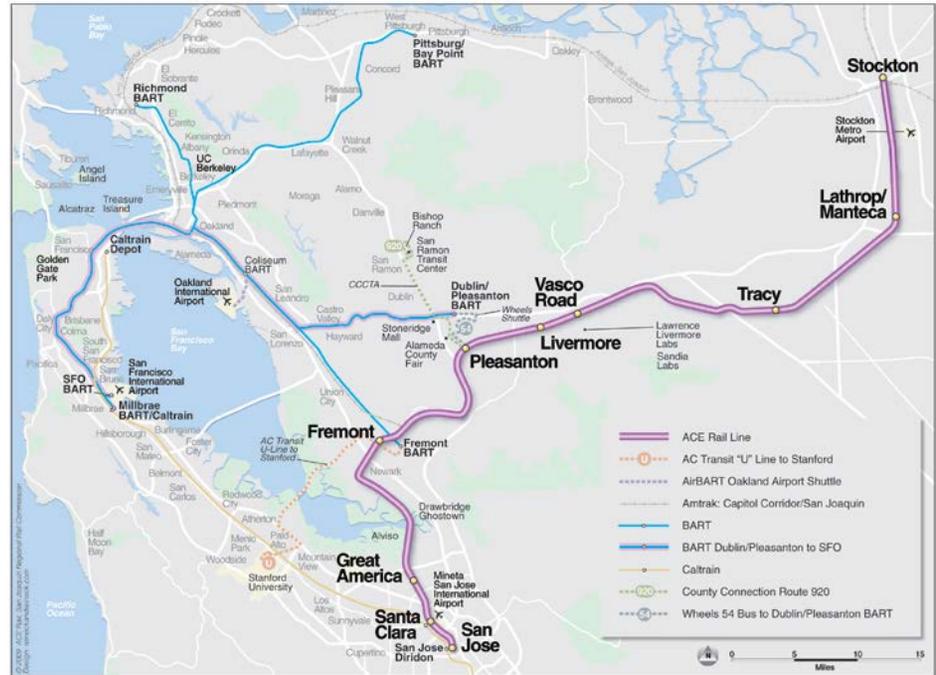
## SAN JOAQUIN REGIONAL RAIL COMMISSION – ALTAMONT CORRIDOR EXPRESS

The Altamont Corridor Express (ACE) serves three counties in Northern California—San Joaquin, Alameda, and Santa Clara—with a total service area population of about 4 million, with the expectation that this population may grow by as much as 900,000 by 2025. Systemwide ridership in Fiscal Year 2015/16 was nearly 1.3 million one-way passenger-trips.

### Transit System at a Glance

The Altamont Corridor Express (ACE) provides regional rail service between Stockton in San Joaquin County and San Jose in Santa Clara County. A cooperative service agreement among the San Joaquin Regional Rail Commission, Alameda County Transportation Commission, and Santa Clara Valley Transportation Authority directs ACE service. ACE provides 8 scheduled trips per day five days a week (weekdays) with four morning trips departing Stockton between 4:20am and 7:05am and 4 evening trips departing San Jose from 3:35pm to 6:38pm. ACE estimates that approximately 60% of passengers then transfer to local services to arrive at their final destinations. Four trainsets deliver this service, covering over 914,000 revenue miles each year. Fares are allocated within sub areas, ranging from \$4.00 each-way for trips within the Tri-Valley Area and up to \$13.75 each-way end-to-end. Discounted fares are available to seniors, disabled riders, and children 6-12. Children under 6 ride free when accompanied by a paying adult. Most ACE riders are frequent users who take advantage of multi-ride discounts (20-Trip Tickets or Monthly Passes).

Figure 1: ACE System Map



Along the 86-mile ACE route with 10 stations, trains stop at three stations serving San Joaquin County: Stockton, Lathrop/Manteca, and Tracy before continuing to Alameda County and terminating in Santa Clara County. Service began with two daily round trips in 1998, with a third trainset added in 2001. A fourth daily round trip was temporarily added in 2006 during the construction to widen I-205 through Tracy, and began regular service in 2012. The ongoing economic recovery in the Bay Area along with the addition of the fourth daily round trip has led to steady growth in ridership, particularly as new job centers emerge in the East Bay and Santa Clara County. In recent years ACE has worked to improve travel times and on-time performance and enhance passenger comfort through

- Onboard GPS and communications equipment
- New platform communication technology
- Real-time information for web and mobile devices
- New interfaces of the above for operations monitoring
- Signal upgrades from Stockton to Fremont to support implementation of positive train control in the coming years.

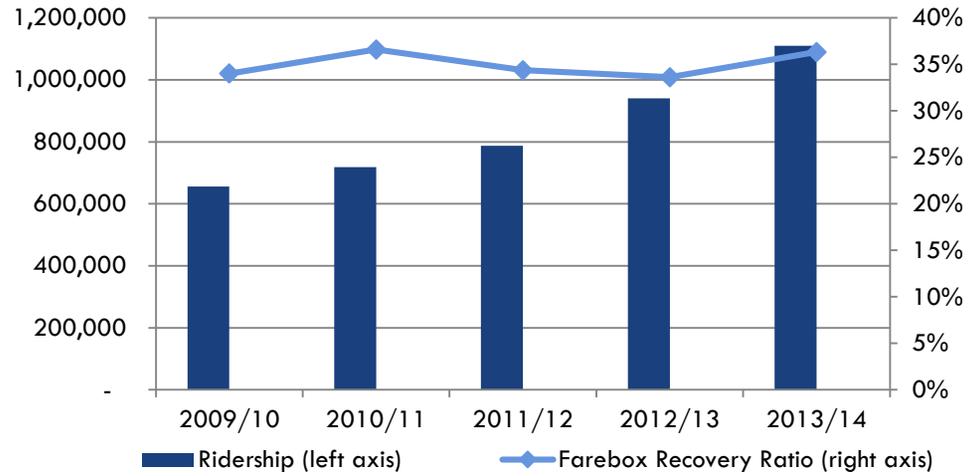
ACE also offers Wi-Fi, an Emergency Ride Home Program, and space on railcars for roll-on bicycle access and bicycle lockers at stations. In the coming years, ACE service will expand to respond to increasing demand for travel to jobs in the Bay Area and to provide a link with high speed rail as it is implemented. Future activities are described in more detail below.



## Performance Measures

Figures 2 and 3 to the right illustrate ridership and farebox recovery ratio and farebox revenue. Figure 4 provides a year-by-year summary of performance.

**Figure 2: Ridership and Farebox Recovery Ratio**



**Figure 3: Ridership and Farebox Receipts**

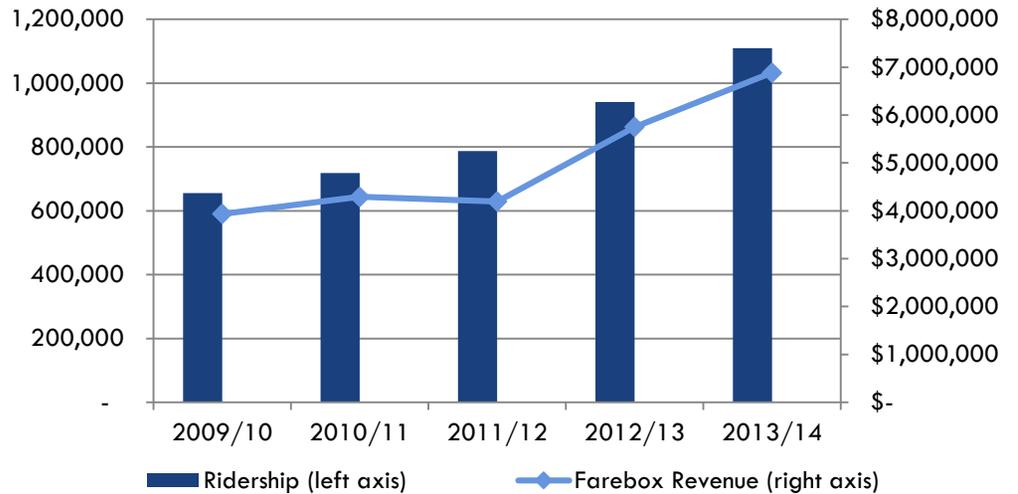




Figure 4 Performance Measures for ACE Operations

Service Type	Fiscal Year	Ridership	Revenue Hours	Revenue Miles	Operating Cost	Operating Cost per Revenue Hr	Operating Cost per Passenger	Farebox Recovery Ratio	Passengers per Revenue Hr	Passengers per Revenue Mile	Subsidy per Passenger
Rail Service	2009/10	655,452	18,648	718,956	\$ 11,572,917	\$ 620.60	\$ 17.66	34.0%	35.1	0.9	\$ 11.65
	2010/11	718,356	19,656	786,034	\$ 11,732,070	\$ 596.87	\$ 16.33	36.6%	36.5	0.9	\$ 10.36
	2011/12	786,947	20,194	805,248	\$ 12,206,566	\$ 604.46	\$ 15.51	34.4%	39.0	1.0	\$ 10.18
	2012/13	940,774	23,283	914,658	\$ 17,113,139	\$ 735.01	\$ 18.19	33.6%	40.4	1.0	\$ 12.07
	2013/14	1,109,774	24,947	946,028	\$ 18,954,433	\$ 759.79	\$ 17.08	36.3%	44.5	1.2	\$ 10.88

During the recent five-year period, many transit agencies were challenged by economic conditions during the recession, affecting ridership, costs, and/or funding. Whether due to ACE's larger ridership baseline or its measured approach to expansion, the agency's performance metrics show minor fluctuations over the past 5 years relative to other agencies. ACE managed to gain increased ridership each year, and further shows a steady increase in Passengers per Revenue Hour and Per Mile. In 2012 the fourth roundtrip returned to service, leading to a 20% increase in ridership in FY 2012/13, nearly double that the growth rate of previous years. Ridership for FY 2013/14 was 1,109,774 passenger trips. The cost of adding this service was substantial, and led to corresponding increases in Cost per Passenger in FY 2012/13; however in the following year this figure decreased as ridership increased. The Farebox Recovery Ratio is also increasing, once again climbing above 36% in FY 2013/14, far higher than the 20% recovery ratio typically applied to agencies in urban settings.

### Anticipated Funding Picture

The San Joaquin Regional Rail Commission receives funding from local, state, regional and federal sources for transit purposes. In addition, cooperative agreements among the three counties specify an amount that each county will contribute to capital and operating activities each year. Specifically, ACE makes use of the funding sources listed in Figure 5 below.

Over the next ten years ACE passenger service is expected to begin operating at higher average speeds and frequency. This decision requires infrastructure upgrades and enhancements to improve flexibility, operations control, and operational safety that must accompany this shift. The full complement of the improvements will lead to faster travel times, greater passenger comfort, and better overall performance. In addition, the corridor will experience far fewer delays, many of which are the result interruptions and restrictions associated with sharing track with freight service. Much of the activity in the coming years is based on preparing for or delivering 2 more round trips by FY 2018/19. Based on a combination of data provided ACE SRTP and information provided by ACE staff, funding assumptions for foreseeable capital projects and related operating costs, the costs associated with the continued operation of existing services, and anticipated revenue available to fund these projects and operations are summarized in Figures 6 and 7. Details related to specific planned expenditures are described below:

Figure 5 Transit Funding Sources

Local Funds & Fare Revenue	Regional & State Funds	Federal Funds
Passenger Fares	Measure K	FTA 5307
Annual Local Transportation Funds Operating Revenues (collected locally and redistributed by state)	Proposition 1B – TSSSDRA	Homeland Security
Santa Clara and Alameda County	Proposition 1A	
Transportation Fund for Clean Air (TFCA)	Measures B & BB	



- **Fleet Expansion** – ACE is scheduled to add a 5<sup>th</sup> trainset at the beginning of FY 19/20 and 6<sup>th</sup> trainset at the beginning of FY 22/23 at a capital cost of \$60,500,000.
- **Track Improvements** – Track improvements to support safe, efficient operations of the new higher average speed service and the additional round trips. Over time this represents an investment of \$39,000,000 for basic track improvements (capitalized maintenance), \$15 million for Stockton Track Extension Project, and \$60,400,000 associated with the 5<sup>th</sup> and 6<sup>th</sup> round trips.
- **Station and Platform Improvements** – \$18,000,000 for parking improvements and platform extensions.
- **Positive Train Control** – ongoing activities will total \$12,650,000 over the 10-year period, with an additional \$525,000 when the 5<sup>th</sup> and 6<sup>th</sup> roundtrips go into service.
- **Trackage Rights Fees** – ongoing fees for trackage rights begin at a base of \$3,300,000 annually then increase to \$4,950,000 as new roundtrips come online. These fees will total \$38,775,000 over the 10-year period.
- **High Speed Rail Project Development** – ongoing environmental, design, and engineering activities to advance high speed rail coordination in this corridor will exceed \$30,000,000 during the plan period.



Figure 6: Financial Summary for Transit Capital Projects

Capital Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
FTA 5307	2,104,410	2,130,776	2,173,670	2,219,617	2,266,973	2,315,332	2,384,792	2,456,336	2,530,026	2,605,927	23,187,859
FTA 5337 - SJCOG	3,255,766	3,713,499	3,776,777	3,842,006	3,908,180	3,975,468	4,094,732	4,217,574	4,344,101	4,474,424	39,602,527
FTA 5337 - MTC	1,240,810	1,387,000	1,428,610	1,471,468	1,515,612	1,561,081	1,607,913	1,656,151	1,705,835	1,757,010	15,331,490
CMAQ		1,500,000			3,500,000			3,500,000			8,500,000
Prop 1B - CTSGP	1,167,148	1,167,148	1,167,148								3,501,444
TSSSDRA - SJCOG	18,463	193,510	193,511								405,484
TSSSDRA - ACTC	38,826	38,826	38,826								116,478
TSSSDRA - SCVTA	54,181	54,181	54,181								162,543
LCTOP - SJCOG		45,086	46,439	47,832	49,267	50,745	52,267	53,835	55,450	57,114	458,035
LCTOP - ACTC		52,342	53,912	55,530	57,196	58,911	60,679	62,499	64,374	66,305	531,748
TIRCP/State		200,000		25,000,000	30,000,000		40,000,000				95,200,000
Prop 1A	1,307,000	12,729,325	9,840,000	14,154,675	3,400,000		4,000,000				45,431,000
IRS Rebate	885,496	885,000	885,000	885,000	885,000	885,000	885,000	885,000	885,000	885,000	8,850,496
FEMA TSGP		435,122		200,000		200,000		200,000		200,000	1,235,122
ACTC Baseline	416,620	3,773,836	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	2,000,000	20,190,456
Measure K		170,000	170,000	170,000	200,000	200,000	200,000	30,000	200,000	200,000	1,540,000
Homeland Security		50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	450,000
<b>Subtotal</b>	<b>10,488,720</b>	<b>28,525,651</b>	<b>21,878,074</b>	<b>50,096,128</b>	<b>47,832,228</b>	<b>11,296,537</b>	<b>55,335,383</b>	<b>15,111,395</b>	<b>11,834,786</b>	<b>12,295,780</b>	<b>264,694,682</b>



**Figure 6: Financial Summary for Transit Capital Projects (continued)**

Capital Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Expenses:</b>											
Debt repayment	1,900,000	0	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	9,900,000
Equipment -- 5th & 6th Trainsets				12,100,000	12,100,000	12,100,000	12,100,000	12,100,000			60,500,000
Station Facilities				1,000,000	3,400,000	1,000,000	6,300,000	6,300,000			18,000,000
Trackage Right Fee	3,300,000	3,300,000	3,300,000	3,300,000	3,300,000	4,125,000	4,125,000	4,125,000	4,950,000	4,950,000	38,775,000
Planning		300,000									300,000
Planning - Altamont Corr HSR Proj Dvt	1,307,000	7,410,000	9,840,000	8,500,000	3,400,000						30,457,000
Pos Train Control	5,000,000	850,000	850,000	850,000	850,000	850,000	850,000	850,000	850,000	850,000	12,650,000
Pos Train Control - 5th & 6th Trainsets						75,000	75,000	75,000	150,000	150,000	525,000
Capital Spares	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	1,000,000	10,000,000
Stockton Track Ext.				5,000,000	10,000,000						15,000,000
Safety & Security Track	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	500,000
Improvements (Cap. Maint.) Track			4,000,000	4,000,000	4,000,000	5,000,000	5,000,000	5,000,000	6,000,000	6,000,000	39,000,000
Improvements - 5th & 6th Trainsets				10,066,000	10,067,000	10,066,000	10,067,000	10,067,000	10,067,000		60,400,000
<b>Grand Total</b>	<b>12,557,000</b>	<b>12,910,000</b>	<b>20,040,000</b>	<b>46,866,000</b>	<b>49,167,000</b>	<b>35,266,000</b>	<b>40,567,000</b>	<b>40,567,000</b>	<b>24,067,000</b>	<b>14,000,000</b>	<b>296,007,000</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>(2,068,280)</b>	<b>15,615,651</b>	<b>1,838,074</b>	<b>3,230,128</b>	<b>(1,334,772)</b>	<b>(23,969,463)</b>	<b>14,768,383</b>	<b>(25,455,605)</b>	<b>(12,232,214)</b>	<b>(1,704,220)</b>	<b>(31,312,318)</b>



Figure 7: Financial Summary for Transit Operations

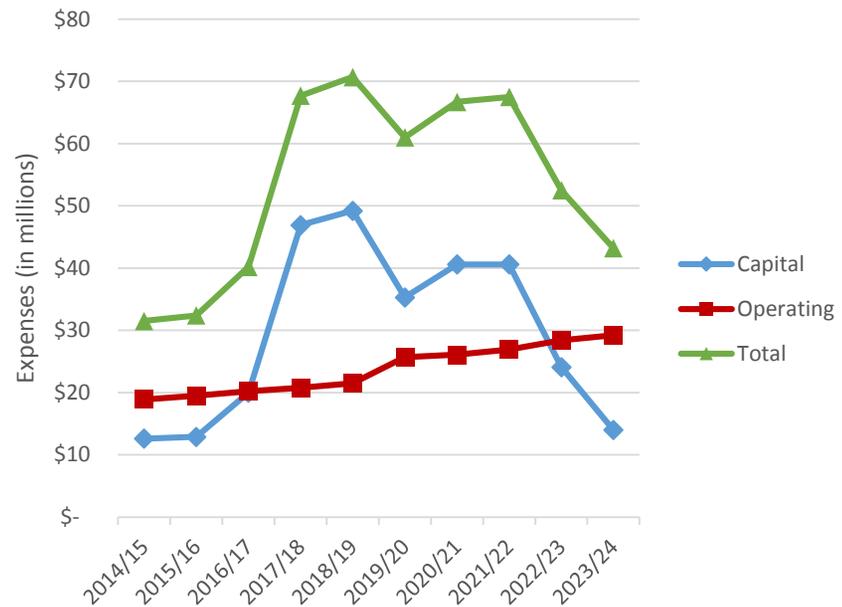
Operations	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
ACE Fares	7,990,764	8,395,000	9,271,000	9,737,000	10,738,000	11,279,000	12,441,000	13,062,000	14,393,000	15,110,000	112,416,764
Measure K	5,274,512	5,506,670	5,748,599	5,990,000	6,242,000	6,504,000	6,777,000	7,062,000	7,359,000	7,668,000	64,131,781
ACTC Baseline	2,883,757	2,911,000	3,002,697	3,093,000	3,186,000	3,282,000	3,380,000	3,481,000	3,585,000	3,693,000	32,497,454
SCVTA Baseline	3,064,646	3,125,632	3,224,089	3,321,000	3,421,000	3,524,000	3,630,000	3,739,000	3,851,000	3,967,000	34,867,367
LTF	700,000	1,300,000	2,200,000	3,100,000	3,100,000	3,100,000	3,100,000	3,100,000	3,100,000	3,100,000	25,900,000
STA - SJCOG	591,390	602,908	362,000	373,000	384,000	396,000	408,000	420,000	433,000	446,000	4,416,298
STA - MTC	292,998	295,000	177,000	182,000	187,000	193,000	199,000	205,000	211,000	217,000	2,158,998
BAAQMD TFCA	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	600,000
<b>Total</b>	<b>20,858,067</b>	<b>22,196,210</b>	<b>24,045,385</b>	<b>25,856,000</b>	<b>27,318,000</b>	<b>28,338,000</b>	<b>29,995,000</b>	<b>31,129,000</b>	<b>32,992,000</b>	<b>34,261,000</b>	<b>276,988,662</b>
<b>Expenses:</b>											
Operating Costs -- Baseline SJRRC	1,130,000	1,150,000	1,170,000	1,180,000	1,200,000	1,220,000	1,256,600	1,294,300	1,333,200	1,373,200	12,307,300
Operating Costs -- Baseline ACE	16,700,000	17,290,000	17,890,000	18,520,000	19,170,000	19,450,000	19,690,000	20,280,700	20,889,200	21,515,900	191,395,800
Maintenance Costs -- Baseline	1,040,000	1,071,200	1,103,400	1,136,600	1,170,700	1,205,900	1,242,000	1,279,400	1,317,800	1,357,400	11,924,400
Maintenance Costs -- 5th & 6th Trainsets						1,326,000	1,366,000	1,407,000	1,800,000	1,854,000	7,753,000
Shuttle Operations at SJC Stns						1,123,000	1,156,700	1,191,500	1,227,300	1,264,200	5,962,700
Operating Costs -- 5th & 6th Trainsets						1,326,000	1,366,000	1,407,000	1,800,000	1,854,000	7,753,000
<b>Subtotal</b>	<b>18,870,000</b>	<b>19,511,200</b>	<b>20,163,400</b>	<b>20,836,600</b>	<b>21,540,700</b>	<b>25,650,900</b>	<b>26,077,300</b>	<b>26,859,900</b>	<b>28,367,500</b>	<b>29,218,700</b>	<b>237,096,200</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>1,988,067</b>	<b>2,685,010</b>	<b>3,881,985</b>	<b>5,019,400</b>	<b>5,777,300</b>	<b>2,687,100</b>	<b>3,917,700</b>	<b>4,269,100</b>	<b>4,624,500</b>	<b>5,042,300</b>	<b>39,892,462</b>



SJRRC incurred approximately \$19M in Fiscal Year 2014/15 operating and maintaining existing baseline service to the 10 stations in the 3 counties it serves. These expenses are expected to increase at a rate of 3% each year, growing to over \$29M by the end of the 10-year period. Operating and maintenance costs show sustained increases as new services come online to serve increased frequencies as the new trainsets become available. Capital expenditures follow a similar pattern, with substantial expenditures in FY 2017/18-2022/23 for the 5<sup>th</sup> and 6<sup>th</sup> round trips.

Over the 10-year RTSP period, SJRRC projects the funding necessary to implement capacity improvements and to operate the additional 5<sup>th</sup> and 6<sup>th</sup> round trips. While the total shortfall for capital projects during the plan period is shown to reach about \$31.3M, this would be offset by the \$39.9M operational surplus (which could be used for capital projects). It will be critical to ensure that these funds are realized as the projects progress for this improvement program to be implemented.

Figure 8: Transit Operating and Capital Expenses (Millions)



## 4 CITY OF ESCALON - ETRANS

TRANSIT SYSTEM PROFILE



## CITY OF ESCALON - ETRANS

Escalon is among the smallest of cities within San Joaquin County, with a population of 7,254. Median household income was \$53,846 in 2013, nearly on par with the county (\$51,432). Of the citywide population, 13.2% were low-income, 12.5% were elderly, 27.1% were youths, and 3.0% did not have access to a private vehicle<sup>1</sup>. These segments of the population tend to be most dependent on transit service. Systemwide ridership in FY 2013/14 on all eTrans services was 3,325 one-way passenger-trips, an increase of 5.8 percent over Fiscal Year 2012/13.

The City updated its Short Range Transit Plan in 2012 and plans are underway to implement service changes to maintain its transit footprint in the community and best serve the transportation needs of city residents. Both the City's General Plan and the Short Range Transit Plan outline a vision for Escalon that includes comprehensive transit service where residents and visitors are afforded basic mobility and a useful alternative to travel by motor vehicle.

### Transit System at a Glance

Transit service has been provided in Escalon for many years, but the current form of Escalon's proprietary bus system was dubbed "eTrans" in 2008. eTrans offers door-to-door dial-a-ride service within the City of Escalon and provides a connection to Riverbank. Route 1, eTrans' sole intercity route, operates as a deviated-route service between the Downtown Escalon Park and Ride Lot and Northwest Modesto. eTrans connects to Modesto Area Express (MAX), Modesto Area Dial-A-Ride, RTD Rural General Public Dial-A-Ride and Ripon Blossom Express. eTrans services are funded with State Transportation Development Act (TDA), Measure K and Federal Transit Administration Section 5311 funds. All transit services offered by eTrans are open and available to the general public. Services are operated by contractual agreement, and managed by City staff.

Basic fares are \$1.50 for local dial-a-ride and \$3.00 for intercity, with a \$1.00 surcharge for route deviations up to ¼ mile; 31-day passes are \$65 (local) and \$75 (intercity) with discounts of approximately 50% for seniors and modest discounts for students. Stanislaus Regional Transit (StaRT) accepts eTrans purple transfers for connections to StaRT's Riverbank Dial-A-Ride at Jacob Myers Park or Route 60 along McHenry Avenue in Modesto.

As of July 13, 2015, eTrans operates fixed-route service from 8:12 a.m. to 5:12 p.m. between Escalon and Modesto. Dial-A-Ride operates from 9:12 a.m. to 11:32 a.m., 12:32 p.m. to 1:12 p.m. and 2:12 p.m. to 3:32 p.m.

Figure 1 Service Area – eTrans



Data Sources: SJCOC, San Joaquin County, Nelson\Nygaard

<sup>1</sup> American Community Survey, 2013, US Census Bureau.



## Performance Measures

The following section describes a set of performance measures for eTrans, with more detail on measures in a separate chapter. Farebox Revenue and Subsidy per Passenger are shown in Figures 2 and 3 respectively with a year-by-year summary of other metrics in Figure 4.

Figure 2: Ridership and Subsidy per Passenger – eTrans

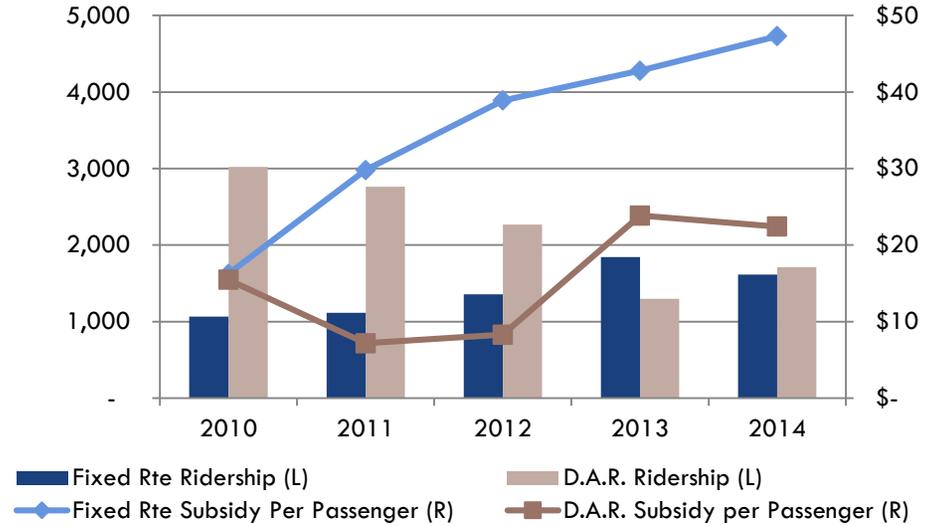


Figure 3: Ridership and Farebox Revenue – eTrans

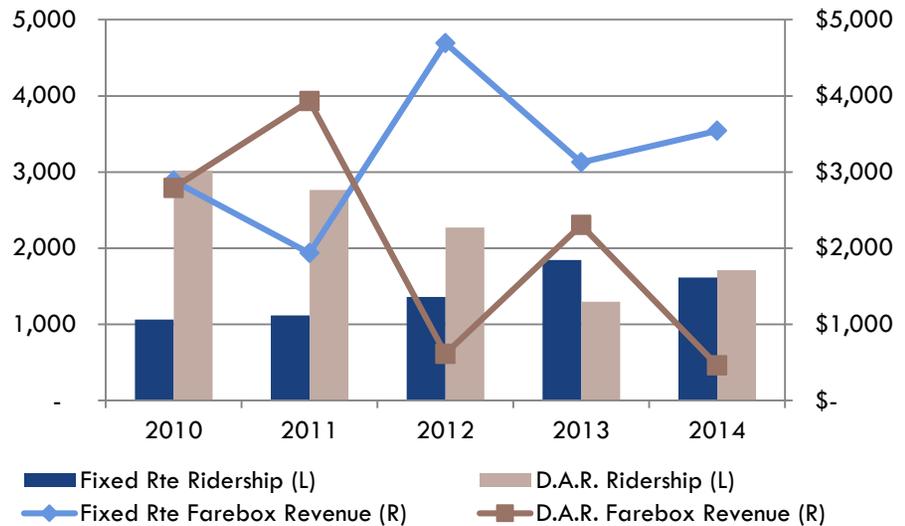




Figure 4: Performance Measures for Transit Operations – Escalon Transit (eTrans)

Service Type	Fiscal Year	Ridership	Revenue Hours	Revenue Miles	Operating Cost per Revenue Hr	Operating Cost per Passenger	Farebox Recovery Ratio	Passengers per Revenue Hr	Passengers per Revenue Mile	Subsidy per Passenger
Deviated Fixed Route	2009/10	1,064	511	13,071	\$ 39.47	\$ 18.95	14.3%	2.1	0.1	16.2
	2010/11	1,116	569	13,127	\$ 61.89	\$ 31.54	5.5%	2.0	0.1	29.8
	2011/12	1,358	1,023	24,499	\$ 56.20	\$ 42.34	8.2%	1.3	0.1	38.9
	2012/13	1,844	1,642	37,242	\$ 49.97	\$ 44.48	3.8%	1.1	0.0	42.8
	2013/14	1,614	1,598	35,919	\$ 50.00	\$ 49.50	4.4%	1.0	0.0	47.3
Dial-a-Ride	2009/10	3,021	805	5,046	\$ 61.57	\$ 16.40	5.6%	3.8	0.6	15.5
	2010/11	2,763	318	3,226	\$ 74.73	\$ 8.60	16.5%	8.7	0.9	7.2
	2011/12	2,269	220	2,265	\$ 88.57	\$ 8.58	3.1%	10.3	1.0	8.3
	2012/13	1,298	665	3,174	\$ 50.00	\$ 25.62	6.9%	2.0	0.4	23.8
	2013/14	1,711	776	2,571	\$ 50.00	\$ 22.68	1.2%	2.2	0.7	22.4

A challenging aspect of performance measurement data in rural communities is that transit systems cover large geographic areas with small populations and less dense land uses, which results in comparatively lower ridership and performance metrics. Under Article 4 of the CA Transportation Development Act, claimants are required to maintain a specified ratio of fare revenue to operating cost. Ratio of fare revenues to operating costs at least equal to 20% if serving an urbanized area or 10% if serving a non-urbanized area, or to the ratio it had during the 1978-79 fiscal year, whichever is greater. However, if fares do not meet the applicable ratio, an operator can satisfy that requirement by supplementing its fare revenues with local funds. For contracted transportation service providers claiming funds through Article 8, the San Joaquin Council of Governments Executive Board has waived the farebox and local support ratios. In its place, no more than 90% of the total operating funds (minus depreciation) in the budget may be TDA derived. Additionally, no to receive TDA operating funds above what was claimed the previous fiscal year, the claimant must have met at least two of the three performance objectives at the end of the third year, in compliance with the previous three-year Transit Systems Performance Objective established by the COG Board. As a small transit provider, Escalon is not held to the 20% farebox recovery ratio required of larger transit operators in urbanized areas.

Between FY 09/10 and FY 13/14, Escalon's Transit system, eTrans total ridership has been gradually decreasing, beginning with system ridership just over 4,000 (Fixed Route and On-Demand) in FY 09/10 and falling to just over 3,000 in FY 12/13. This trend may be turning, however, as overall ridership increased to nearly 3,400 in FY 2013/14. While eTrans was able to meet the 10% farebox recovery ratio during 1 in 5 years during this time period, the fluctuations have been very wide for both types of service. Deviated Route ridership has increased over the past 5 years likely due to a combination of economic recovery and an increase in service hours. Note however, that ridership for Dial-A-Ride services has been declining during the same period..

### Anticipated Funding Picture

Escalon Transit receives funding from local, state, regional and federal sources. Specifically, eTrans makes use of the funding sources listed in Figure 6, below. It should be noted that a large portion of funding for eTrans comes via federal and state programs.



Over the next five years, eTrans to continue its bus replacement program, add front mounted bike racks, and make other miscellaneous repairs and replacements of small items. Based on data provided by City of Escalon staff, funding assumptions for foreseeable capital projects and related operating costs, the costs associated with the continued operation of existing services, and anticipated revenue available to fund these projects and operations are summarized in Figure 7 and 8. Details related to specific planned expenditures are described below:

- **Bus Replacement** – eTrans intends to purchase one minivan in FY 15/16 and one cutaway bus in FY 16/17.
- **Front Mounted Bike Racks** – purchase front mounted bike racks for the fleet in FY 16/17.
- **Repair, Replacement of Small Items** – In FY 19/20, eTrans anticipates making miscellaneous repairs and replacements of small items.

Figure 5: Transit Funding Sources – eTrans

Local Funds & Fare Revenue	Regional & State Funds	Federal Funds
Passenger Fares	Measure K	FTA 5304
Advertising	State Transit Assistance (STA)	FTA 5311
Annual Local Transportation Funds Operating Revenues (collected locally and redistributed by state)	Proposition 1B – PTMISEA & TSSSDRA	

Figure 6: Financial Summary for Transit Capital Projects – eTrans

Capital Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
Measure K	----	----	\$2,000	----	----	----	----	----	----	----	\$2,000
FTA 5311	----	----	----	----	----	\$1,600	----	----	----	----	\$1,600
Prop 1B – PTMISEA or TSSSDRA	----	\$100,000	\$65,000	----	----	----	----	----	----	----	\$165,000
Unspecified	----	----	----	----	----	----	\$400	----	----	----	\$400
<b>Subtotal</b>	----	\$100,000	\$67,000	\$0	\$0	\$1,600	\$400	\$0	\$0	\$0	\$169,000
<b>Expenses:</b>											
Bus Enhancements	----	----	\$2,000	----	----	----	----	----	----	----	\$2,000
Fleet Replacement	----	\$100,000	\$65,000	----	----	----	----	----	----	----	\$165,000
Maintenance Equipment	----	----	----	----	----	\$1,600	\$400	----	----	----	\$2,000
<b>Subtotal</b>	----	\$100,000	\$67,000	\$0	\$0	\$1,600	\$400	\$0	\$0	\$0	\$169,000
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Source: eTrans 2012-2022 Short Range Transit Plan



Figure 7: Financial Summary for Transit Operations – eTrans

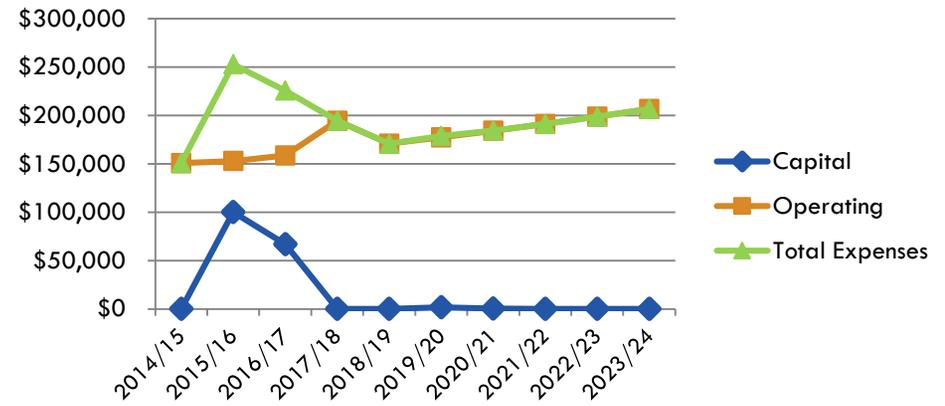
Transit Operations	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
Fare Revenue	\$5,600	\$5,300	\$5,406	\$5,514	\$5,624	\$5,737	\$5,852	\$5,969	\$6,088	\$6,210	\$57,300
Measure K	\$26,166	\$27,851	\$29,640	\$31,541	\$33,561	\$35,706	\$37,884	\$37,884	\$37,884	\$37,884	\$336,001
TDA - STA Revenue	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$50,000
TDA – LTF	\$70,789	\$64,186	\$66,454	\$68,830	\$71,312	\$73,907	\$76,724	\$81,989	\$87,543	\$93,404	\$755,138
Federal 5311	\$42,120	\$50,000	\$51,500	\$53,045	\$54,636	\$56,275	\$57,964	\$59,703	\$61,494	\$63,339	\$550,075
Federal 5304	----	----	----	\$30,000	----	----	----	----	----	----	\$30,000
Rental/Advertising	\$1,000	\$500	\$520	\$530	\$541	\$552	\$563	\$574	\$586	\$597	\$5,963
Local Carbon Transit Funds (Cap & Trade)	\$0	\$128	\$134	\$141	\$148	\$156	\$163	\$172	\$180	\$189	\$1,411
<b>Subtotal</b>	<b>\$150,675</b>	<b>\$152,965</b>	<b>\$158,654</b>	<b>\$194,602</b>	<b>\$170,823</b>	<b>\$177,333</b>	<b>\$184,150</b>	<b>\$191,290</b>	<b>\$198,775</b>	<b>\$206,623</b>	<b>\$1,785,889</b>
<b>Expenses:</b>											
Operating Costs	\$52,175	\$47,515	\$50,040	\$52,730	\$55,595	\$58,648	\$61,904	\$65,377	\$69,084	\$73,042	\$586,111
Purchased Transportation	\$98,500	\$105,450	\$108,614	\$111,872	\$115,228	\$118,685	\$122,245	\$125,913	\$129,690	\$133,581	\$1,169,778
Short Range Planning	----	----	----	\$30,000	----	----	----	----	----	----	\$30,000
<b>Subtotal</b>	<b>\$150,675</b>	<b>\$152,965</b>	<b>\$158,654</b>	<b>\$194,602</b>	<b>\$170,823</b>	<b>\$177,333</b>	<b>\$184,150</b>	<b>\$191,290</b>	<b>\$198,775</b>	<b>\$206,623</b>	<b>\$1,785,889</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>\$0</b>										

Source: eTrans 2012-2022 Short Range Transit Plan



As shown in Tables 5 and 6, capital costs range from as low as \$400 in FY 20/21 for maintenance supplies to as high as \$100,000 in FY 15/16 for fleet replacement, and operating costs range from as low as \$150,675 in FY 14/15 to as high as \$206,623 in FY 23/24. Based on the information provided in Tables 5 and 6, the costs associated with planned capital projects and transit operations for the City of Escalon would not exceed their anticipated funding amount over a ten year period. As such, the City of Escalon does not anticipate a funding shortfall or surplus with respect to transit funding. However, there may be a need to redesign the eTrans system due as the current operations model may not be sustainable due to a high subsidy.

Figure 8: Transit Operating and Capital Expenses – eTrans



## 5 CITY OF LODI - GRAPELINE

TRANSIT SYSTEM PROFILE

## CITY OF LODI - GRAPELINE

Lodi is a city nestled within San Joaquin County, in the northern area of California's Central Valley, well-known for its grape-growing industry and production economy. Lodi is located under 20 miles from the county seat of Stockton and nearly 40 miles from the state capitol, Sacramento, and served by a local Amtrak and Greyhound station in addition to local and regional transit services. Established as a city in 1906, the City of Lodi hosts a population just over 62,000; this represents a 9.1% growth over the last ten years, with more growth expected in the coming years. Median household income falls just over \$48,000, more than 20% lower than the statewide average of \$60,190 but only 7% lower than the San Joaquin County average of nearly \$51,500.

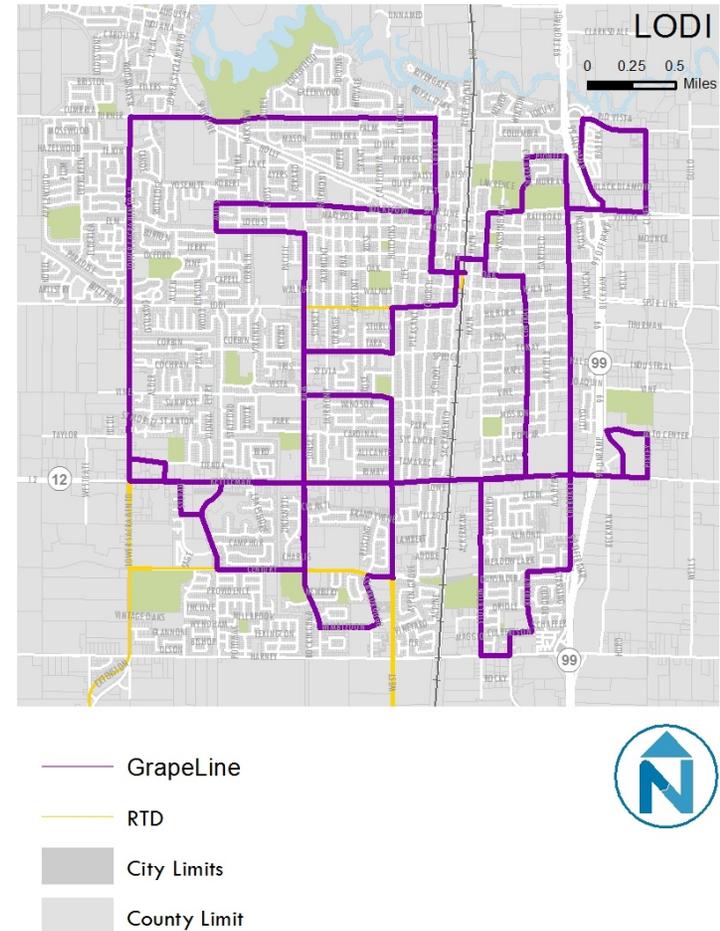
Transportation plays an integral role in the day-to-day experience of any city; like many other California cities, Lodi's vision includes providing residents and employees mobility options that do not solely rely on the private automobile. Of the current population, 14.7% are elderly, 15.7% are low-income, 16.7% are youths, and 6.5% do not own a private vehicle—all populations that tend to be most dependent on transit service. Recognizing the benefits to the environment, economic growth, and accessibility, Lodi offers transit service 7 days a week within its service area through the GrapeLine, which provides further connections to the broader regional system. Lodi's 2013 Short Range Transit Plan provides information on the current operating environment along with key achievements, opportunities, and constraints facing the transit agency as it serves the Lodi community.

### Transit System at a Glance

City of Lodi offers both fixed-route and demand-responsive transit services within the city via the GrapeLine. The GrapeLine also provides connection to the Rio Vista Delta Breeze, as well as regional connections to Stockton and other neighboring cities and unincorporated communities through RTD and South (Sacramento) County LINK services. Transit operations are provided through an annual contract for all services, while maintenance and overall administration is undertaken by the City of Lodi's Public Works Department.

Systemwide ridership in FY 2013/14 on all City of Lodi transit services was just under 245,000 passenger-trips, an increase of 17 percent since the low point experienced in FY 2010-11. Fixed route ridership, in particular increased 13.8% from FY 12/13 to FY 13/14 perhaps due in part to improvement in the regional economy recovered, however, this may be more related to the 17.8% increase in fixed route revenue hours that parallels the ridership increase. In FY13/14, 87% of ridership has been on the fixed route lines while 13% are served by demand-responsive services, with fixed-route representing 64% of revenue hours and 69% of revenue-miles.

Figure 1: Service Area – City of Lodi



Data Sources: SJCOC, San Joaquin County, Nelson\Nygaard



Existing local fixed-route services include five weekday routes that operate on a frequency of 60 minutes and less frequent weekend service. The GrapelLine also offers three express routes during the morning and afternoons, with 3-4 departures each in the morning and 2 each in the afternoon which connect various employment centers within Lodi. Figure 2 shows span of service by line. Over the past five years fixed-route ridership experienced a dip, but has been increasing since FY 2010/11. In FY 2013/14 fixed-route ridership peaked at an all-time high of 212,500 passenger trips. Ridership on Routes 1 and 2 together account for as much as 40% of system ridership. Express Route 7 was eliminated in 2014 due to low ridership, and operating budget reallocated to other lines within the system. The general fee for fixed-route service (including express) is \$1.25 per one-way trip, with discounted senior fares costing \$0.60 per one-way trip.

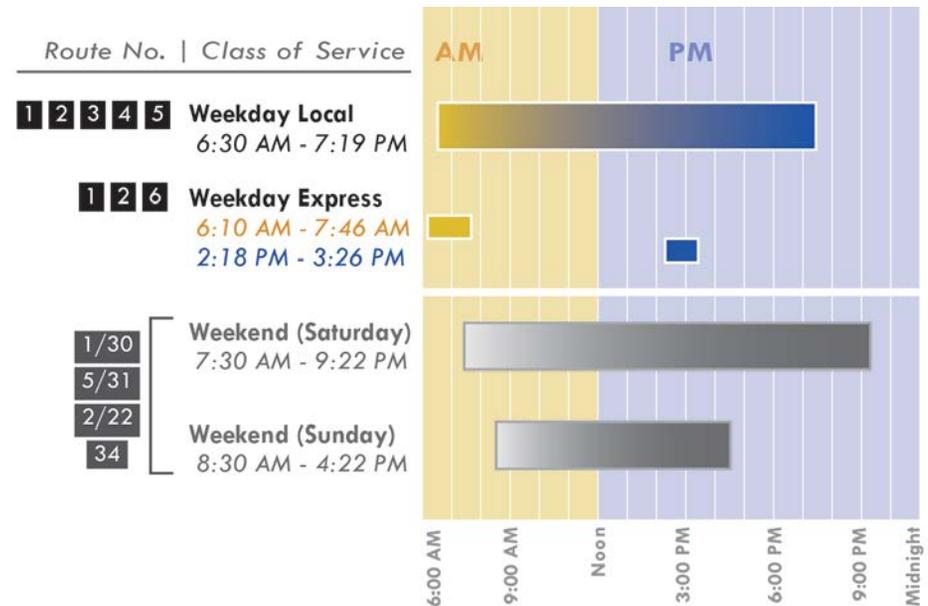
RTD also provides fixed-route service to Lodi via three routes: 23, 723, and 93. The 23 (weekday) and 723 (weekend) connect to Stockton via the Lodi Transit Station, Ham Lane/West Lodi Ave and Kettleman Lane/Tienda Drive transfer points. The 93 is part of the County Hopper route, serving similar destinations as an overlay commuter service. General fares for these Intercity and Hopper routes are \$1.50, with discount fares at \$0.75 per one-way trip. SCT/Link provides one trip each during the am and pm peak or commute hours, traveling between the Lodi Transit Center and Galt City Hall, Cosumnes River College in Elk Grove, and South Sacramento Kaiser Hospital. Fares for the general public are \$2.00 between Lodi and Galt, and \$4.00 between Elk Grove and Sacramento. Both are discounted 50% for senior, disabled, Medicare, and student travelers.

Demand-responsive service is provided through VineLine, a complementary paratransit service to the fixed-route system. Dial-A-Ride is also offered to the general public within the fixed route service area (3/4-mile of the fixed route) during the same days and hours. This service is primarily focused on serving disabled travelers or those not able to use fixed route services, but also open to the general public. Reservations must be made at least 24 hours in advance. Ridership for this service was nearly 39,000 in 2010, but declined initially and is holding steady at about 32,000 trips in recent years, perhaps due to the fare increase in that year. The fare for ADA passengers is \$2.00, while a general public passenger pays \$7.00 per trip.

City of Lodi provides transit services through a fleet of 26 vehicles, with substantial scheduled replacements in FY2018/19 (13 cutaways) and FY2022/23 (6 buses). Consistent with state and local goals, the City will pursue procurement of 'clean' vehicles—with the expectation of CNG acquisition for these purchases.

Recently, the Lodi Transit Station was remodeled to expand the restroom area and install a secured transit vault room. The Short-Range Transit Plan includes a project to expand the existing transit center to accommodate secure bus parking facilities and staff breakout rooms. The city's bus wash construction project has recently been awarded and completion is tentatively scheduled for late FY 16/17.

Figure 2: Span & Class of Fixed Route Service – City of Lodi





## Performance Measures

The following section describes a set of performance measures for City of Lodi, with more detail on measures in a separate chapter. Farebox Revenue and Subsidy per Passenger are shown in Figures 2 and 3 respectively with a year-by-year summary of other metrics in Figure 4.

Figure 3: Ridership and Subsidy per Passenger – City of Lodi

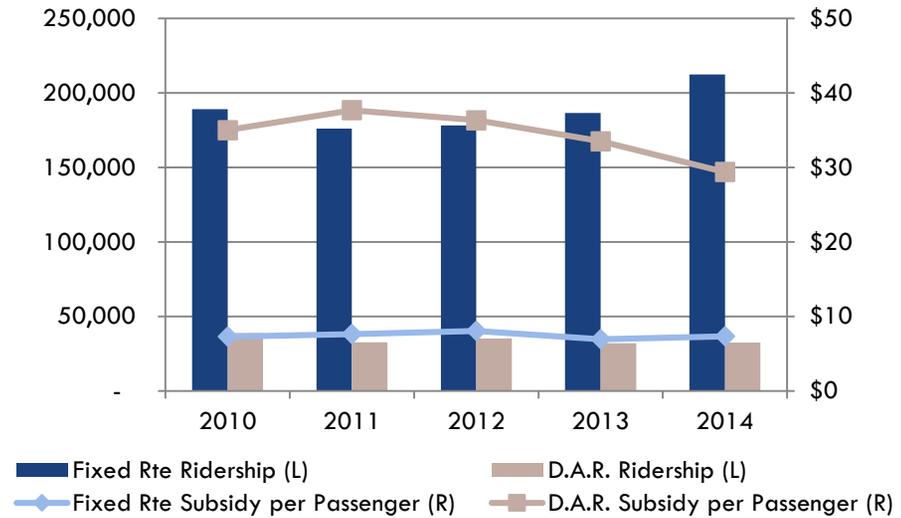


Figure 4: Ridership and Farebox Receipts – City of Lodi

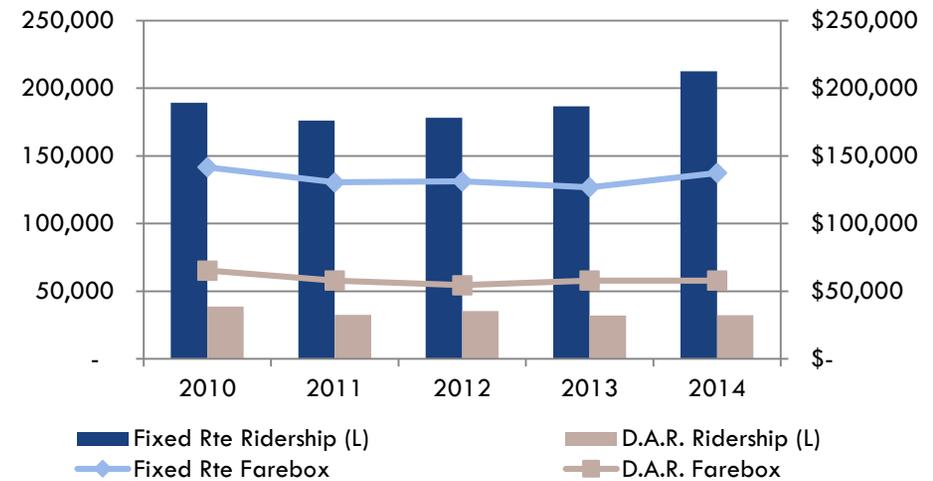




Figure 5: Performance Measures for Transit Operations – City of Lodi

Service Type	Fiscal Year	Ridership	Revenue Hours	Revenue Miles	Operating Cost per Revenue Hr	Operating Cost per Passenger	Farebox Recovery Ratio	Passengers per Revenue Hr	Passengers per Revenue Mile	Subsidy per Passenger
Fixed Route	2009/10	189,123	18,685	228,403	\$ 81.45	\$ 8.05	9%	10.1	0.8	\$ 7.3
	2010/11	176,090	17,624	226,799	\$ 83.70	\$ 8.38	9%	10.0	0.8	\$ 7.6
	2011/12	178,246	18,073	208,250	\$ 86.70	\$ 8.79	8%	9.9	0.9	\$ 8.1
	2012/13	186,704	18,036	210,210	\$ 78.91	\$ 7.62	9%	10.4	0.9	\$ 6.9
	2013/14	212,514	21,254	240,677	\$ 79.82	\$ 7.98	8%	10.0	0.9	\$ 7.3
Dial-a-Ride	2009/10	38,777	17,156	162,910	\$ 82.99	\$ 36.72	5%	2.3	0.2	\$ 35.0
	2010/11	32,679	14,019	132,440	\$ 92.02	\$ 39.48	4%	2.3	0.2	\$ 37.7
	2011/12	35,301	13,679	115,513	\$ 97.76	\$ 37.88	4%	2.6	0.3	\$ 36.3
	2012/13	32,115	11,350	105,234	\$ 99.97	\$ 35.33	5%	2.8	0.3	\$ 33.5
	2013/14	32,377	11,835	109,793	\$ 85.31	\$ 31.18	6%	2.7	0.3	\$ 29.4

A challenging aspect of performance measurement data in rural communities is that transit systems cover large geographic areas with small populations and less dense land uses, which results in comparatively lower ridership and performance metrics. Under Article 4 of the CA Transportation Development Act, claimants are required to maintain a specified ratio of fare revenue to operating cost. Ratio of fare revenues to operating costs at least equal to 20% if serving an urbanized area or 10% if serving a non-urbanized area, or to the ratio it had during the 1978-79 fiscal year, whichever is greater. However, if fares do not meet the applicable ratio, an operator can satisfy that requirement by supplementing its fare revenues with local funds. For contracted transportation service providers claiming funds through Article 8, the San Joaquin Council of Governments Executive Board has waived the farebox and local support ratios. In its place, no more than 90% of the total operating funds (minus depreciation) in the budget may be TDA derived. Additionally, in order to receive TDA operating funds above what was claimed the previous fiscal year, the claimant must have met at least two of the three performance objectives at the end of the third year, in compliance with the previous three-year Transit Systems Performance Objective established by the COG Board. As a small transit provider, City of Lodi is not held to the 20% farebox recovery ratio required of larger transit operators in urbanized areas.

Over the past five years, City of Lodi's Cost per Revenue Hour and Cost per Passenger have been holding steady or trending slightly downward for both Fixed Route and Dial-a-Ride service. A challenging aspect of performance measurement data in rural communities is that transit systems cover large geographic areas with small populations and less dense land uses, which results in comparatively lower ridership and performance metrics. Furthermore, changes to ridership or costs will be more dramatic as a percentage change when looking for trends, as relatively small changes in any one ingredient in the metric can have substantial results when the metric is calculated. For example, in Lodi, fixed-route ridership per revenue hour decreased (from 10.4 in 2013 to 10.0 in 2014) as a result of an increase in service hours of more than 18%. The result is a decrease in productivity as measured in passengers per revenue hour. These types of changes and reactions are very common in systems large and small as transit systems work their way out of "The Great Recession." In a smaller system like Lodi, the results can be counter-intuitive and may not create a stable trend for several years into the future.

### Anticipated Funding Picture

City of Lodi anticipates approximately \$17.6M of capital expenditures to support ongoing improvements to GrapeLine service within the 10-year timeframe of the next RTSP. Annual operating expenses begin at approximately \$3M in 2014/15 growing to \$4.3M within 10 years. To support these activities City of Lodi receives funding from local, state, regional and federal sources.



Specifically, City of Lodi makes use of the funding sources listed in Figure 6. A more detailed description of capital and operating expenses are described below in Figures 7 and 8, respectively.

It should be noted that a large portion of funding for City of Lodi comes via Federal and State programs. Over the next ten years, City of Lodi intends to continue improving its existing, core service through ongoing maintenance activities, including its bus shelters and maintenance facilities. Such improvements include station upgrades such as real-time information through NextBus, which will complement the automatic vehicle location system to be implemented by 2017. In addition, Lodi plans comfort and security upgrades to its existing transit station and construction of a new Southwest Lodi Transit Center. The most significant purchases include the fleet replacement plans—replacing more than 20 of its 26 vehicles by FY 2022/23—and construction of the new transfer facility in Southwestern Lodi.

Based on a combination of data provided in the City of Lodi’s SRTP and information provided by City of Lodi staff, funding assumptions for foreseeable capital projects and related operating costs, the costs associated with the continued operation of existing services, and anticipated revenue available to fund these projects and operations are summarized in Figures 7 and 8. Details related to specific planned expenditures are described below:

- **Automatic Vehicle Location System** – improved technology allows vehicle location to be tracked. Project is expected to be implemented in FY 15/16 and FY 17/18.
- **NextBus System** – pairs with the Automatic Vehicle Location System for integration with the “NextBus” smartphone application, which provides real-time tracking of individual buses. Project is expected to be implemented in FY 17/18.
- **Bus Replacement** – City of Lodi intends to purchase replacements for its existing fleet, including purchases in six of the next ten years. Planned bus replacements in FY 18/19 and FY 22/23 account for 53% of the anticipated bus purchases.
- **Bus Shelters and Bus Stop Improvements and Facility / Transit Station Upgrades** – ongoing improvements, repairs, and replacements at City of Lodi facilities.
- **Security System at Transit Station** – Installation of security upgrades at the Lodi Transit Station in FY 16/17 and FY 18/19.
- **Southwest Transit Transfer Center** – development of a new transfer station includes funding for environmental clearance.
- **Transit Facilities Safety & Security System** – additional systemwide safety improvements utilizing TSSSDRA funding. It should be noted that the City has not received TSSSDRA funding for FY 14/15, FY 15/16, and FY 16/17. Funding received by the City of Lodi may not match project costs, as such, revenues to match project costs are not included in Figure 7.
- **Transit Station Expansion** – the planned expansion of the existing transit station includes funding for environmental clearance in FY 15/16, and funding for construction in two phases.

**Figure 6: Transit Funding Sources – City of Lodi**

Local Funds & Fare Revenue	Regional & State Funds	Federal Funds
Passenger Fares		FTA 5307
Annual Local Transportation Funds Operating Revenues (collected locally and redistributed by state)	State Transit Assistance	CMAQ
Advertising	Proposition 1B – TSSSDRA	FTA 5307- Capital
Transfer From Operating Surplus	Proposition 1B – PTMISEA	FTA 5339 (pending)
	Low Carbon Transit Operation Funds	



Figure 7: Financial Summary for Transit Capital Projects – City of Lodi

Capital Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
FTA 5307	\$567,800	\$280,000	\$180,100	\$185,500	\$191,000	\$196,800	\$202,700	\$208,800	\$215,000	\$221,500	\$2,449,200
CMAQ	\$1,572,844		\$630,000		\$1,164,200	\$368,950	\$190,000		\$1,500,000		\$5,425,994
Transfer from Operations	\$856,916	\$320,683	\$174,162	\$611,286	\$483,195	\$475,200	\$466,900	\$458,700	\$449,900	\$440,660	\$4,737,602
Unspecified	\$575,540	\$1,342,017	\$1,144,738		\$1,143,300						\$4,205,595
<b>Subtotal</b>	<b>\$3,573,100</b>	<b>\$1,942,700</b>	<b>\$2,129,000</b>	<b>\$796,786</b>	<b>\$2,981,695</b>	<b>\$1,040,950</b>	<b>\$859,600</b>	<b>\$667,500</b>	<b>\$2,164,900</b>	<b>\$662,160</b>	<b>\$16,818,391</b>
<b>Expenses:</b>											
Automatic Vehicle Location System		\$500,000		\$33,800							\$533,800
NextBus System				\$40,000							\$40,000
Bus Replacement	\$2,633,600		\$1,050,000		\$2,328,400	\$737,900	\$380,000		\$3,000,000		\$10,129,900
Bus Shelters and Bus Stop Improvements	\$728,900	\$350,000	\$350,000	\$115,900	\$119,400	\$123,000	\$126,700	\$130,500	\$134,400	\$138,432	\$2,317,232
Facility / Transit Station Upgrades	\$57,900	\$492,200	\$600,000	\$139,100		\$147,600		\$156,600			\$1,593,400
Security System at Transit Station			\$129,000		\$143,300						\$272,300
Southwest Transit Transfer Station				\$750,000							\$750,000
Transit Facilities Safety & Security System				\$200,000							\$200,000
Transit Station Expansion	\$152,700	\$600,500			\$1,000,000						\$1,753,200
<b>Subtotal</b>	<b>\$3,573,100</b>	<b>\$1,942,700</b>	<b>\$2,129,000</b>	<b>\$1,278,800</b>	<b>\$3,591,100</b>	<b>\$1,008,500</b>	<b>\$506,700</b>	<b>\$287,100</b>	<b>\$3,134,400</b>	<b>\$138,432</b>	<b>\$17,589,832</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>(\$482,014)</b>	<b>(\$609,405)</b>	<b>\$32,450</b>	<b>\$352,900</b>	<b>\$380,400</b>	<b>(\$969,500)</b>	<b>\$523,728</b>	<b>(\$771,441)</b>

Source: City of Lodi



Figure 8: Financial Summary for Transit Operations – City of Lodi

Transit Operations	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
Fare Revenue	\$214,222	\$223,300	\$225,100	\$227,100	\$229,100	\$231,200	\$233,100	\$235,300	\$237,300	\$239,300	\$2,295,022
Advertising Revenue		\$20,000	\$20,600	\$21,200	\$21,800	\$22,500	\$23,200	\$23,900	\$24,600	\$25,300	\$203,100
Measure K Sales Tax				\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$400,000	\$2,800,000
TDA - LTF Revenue	\$2,016,078	\$2,043,057	\$1,953,562	\$2,068,786	\$2,006,795	\$2,067,000	\$2,129,000	\$2,193,000	\$2,258,800	\$2,326,564	\$21,062,642
TDA - STA Revenue	\$265,894	\$185,926	\$186,000	\$186,000	\$186,000	\$186,000	\$186,000	\$186,000	\$186,000	\$186,000	\$1,939,820
Federal Funding	\$1,357,538	\$1,276,600	\$1,320,000	\$1,345,200	\$1,385,600	\$1,427,100	\$1,469,900	\$1,514,000	\$1,559,500	\$1,606,285	\$14,261,723
Transfer to Capital	(\$856,916)	(\$320,683)	(\$174,162)	(\$611,286)	(\$483,195)	(\$475,200)	(\$466,900)	(\$458,700)	(\$449,900)	(\$440,660)	(\$4,737,602)
<b>Subtotal</b>	<b>\$2,996,816</b>	<b>\$3,428,200</b>	<b>\$3,531,100</b>	<b>\$3,637,000</b>	<b>\$3,746,100</b>	<b>\$3,858,600</b>	<b>\$3,974,300</b>	<b>\$4,093,500</b>	<b>\$4,216,300</b>	<b>\$4,342,789</b>	<b>\$37,824,705</b>
<b>Expenses:</b>											
Operating Costs	\$2,996,816	\$3,176,900	\$3,272,200	\$3,370,400	\$3,471,500	\$3,575,700	\$3,682,900	\$3,793,400	\$3,907,200	\$4,024,416	\$35,271,432
Costs for Expansion		\$251,300	\$258,900	\$266,600	\$274,600	\$282,900	\$291,400	\$300,100	\$309,100	\$318,373	\$2,553,273
<b>Subtotal</b>	<b>\$2,996,816</b>	<b>\$3,428,200</b>	<b>\$3,531,100</b>	<b>\$3,637,000</b>	<b>\$3,746,100</b>	<b>\$3,858,600</b>	<b>\$3,974,300</b>	<b>\$4,093,500</b>	<b>\$4,216,300</b>	<b>\$4,342,789</b>	<b>\$37,824,705</b>
<b>Funding Shortfall / Surplus:</b>											
Total	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

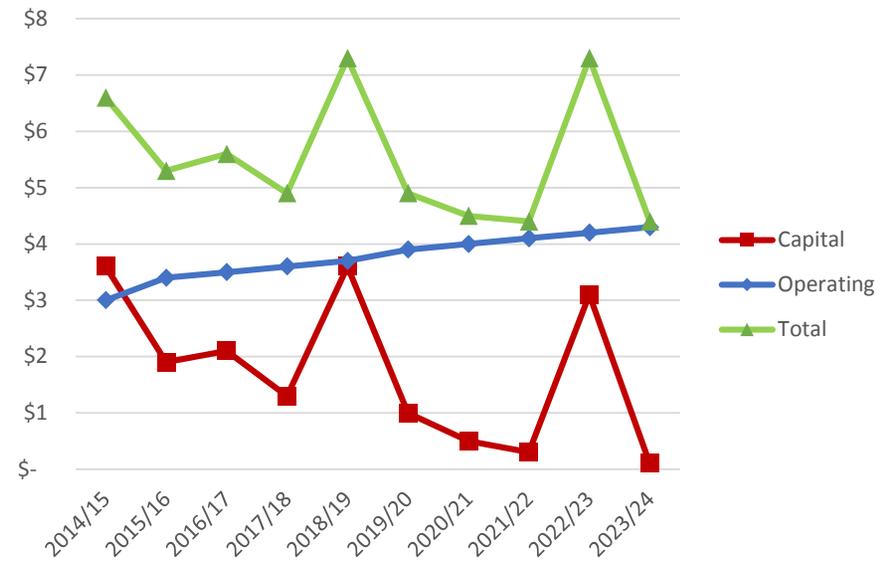
Source: Lodi Transit 2013 Short Range Transit Plan



City of Lodi's operating and capital expenses are presented graphically to the right. As shown, capital costs range from as low as \$287,100 in FY 21/22 to as high as \$3,591,100 in FY 18/19. Spikes in capital expenditures can be attributed to major capital investments for specific projects in key years, such as a significant vehicle replacement cycle in FY 14/15, as well as in FY 18/19 and FY 22/23. Aside from years with bus replacements planned, ongoing capital expenses remain below \$2M annually. However, note that capital costs are generally lower on an annual basis than operating costs, which range from \$2,996,816 in FY 14/15 to \$4,342,789 in FY 23/24. Additionally, operating expenses are expected to increase annually at a rate of 3%, which is consistent with growth rates for operating expenses of comparable transit agencies within this geographic area. This projection reflects a constrained financial outlook, rather than the full complement of City of Lodi's vision for GrapeLine service. As more local or federal funding becomes available, there may be opportunities to revisit Lodi's long-range plans for operating enhancements or capital improvements.

Based on the information provided in Figure 7, City of Lodi's capital costs are anticipated to exceed available revenue by \$771,441 over a 10-year period. Though it should be noted that City of Lodi's capital budget would be constrained through FY 16/17. Based on the information shown in Figure 8, City of Lodi's operating costs are financially constrained by the available revenue. City of Lodi would neither have a surplus or shortfall as it relates to its transit operating costs. If projected need and revenue are realized as projected, City of Lodi would experience a \$771,441 gap in funds over the 10-year period. City of Lodi has increased advertising efforts on buses and shelters to raise additional funds. City of Lodi estimates that additional advertising on the six vehicles could generate as much as \$25,000 per year.

Figure 9: Transit Operating and Capital Expenses – City of Lodi



## 6 MANTECA TRANSIT

TRANSIT SYSTEM PROFILE



## CITY OF MANTECA (MANTECA TRANSIT)

Originally an agricultural community, Manteca has grown into its own as a Bay Area suburb after the completion of State Route 120. Known as “The Family City,” Manteca has realized a 36% population increase since 2000 and current figures from the 2010 Census indicate Manteca is home to more than 67,000 residents. Median household income for Manteca is just over \$65,000, more than 25% higher than the countywide value of \$51,432<sup>1</sup>. Of the citywide population, 11% are low-income, 10% are seniors, 25% are youth, and 2% do not have a private vehicle. These segments of the population tend to be most dependent on transit service.

Launched in November 2006 with just two routes, Manteca Transit is still a young and growing bus system. In its first eight months of operation, the system transported 10,256 passengers. With the development of the City’s first Short Range Transit Plan in 2008, the fixed route system expanded from two to three routes in January 2010. By the end of the first year of service, the system transported almost 15,000 passengers.

The City updated its Short Range Transit Plan in 2014 and plans are underway to implement service changes to increase transit’s footprint in the community and best serve the transportation needs of Manteca’s growing population.

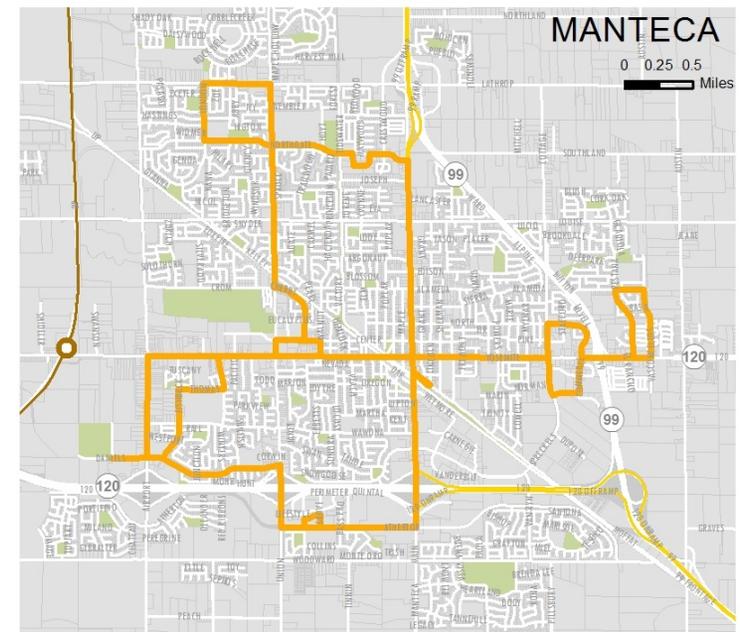
### Transit System at a Glance

Manteca Transit currently offers three fixed routes Monday through Friday between 6:00 am and 7:00 pm. These three routes provide local service within the city, as well as connections to regional transit routes operated by RTD via the Manteca Transit Center and can take riders within one block of the Lathrop-Manteca Altamont Corridor Express (ACE) rail station. By utilizing these services, patrons can connect to such communities as Ripon, San Jose, Stockton, and Tracy.

Manteca Transit also provides curb-to-curb Dial-a-Ride service for seniors (age 62 and up), Medicare recipients, and persons with disabilities on weekdays between 6:00 am and 7:00 pm. On Saturdays, Dial-a-Ride service is offered to the general public between 9:00 AM and 4:00 PM.

In 2014, system-wide ridership was 75,399 one-way passenger-trips, an increase of 8.3% over 2013. Manteca Transit offers cash fares and monthly passes. General fares are \$1.00 per trip, though reduced price cash fares are available for youth, seniors and passengers with disabilities. Children under five years of age ride free.

Figure 1: Service Area – Manteca Transit



- Manteca Transit
- RTD
- City Limits
- County Limit



Data: SJCOG, San Joaquin County, Nelson\Nygaard

<sup>1</sup> 2013 American Community Survey, US Census Bureau.



The City of Manteca expects to experience steady population growth over the next ten years and with that anticipated growth, the transit system will adapt and expand service and related amenities where necessary in order to accommodate that growth. In addition, several major projects are underway which are likely to impact transit needs in the community. They include the development of a "Family Entertainment Zone." This project will encompass more than 140 acres, and consists of a large-scale recreation resort featuring an indoor water park, sports, and other leisure and recreational attractions, along with a hotel and conference center. The City will also be embarking on a comprehensive update of its General Plan involving a great deal of public input to set the course for the growth of the City over the next 20 years. It is expected that transit will be addressed in the Circulation element of the General Plan and changes will be updated to reflect the anticipated growth. To further accommodate anticipated growth, the City will be constructing a new freeway interchange at SR 120 and McKinley Avenue. This long-anticipated project will help to meet future traffic demands and improve circulation.

During the five-year period between fiscal years of 2014-15 and 2020-21, Manteca Transit will improve the bus stops, promote bus transfer policy, develop a travel training program and improve the availability of transit passes. Manteca Transit will also invest in operation improvements that include route alignments to increase the transit "footprint" and enhance interconnectivity and performance, extend service to provide an ACE rail connection, revise the Dial-A-Ride fare policy to improve fare box recovery, and implement a six-month trial fixed route service on Saturdays.



## Performance Measures

The following section describes a set of performance measures for Manteca Transit, with more detail on measures in a separate chapter. Farebox Revenue and Subsidy per Passenger are shown in Figures 2 and 3 respectively with a year-by-year summary of other metrics in Figure 4.

Figure 2: Ridership and Subsidy per Passenger – Manteca Transit

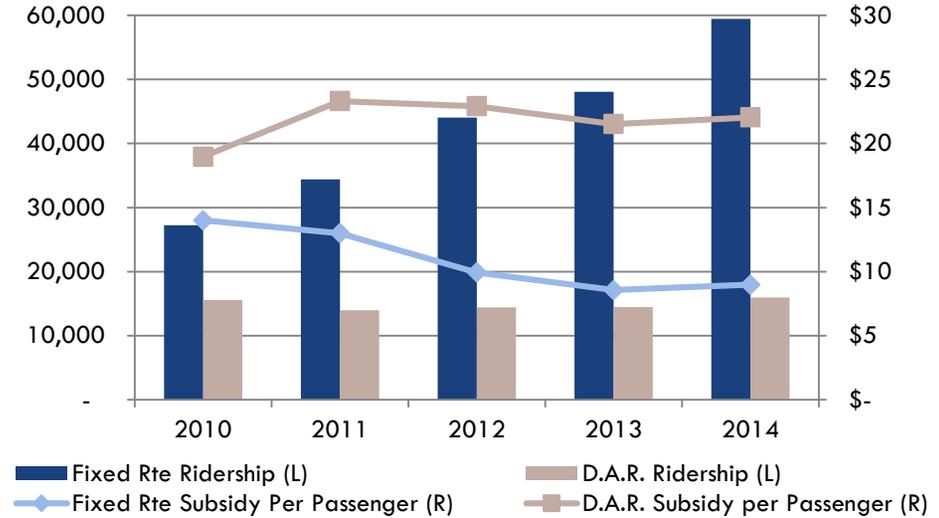


Figure 3: Ridership and Farebox Receipts – Manteca Transit

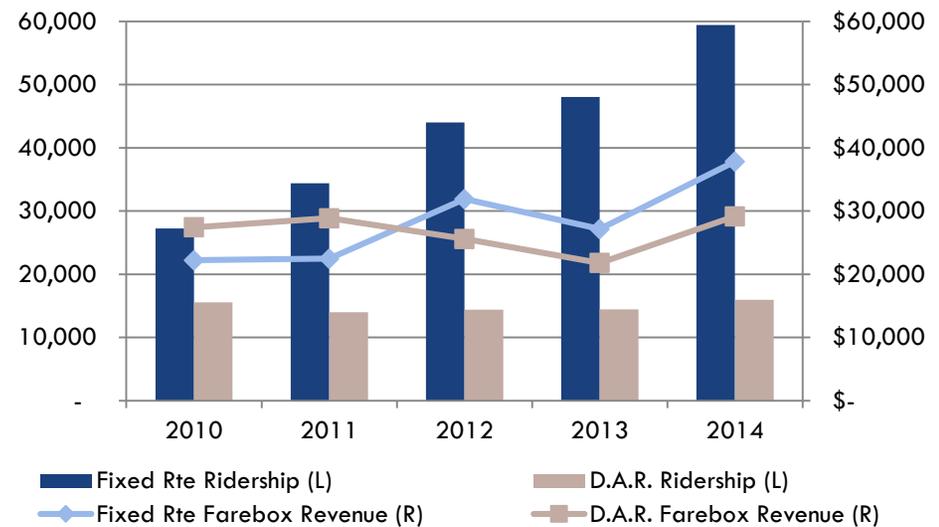




Figure 4: Performance Measures for Transit Operations – Manteca Transit\*

Service Type	Fiscal Year	Ridership	Revenue Hours	Revenue Miles	Operating Cost per Revenue Hr	Operating Cost per Passenger	Farebox Recovery Ratio	Passengers per Revenue Hr	Passengers per Revenue Mile	Subsidy per Passenger
Fixed Route	2009/10	27,240	8,345	101,063	\$ 48.37	\$ 14.82	5.5%	3.3	0.3	\$14.00
	2010/11	34,392	10,200	99,490	\$ 46.01	\$ 13.65	4.8%	3.4	0.3	\$12.99
	2011/12	44,043	10,025	130,684	\$ 46.80	\$ 10.65	6.8%	4.4	0.3	\$9.93
	2012/13	48,072	9,912	130,361	\$ 44.24	\$ 9.12	6.2%	4.8	0.4	\$8.56
	2013/14	59,447	9,954	131,570	\$ 57.40	\$ 9.61	6.6%	6.0	0.5	\$8.97
Dial-a-Ride	2009/10	15,542	4,060	41,556	\$ 79.41	\$ 20.74	8.5%	3.8	0.4	\$18.98
	2010/11	13,981	3,954	39,345	\$ 89.75	\$ 25.38	8.1%	3.5	0.4	\$23.32
	2011/12	14,407	4,148	43,731	\$ 85.76	\$ 24.69	7.2%	3.5	0.3	\$22.92
	2012/13	14,461	4,187	44,427	\$ 79.56	\$ 23.03	6.5%	3.5	0.3	\$21.53
	2013/14	15,952	4,213	46,775	\$ 90.41	\$ 23.88	7.7%	3.8	0.3	\$22.05

Manteca Transit ridership has been increasing steadily, with Fixed Route ridership increasing by as much as 28% or more some years, resulting in fixed route ridership more than doubling in the past 5 years. Throughout this 5-year period, despite rising overall operating costs, Operating Cost per Passenger and most notably Subsidy per Passenger have been decreasing steadily as a result of the ridership gains. Steady increases in both Passengers per Revenue-Hour and per Revenue-Mile further demonstrate improvements for fixed route services and economic recovery. Dial-A-Ride performance was more static during this period, with metrics such as Subsidy per Passenger holding steady. Dial-A-Ride ridership dipped in 2011, but returned to its previous peak at nearly 16,000 passenger trips in 2014. These types of changes and reactions are very common in systems large and small as transit systems work their way out of “The Great Recession.”

\*Under Article 4 of the CA Transportation Development Act, claimants are required to maintain a specified ratio of fare revenue to operating cost. Ratio of fare revenues to operating costs at least equal to 20%, if serving an urbanized area, or 10% if serving a non-urbanized area, or to the ratio it had during the 1978-79 fiscal year, whichever is greater. However, if fares do not meet the applicable ratio, an operator can satisfy that requirement by supplementing its fare revenues with local funds. For contracted transportation service providers claiming funds through Article 8, SJCOG Board has waived the farebox and local support ratios. In its place, no more than 90% of the total operating funds (minus depreciation in the budget may be TDA derived. Additionally, in order to receive TDA operating funds above what was claimed the previous fiscal year, the claimant must have met at least two of the three performance objectives at the end of the third year, in compliance with the previous three-year Transit Systems Performance Objectives established by SJCOG Board. As a small transit provider, the City of Manteca is not held to the 20% farebox recovery ratio required of larger transit operators in urbanized areas.

### Anticipated Funding Picture

Manteca Transit receives funding from local, state, regional and federal sources. Specifically, Manteca Transit makes use of the funding sources listed in Figure 6 below.

Over the next ten years, Manteca Transit intends to continue its bus replacement and expansion program, improve bus shelters and bus facilities, maintain the Manteca Transit Center facility and continue its base operations. Based on a combination of data provided in the City of Manteca’s SRTP and information provided by Manteca Transit staff, funding assumptions



for foreseeable capital projects and related operating costs, the costs associated with the continued operation of existing services, and anticipated revenue available to fund these projects and operations are summarized in Tables 5 and 6.

Details related to specific planned expenditures are described below:

- **Fleet Replacement/Expansion** – Manteca Transit intends to purchase replacements buses for its existing fleet, along with one expansion bus programmed in FY 14/15 and FY 15/16. This combined purchase will bring the 7-bus fleet up to 8. These buses will have reached their useful life and will need to be replaced in FY 20/21.
- **Bus Shelters and Benches** –New shelters and benches in FY 15/16 to enhance some of the existing bus stops which are in need of passenger amenities. Annual improvements to existing shelters to upgrade and/or replace benches, signage and related appurtenances is included through subsequent years.
- **Bus Enhancements** – Replace the existing farebox vault equipment with an automated fare collection system; installation of GPS-based route tracking technology to improve on-time performance and provide real-time travel information.
- **Passenger Security** –Security cameras at various bus stops along the City's fixed route system for crime prevention and passenger safety.
- **Travel Training** – As recommended by Manteca's SRTP, a travel training program will be implemented in FY 16/17, to promote mobility via outreach efforts and informational workshops educating non-riders and ambulatory Dial-a-Ride passengers on how to use local fixed route transit system. Funding annually to maintain program is included.
- **Transit Center Improvements** – FY 15/16 project includes installation of various safety/security amenities at the Manteca Transit Center including security doors, refuse enclosure improvements, upgrades to fire/intruder alarm system. Funding is included in subsequent years for improvements and repairs not yet anticipated but may be necessary due to aging of building and its major components.
- **Bus Barn and Maintenance Facility** – This project would construct a bus maintenance facility near the Manteca Transit Center. This facility will include a bus storage and parking barn, a maintenance bay equipped with a vehicle-lift and drop pit, room for storing specialized equipment for maintaining transit vehicles, and a bus parts storage area. This project is estimated to cost approximately \$3,000,000, and would include the purchase of property.
- **Security Camera Installation at Transit Center** – This project would install security cameras at key locations, interior and exterior, at the Manteca Transit Center.

**Figure 5: Transit Funding Sources – Manteca Transit**

Local Funds & Fare Revenue	Regional & State Funds	Federal Funds
Passenger Fares	State Transit Assistance (STA)	FTA 5307
Annual Local Transportation Funds (LTF) Operating Revenues (collected locally and redistributed by state)	Proposition 1B - PTMISEA	FTA 5339

While Manteca Transit has provided a blueprint of potential capital projects that will take it through the next ten-year period, it is important to note that these are estimates only and there are many variables which may change the projects and the year they are programmed. In addition, Manteca Transit will evaluate the tiered implementation of the service and administrative enhancements recommended in the STRP for feasibility and applicability each year and revise its operating and capital program accordingly. In addition, as of the 2010 Census, the City of Ripon is now recognized as a sub-recipient in the Manteca UZA. It is anticipated that this change will have an unknown, yet potentially significant, impact on Manteca's operating and capital projects and funding projections at some point in the ten-year period of the RTSP.

It should be noted that a large portion of funding for Manteca Transit comes via federal and state programs. The Federal Department of Transportation provides apportionments, allocations and program information to the FTA which provides the FTA with contract authority to carry out its formula assistance programs with grantees each year. There have been instances in the past where the FTA was only granted partial contract authority by Congress, thereby limiting the amount of transportation funds available to grantees. Therefore, Manteca is unable to provide annual revenue estimates for capital projects until such time that the funds have been awarded.



Figure 6: Financial Summary for Transit Capital Projects – Manteca Transit

Capital Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
FTA 5307 *	\$300,000	\$585,000	\$1,082,239	\$1,018,397	\$948,170	\$870,921	\$785,947	\$692,475	\$589,656	\$476,555	\$7,349,360
FTA 5339	----	\$192,771	----	----	----	----	----	----	----	----	\$192,771
TDA – LTF	\$75,000	\$140,000	----	----	----	----	----	----	----	----	\$215,000
TDA – STA	----	\$152,410	----	----	----	----	----	----	----	----	\$152,410
Prop 1B - PTMISEA, TSSDRA	----	\$712,635	----	----	----	----	----	----	----	----	\$712,635
<b>Subtotal</b>	<b>\$375,000</b>	<b>\$1,782,816</b>	<b>\$1,082, 239</b>	<b>\$1,018,397</b>	<b>\$948,170</b>	<b>\$870,921</b>	<b>\$785,947</b>	<b>\$692,475</b>	<b>\$589,656</b>	<b>\$476,555</b>	<b>\$8,622,176</b>
<b>Expenses:</b>											
Fleet Replacement/Expansion	\$375,000	\$700,000	\$200,000	----	----	----	\$1,400,000	----	\$600,000	----	\$3,275,000
Bus Shelters & Benches	----	\$438,196	\$25,047	\$25,673	\$26,315	\$375,000	\$27,631	\$250,000	\$262,500	\$275,625	\$1,705,987
Bus Enhancements	----	\$250,000	----	\$375,000	----	----	----	\$500,000	----	----	\$1,125,000
Passenger Security	----	\$122,035	----	\$130,000	----	\$136,500	----	\$143,325	----	\$150,491	\$682,351
Travel Training	----	----	\$75,000	\$25,000	\$26,250	\$27,563	\$28,941	\$30,388	\$31,907	\$33,502	\$278,550
Transit Center Improvements	----	\$272,585	\$100,000	\$105,000	\$110,250	\$115,763	\$121,551	\$127,628	\$134,010	\$140,710	\$1,227,496
S RTP Update				\$40,000				\$120,000			\$160,000
Bus Maintenance & Storage Facility				\$1,000,000	\$1,000,000	\$1,000,000					\$3,000,000
Installation of Security Cameras at Transit Center				\$100,000							\$100,000
<b>Subtotal</b>	<b>\$375,000</b>	<b>\$1,782,816</b>	<b>\$400,047</b>	<b>\$1,800,673</b>	<b>\$1,162,815</b>	<b>\$1,654,825</b>	<b>\$1,578,122</b>	<b>\$1,171,341</b>	<b>\$1,028,417</b>	<b>\$600,329</b>	<b>\$11,554,384</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$682,192</b>	<b>(\$782,276)</b>	<b>(\$214,645)</b>	<b>(\$783,904)</b>	<b>(\$792,175)</b>	<b>(\$478,866)</b>	<b>(\$438,761)</b>	<b>(\$123,774)</b>	<b>(\$2,932,208)</b>

\* Due to the unpredictability of Section 5307 funding, Manteca Transit is utilizing its FY 15/16 figure as the baseline apportionment through FY 23/24.

Source: City of Manteca



Figure 7: Financial Summary for Transit Operations – Manteca Transit

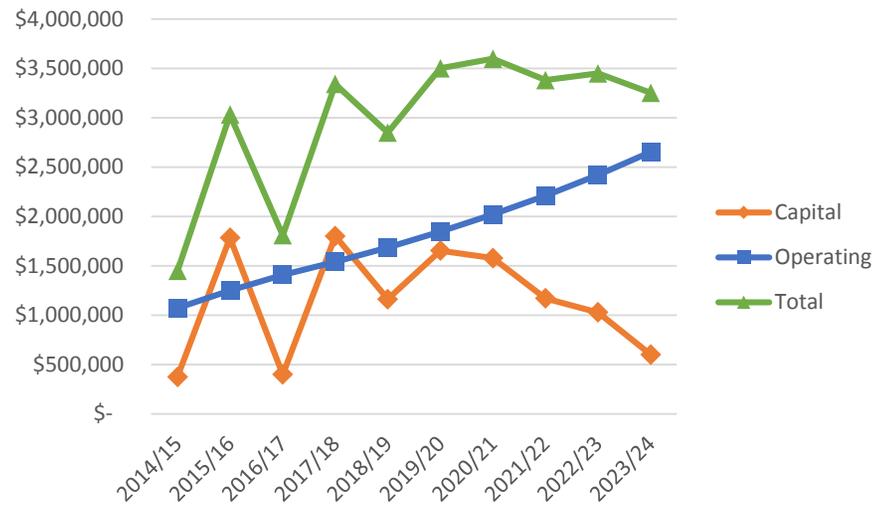
Transit Operations	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
Fare Revenue	\$51,672	\$54,084	\$56,789	\$59,628	\$62,610	\$65,740	\$68,370	\$71,105	\$73,949	\$76,907	\$640,854
TDA - LTF Revenue	\$473,963	\$571,995	\$629,195	\$692,114	\$761,325	\$837,458	\$921,204	\$1,013,324	\$1,114,656	\$1,226,122	\$8,241,356
TDA - STA Revenue	----	----	\$40,400	\$41,410	\$42,445	\$43,506	\$44,376	\$45,264	\$46,170	\$47,093	\$350,664
Federal Funding	\$523,271	\$580,386	\$638,425	\$702,267	\$772,494	\$849,743	\$934,717	\$1,028,189	\$1,131,008	\$1,244,109	\$8,404,609
Rental/Advertising	\$23,814	\$42,500	\$44,200	\$45,968	\$47,807	\$49,719	\$51,708	\$53,776	\$55,927	\$58,164	\$473,583
<b>Subtotal</b>	<b>\$1,072,720</b>	<b>\$1,248,965</b>	<b>\$1,409,008</b>	<b>\$1,541,387</b>	<b>\$1,686,681</b>	<b>\$1,846,166</b>	<b>\$2,020,375</b>	<b>\$2,211,658</b>	<b>\$2,421,711</b>	<b>\$2,652,395</b>	<b>\$18,111,066</b>
<b>Expenses:</b>											
Operating Costs	\$1,072,720	\$1,248,965	\$1,409,008	\$1,541,387	\$1,686,681	\$1,846,166	\$2,020,375	\$2,211,658	\$2,421,711	\$2,652,395	\$18,111,066
<b>Subtotal</b>	<b>\$1,072,720</b>	<b>\$1,248,965</b>	<b>\$1,409,008</b>	<b>\$1,541,387</b>	<b>\$1,686,681</b>	<b>\$1,846,166</b>	<b>\$2,020,375</b>	<b>\$2,211,658</b>	<b>\$2,421,711</b>	<b>\$2,652,395</b>	<b>\$18,111,066</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>\$0</b>										

Source: Manteca Transit Short Range Transit Plan

Manteca Transit's operating and capital expenses are presented graphically to the right. Manteca's SRTP has established three tiers of system investments in order to plan thoughtfully for the uncertain federal transportation funding environment. All costs are included here; however, Manteca Transit shows only operating and near-term capital revenues given the uncertainty of federal transportation funding. If these contributions do not continue, Manteca transit would experience a bleak outlook given capital needs totaling \$11.6M over the coming 10-year period. These funds would enable major vehicle rehabilitation and replacement activities in 2015/16, 2020/21, and 2022/23, as well as security improvements.

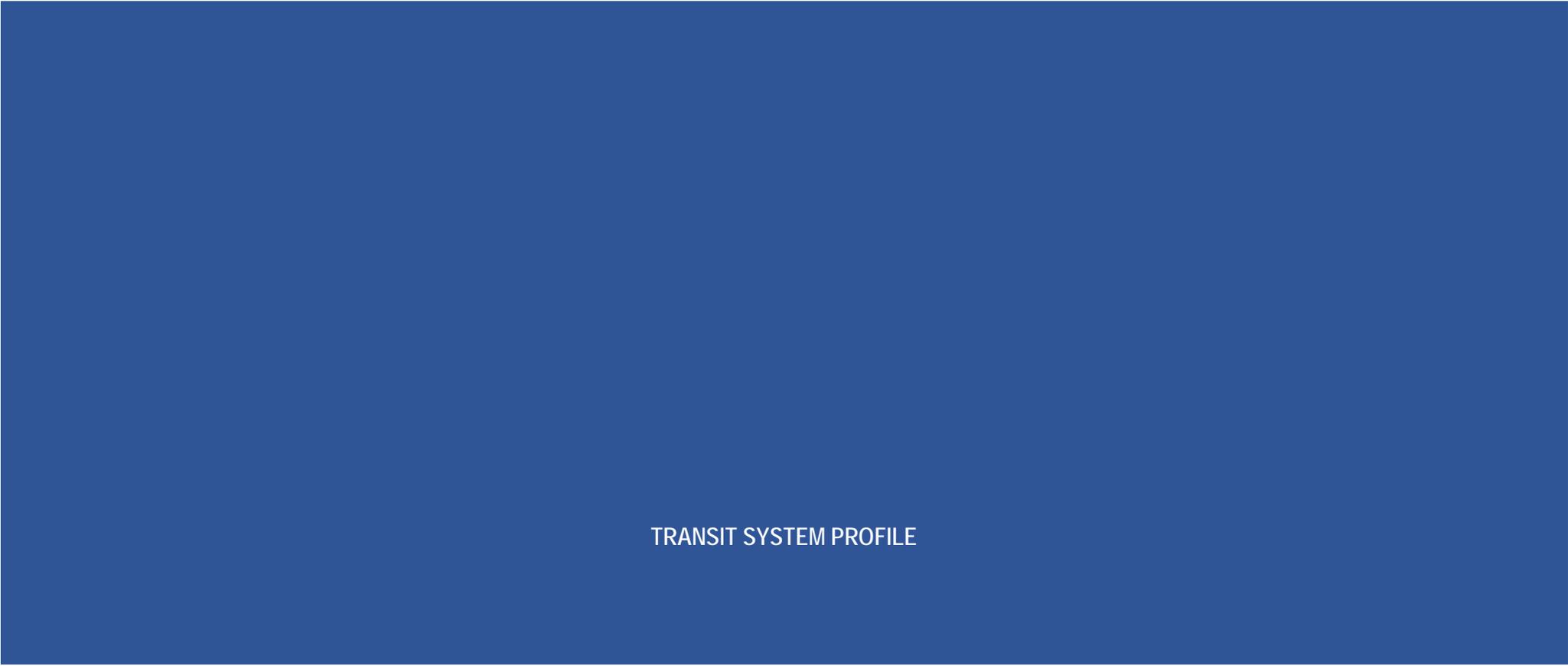
Manteca anticipates a base operating cost just under \$1.1M, growing to \$2.7M by 2023/24 as costs and services increase. Federal and LTF funds together will comprise approximately 90% of operating revenue support over the coming years. As a small transit provider, Manteca is not held to the 20% farebox recovery ratio required of larger transit operators in urbanized areas. While Manteca's farebox revenue may be modest, it also offsets operating costs with TDA-STA funds, rental income and advertising revenue.

Figure 8: Transit Operating and Capital Expenses – Manteca Transit





## 7 CITY OF RIPON - BLOSSOM EXPRESS



TRANSIT SYSTEM PROFILE

# HISTORIC RIPON

Est. 1874

## CITY OF RIPON – BLOSSOM EXPRESS

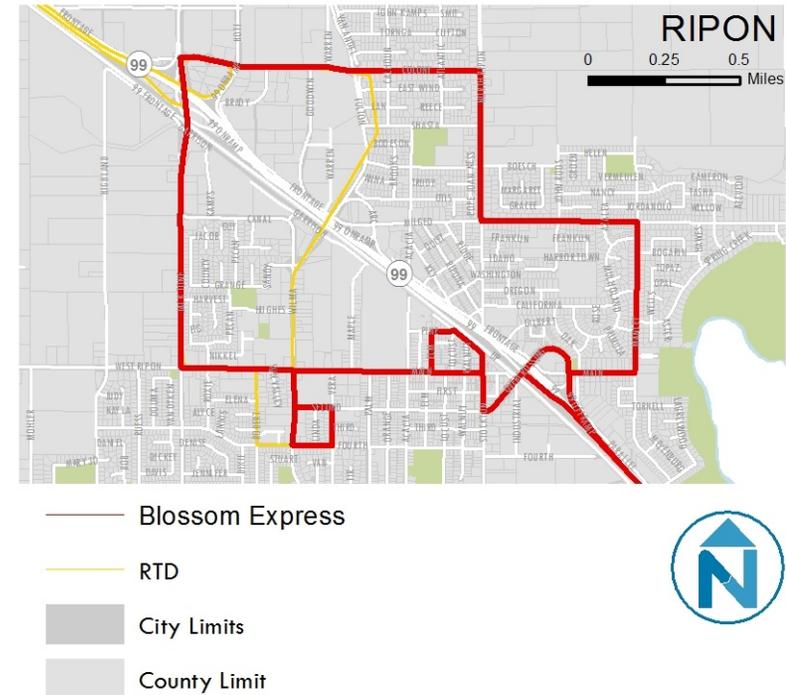
Per the United States Census Bureau, in 2010, the City of Ripon had a population of approximately 14,297 people. Of this population, 11.8% were elderly, 9.7% were low-income, 28.8% were youths, and 1.4% did not have access to a private vehicle. These segments of the population tend to be most dependent on transit service. Systemwide ridership in Fiscal Year 2014/15 on all City of Ripon transit services was 945 one-way passenger-trips.

### Transit System at a Glance

In 2013, the City of Ripon purchased its first Compressed Natural Gas (CNG) bus and began operations. The Blossom Express operates Tuesdays and Thursdays with service throughout Ripon and Modesto including, the Save Mart shopping center, Historic Downtown Ripon, the Ripon Library, Kaiser Hospital, the Vintage Faire Mall, Target and Best Buy shopping centers on Sisk Road in Modesto. The bus makes four continuous roundtrip loops every Tuesday and Thursday beginning in Ripon, traveling to Modesto, and returning to Ripon: two roundtrips in the morning and two roundtrips in the afternoon. City Staff monitors the route and makes adjustments to the route as necessary and as needs arise. Fares are \$2.00 and \$1.00 for seniors, persons with disabilities, and students.

The City of Ripon also owns a nine-passenger van that provides transit service for local trips and trips to Modesto. Service is designed to meet the needs of the elderly and disabled but is open to the general public. The City has entered into an agreement with the local senior living facilities that are served by these routes, where they provide volunteer drivers to meet the demand. Ridership has been quite small, ranging from 400 to 600 passengers a year. Fares are \$1.00 and \$1.50 depending upon destination. Riders not associated with the facilities are charged a \$15 fare.

Figure 1: Ripon Blossom Express Service Area



Data Sources: SJCOG, San Joaquin County, NelsonNygaard



### Performance Measures

The following section describes a set of performance measures for Ripon's transit service, with more detail on measures in a separate chapter. Farebox Revenue and Farebox Recovery Ratio are shown in Figures 2 and 3 respectively with a year-by-year summary of other metrics in Figure 4.

Figure 2: Ridership and Farebox Recovery Ratio

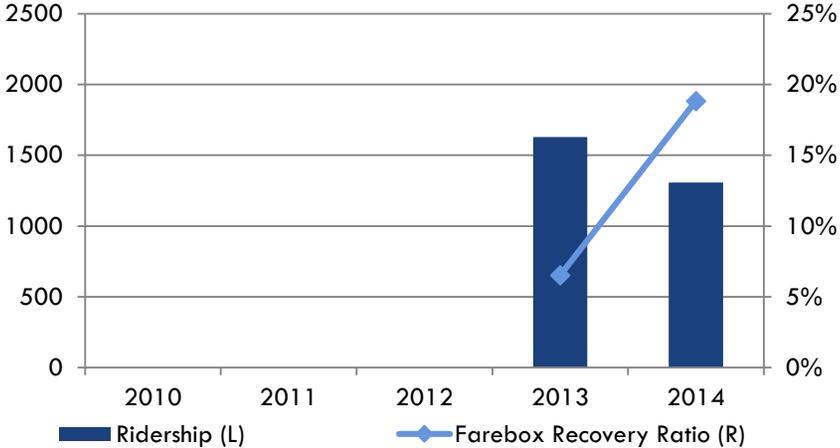


Figure 3: Ridership and Farebox Revenue

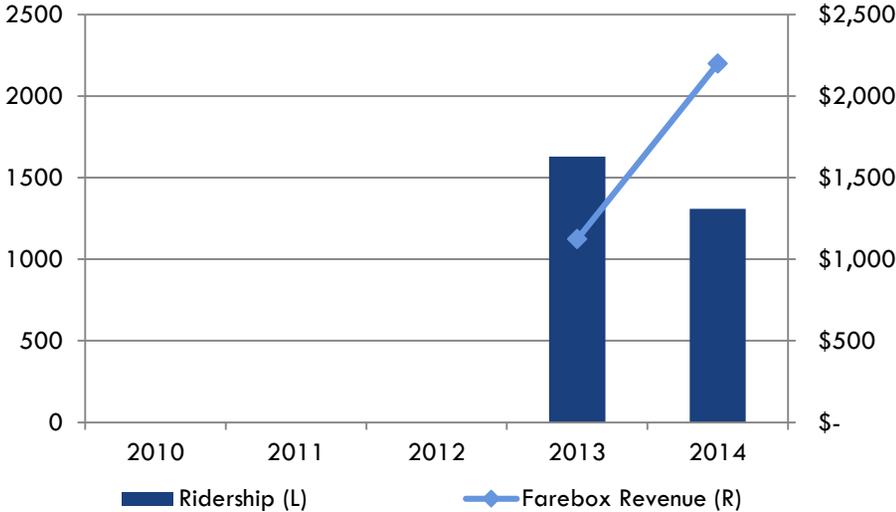




Figure 4: Performance Measures for Transit Operations

Service Type	Fiscal Year	Ridership	Revenue Hours	Revenue Miles	Operating Cost per Revenue Hr	Operating Cost per Passenger	Farebox Recovery Ratio	Passengers per Revenue Hr	Passengers per Revenue Mile	Subsidy per Passenger
Deviated Fixed Route	2009/10	No service								
	2010/11	No service								
	2011/12	No Service								
	2012/13	1,629	198	3,205	\$86.84	\$10.56	6.5%	8.2	0.5	9.9
	2013/14	1,308	492	8,658	\$23.73	\$8.93	18.8%	2.7	0.2	7.2

A challenging aspect of performance measurement data in rural communities is that transit systems cover large geographic areas with small populations and less dense land uses, which results in comparatively lower ridership and performance metrics. Additionally, to receive TDA operating funds above what was claimed the previous fiscal year, the claimant must have met at least two of the three performance objectives at the end of the third year, in compliance with the previous three-year Transit Systems Performance Objective established by the COG Board.

Furthermore, changes to ridership or costs will be more dramatic as a percentage change when looking for trends, as relatively small changes in any one ingredient in the metric can have substantial results when the metric is calculated. During the recent five-year period, many transit agencies have also been challenged by economic conditions during the recession, affecting ridership, costs, and funding. As a result of all of these conditions, over the past five years Ripon's Blossom Express has experienced fluctuations in performance and the metrics that track such performance. This is further complicated by a shift in the way the types of service metrics have been collected during this timeframe. When combined, it appears that ridership peaked in 2012/13, with a sharp decrease in more recent years. This has led to a decrease in other metrics, such as Passengers per Hour, and a decrease in Subsidy per Passenger. In 2013/14, we see a shift to restoring additional service, however this has not yet translated into an upward trend in these key performance metrics. It may take some time to see a recovery for transit operations in this particular market.

### Anticipated Funding Picture

The City of Ripon receives funding from local, state, regional and federal sources for transit purposes. Specifically, Ripon makes use of the funding sources listed in Figure 5 below.

Over the Systems Plan years, the City of Ripon intends to slowly expand their transit system, improve bus shelters and bus facilities, construct a bus maintenance facility, construct a downtown multi-modal station, and continue its base operations. Based on a combination of data provided in the City of Ripon SRTP and information provided by Ripon staff, funding assumptions for foreseeable capital projects and related operating costs, the costs associated with the continued operation of existing services, and anticipated revenue available to fund these projects and operations are summarized in Tables 5 and 6. Details related to specific planned expenditures are described below:

- **Fleet Expansion** – The City of Ripon plans to purchase a second bus for the Blossom Express service in FY 17/18. Funding will be provided by FTA 5307 and LTF funds through the City of Modesto. A third bus would be purchased in FY 19/20, and a fourth in FY 21/22. At this time, the purchase of the third and fourth vehicles is unfunded.
- **Fleet Replacement** – The City of Ripon plans to purchase a second bus for the Blossom Express service in FY 18/19. At this time, the purchase of this vehicle is unfunded.



- **CNG Expansion and Bus Shelters Improvements**– improvements to the city's CNG fueling facility and bus shelters will funded by Proposition 1B TSSSDRA funds in FY 17/18. It should be noted that TSSSDRA funding for FY 14/15, FY 15/16, and FY 16/17 has not yet been distributed. Funding received by the City of Ripon may not match project costs, as such, revenues to match project costs are not included in Figure 7.

Additional unfunded capital projects include the following:

- **Ripon Multi-modal Station** - The City of Ripon is seeking funding to secure the right of way for a future downtown multi-modal station (\$400,000) and complete the Preliminary Engineering (\$80,000) for the construction of a 7,000 square foot multi-modal station that will include: 152 off-street parking spaces, a bus loading and staging area, and a future rail platform for the ACE train. This project is estimated to have a total project cost of approximately \$5.8 million, however no funding has been identified.
- **Bus Maintenance Facility** – this project would construct a bus maintenance facility near the City of Ripon's existing CNG fueling facility. This facility should include a maintenance bay equipped with a vehicle-lift and drop pit; room for storing specialized equipment for maintaining transit vehicles, and storage space for spare bus parts. This project estimated to cost approximately \$3,000,000, however no funding or schedule has been identified and as such it is not included in Table 5.
- **Bus Stop Shelter Improvements** – this project would construct further passenger amenities at bus stops at a cost of \$391,000.

Figure 5: Transit Funding Sources

Local Funds & Fare Revenue	Regional & State Funds	Federal Funds
Passenger Fares	Measure K	FTA 5307
Annual Local Transportation Funds Operating Revenues (collected locally and redistributed by state)	Proposition 1B TSSSDRA, CalOES	-



Figure 6: Financial Summary for Transit Capital Projects

Capital Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
FTA 5307 (Modesto UZA)	\$0	\$391,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$391,000
FTA 5307 (Modesto UZA)	\$0	\$0	\$0	\$500,000	\$0	\$0	\$0	\$0	\$0	\$0	\$ 500,000
FTA 5307 (Manteca UZA)	\$0	\$236,288	\$243,376	\$250,678	\$258,198	\$265,944	\$273,922	\$282,140	\$290,604	\$299,322	\$ 2,400,472
Prop 1B (PTMISEA)	\$0	\$450,883	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 450,883
CalOES (TSSSDRA)	\$0	\$160,009	\$50,000	\$50,000	\$50,000	\$0	\$0	\$0	\$0	\$0	\$ 310,009
<b>Subtotal</b>		<b>\$1,238,180</b>	<b>\$293,376</b>	<b>\$800,678</b>	<b>\$308,198</b>	<b>\$265,944</b>	<b>\$273,922</b>	<b>\$282,140</b>	<b>\$290,604</b>	<b>\$299,322</b>	<b>\$4,052,364</b>
<b>Expenses:</b>											
Bus Purchase	\$0	\$0	\$0	\$500,000	\$300,000	\$500,000	\$0	\$500,000	\$0	\$500,000	\$ 2,300,000
CNG Expansion and Bus Shelter Project	\$0	\$500,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$ 500,000
Bus Stop Shelters	\$0	\$0	\$0	\$391,000	\$0	\$0	\$0	\$0	\$0	\$0	\$391,000
Maintenance Facility	\$0	\$0	\$0	\$0	\$0	\$3,000,000	\$0	\$0	\$0	\$0	\$ 3,000,000
Multi-Modal Station	\$0	\$0	\$0	\$80,000	\$0	\$400,000	\$5,320,000	\$0	\$0	\$0	\$ 5,800,000
<b>Subtotal</b>		<b>\$500,000</b>	<b>\$0</b>	<b>\$971,000</b>	<b>\$300,000</b>	<b>\$3,900,000</b>	<b>\$5,320,000</b>	<b>\$500,000</b>	<b>\$0</b>	<b>\$500,000</b>	<b>\$ 11,991,000</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>		<b>\$738,180</b>	<b>\$293,376</b>	<b>(\$170,322)</b>	<b>\$8,198</b>	<b>(\$3,634,056)</b>	<b>(\$5,046,078)</b>	<b>(\$217,860)</b>	<b>\$290,604</b>	<b>(\$200,678)</b>	<b>(\$7,938,636)</b>

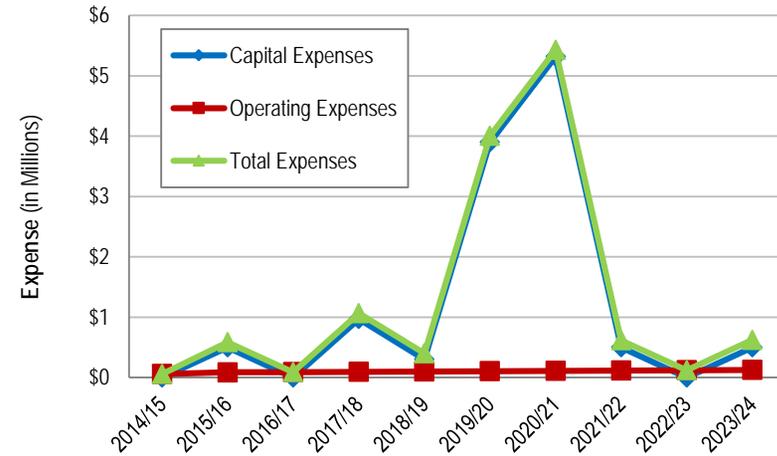
Figure 7: Financial Summary for Transit Operations

Operating Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
Fare Revenue - Blossom Express	\$1,582	\$3,225	\$4,249	\$5,440	\$6,551	\$8,114	\$10,572	\$11,035	\$11,519	\$12,024	\$74,311
Fare Revenue - DAR Passenger Van	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$10,000
Measure K Sales Tax	\$50,000	\$76,797	\$80,171	\$83,687	\$87,351	\$91,169	\$95,148	\$99,318	\$103,670	\$108,213	\$875,524
TDA - STA Revenue	\$5,058	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$ 50,058
<b>Subtotal</b>	<b>\$57,640</b>	<b>\$86,022</b>	<b>\$90,420</b>	<b>\$95,127</b>	<b>\$99,902</b>	<b>\$105,283</b>	<b>\$111,720</b>	<b>\$116,353</b>	<b>\$121,189</b>	<b>\$126,237</b>	<b>\$1,009,893</b>
<b>Expenses:</b>											
Operating Costs -- Blossom Express	\$51,582	\$80,022	\$84,420	\$89,127	\$93,902	\$99,283	\$105,720	\$110,353	\$115,189	\$120,237	\$949,835
Operating Costs -- DAR Passenger Van	\$6,058	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$6,000	\$60,058
<b>Subtotal</b>	<b>\$57,640</b>	<b>\$86,022</b>	<b>\$90,420</b>	<b>\$95,127</b>	<b>\$99,902</b>	<b>\$105,283</b>	<b>\$111,720</b>	<b>\$116,353</b>	<b>\$121,189</b>	<b>\$126,237</b>	<b>\$1,009,893</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>



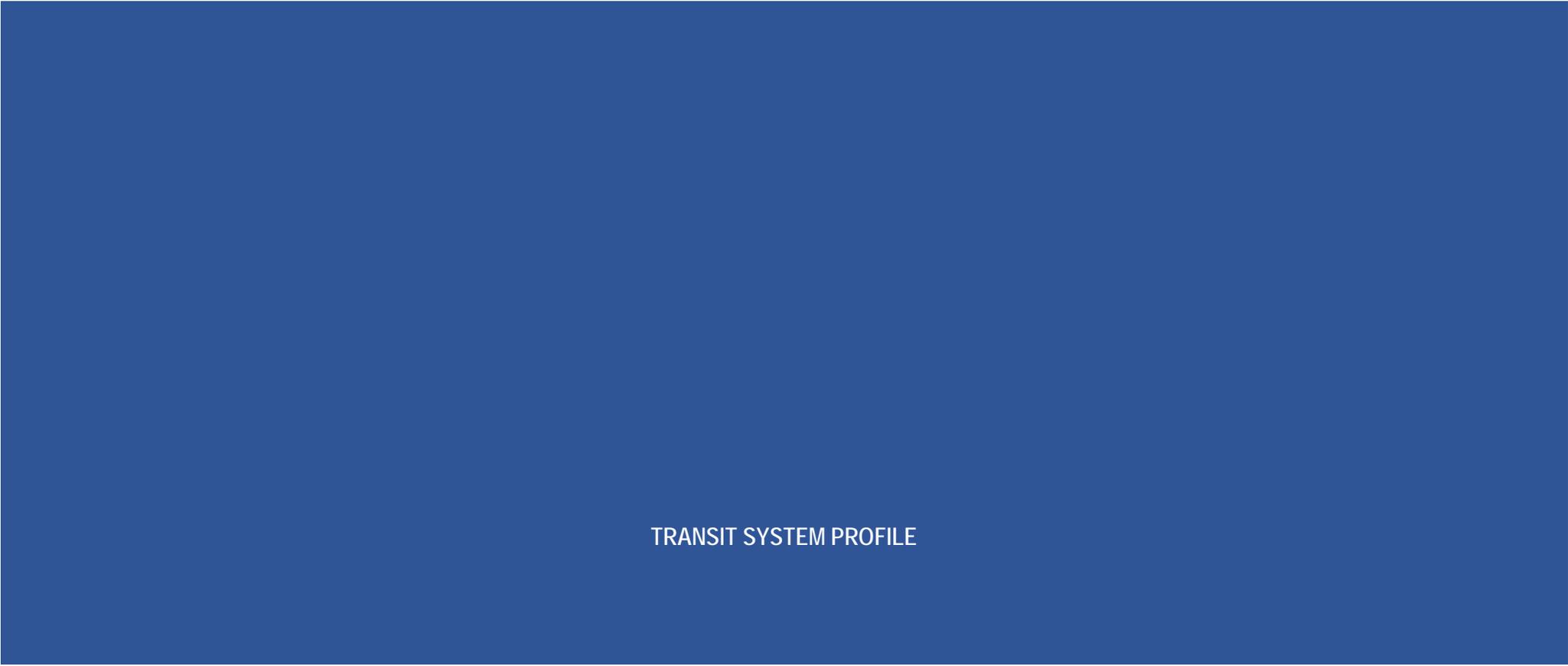
The City of Ripon's operating and capital expenses related to transit are presented in Tables 5 and 6. As shown, capital costs range from as low as \$300,000 in FY 18/19 to as high as \$5,320,000 in FY 20/21. Specifically, it should be noted that Ripon's "CNG Expansion and Bus Shelter Project" currently has \$118,000 in unfunded need. Similarly, the City of Ripon's "Multi-modal Station" project currently does not have an assigned funding source. The City of Ripon's "Bus Purchase" in FY 17/18 is fully funded by FTA 5307 and LTF funds. Overall, Figure 6 indicates a shortfall of nearly \$8M currently exists with respect to capital expenditures.

Figure 8: Transit Operating and Capital Expenses





## 8 CITY OF TRACY – TRACY TRACER



TRANSIT SYSTEM PROFILE



## CITY OF TRACY — TRACY TRACER

Located in southwestern San Joaquin County, the City of Tracy had a population of approximately 82,923 people, per the 2010 United States Census. Of this population, 6.9% were elderly, 32.2% were youths, 8.2% were low-income. These segments of the population tend to be most dependent on transit service. Systemwide ridership in FY 2012/13 on all transit services was 128,664 one-way passenger trips, an increase of 36% over Fiscal Year 2011. The median household income is \$76,098.

### Transit System at a Glance

Tracy offers fixed-route, door-to-door paratransit services, and subsidized taxi ADA service. Fixed-route service in the City of Tracy is operated primarily by Tracy TRACER, with more regional connections available through RTD, and the Altamont Corridor Express.

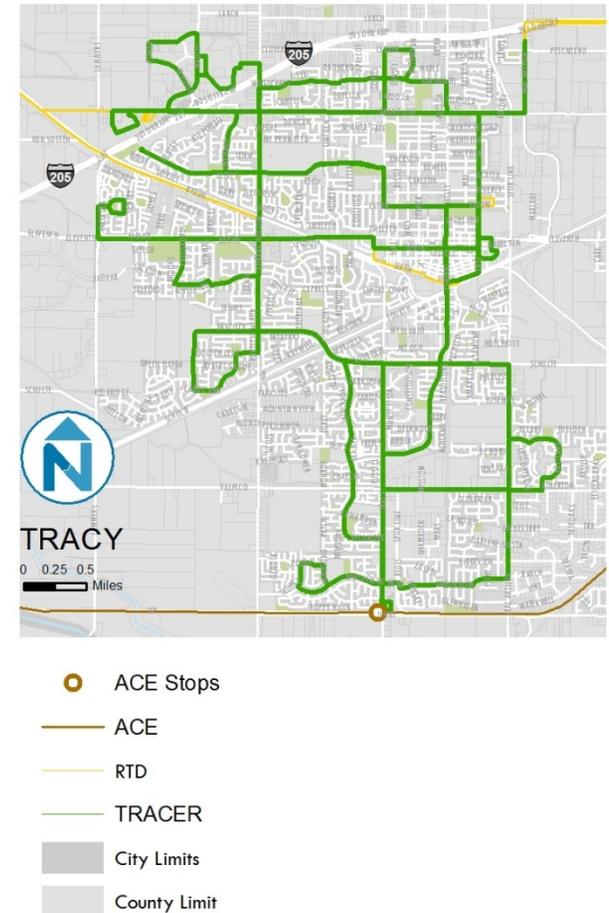
Existing local fixed-route services include four weekday routes offered between 7:00 am to 8:00 pm. There are also two commuter routes that operate during peak times of the morning and afternoon. Those routes run as early as 6:30 am, but end by 5:10 pm. Saturday service operates between 9:00 am and approximately 7:00 pm. No service is available on Sundays. The general fee for fixed-route service is \$1.25 per trip, while seniors pay \$0.50 per trip, and students pay \$1.00. Transfers are free for an hour.

Dial-A-Ride paratransit door-to-door service is offered within the city limits to ADA/Medicare passengers, and Tracy residents age 65 and older. The service operates between 7:00 am and 7:00 pm Monday through Friday, and from 9:00 am to 5:00 pm on Saturdays. Reservations must be made Monday through Friday between 8 am and 6 pm. Registered paratransit riders are also eligible for subsidized taxi service, which is available when the regular paratransit service is not running. Eligible riders can purchase \$20 worth of taxi coupons for \$10.

Systemwide ridership in 2013 on all TRACER services was 128,664 passenger trips, an increase of 17.3% percent over 2012. Fixed route ridership increased 35.4% between 2012 and 2014, perhaps due in part to improvement in the regional economic recovery. In 2013, 88.4% of ridership was carried on the fixed route lines, with fixed-route representing 69.8% of revenue hours and 73.9% of revenue-miles. Fixed route ridership has increased since 2011, with a peak of 124,159 passenger trips in 2014.

San Joaquin RTD also provides intercity fixed route service in Tracy via the Hopper routes 90 and 97. Route 90 terminates at the Tracy Wal-Mart, and route 97 terminates at the Tracy Transit Center. Both travel to Stockton via Lathrop. General fares on Hopper routes are \$1.50, with discount fares at \$0.75 per one-way trip. The Altamont Corridor Express offers rail connections to Stockton to the north and San Jose to the south. The Tracy ACE station has the second highest boardings in the system. Ticket prices vary by destination, but a one-way ticket to Stockton is \$5.50, and \$10.25 to San Jose.

Figure 1: Tracy TRACER Service Area





## Performance Measures

The following section describes a set of performance measures for Tracy TRACER, with more detail on measures in a separate chapter. Subsidy per Passenger and Farebox Revenue are shown in Figures 2 and 3 respectively with a year-by-year summary of other metrics in Figure 4.

Figure 2: Ridership and Subsidy per Passenger

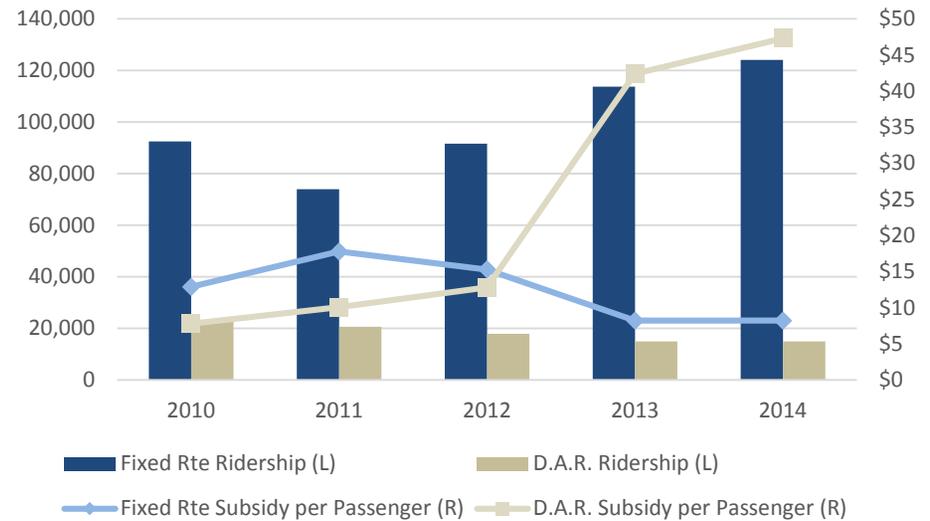


Figure 3: Ridership and Farebox Receipts

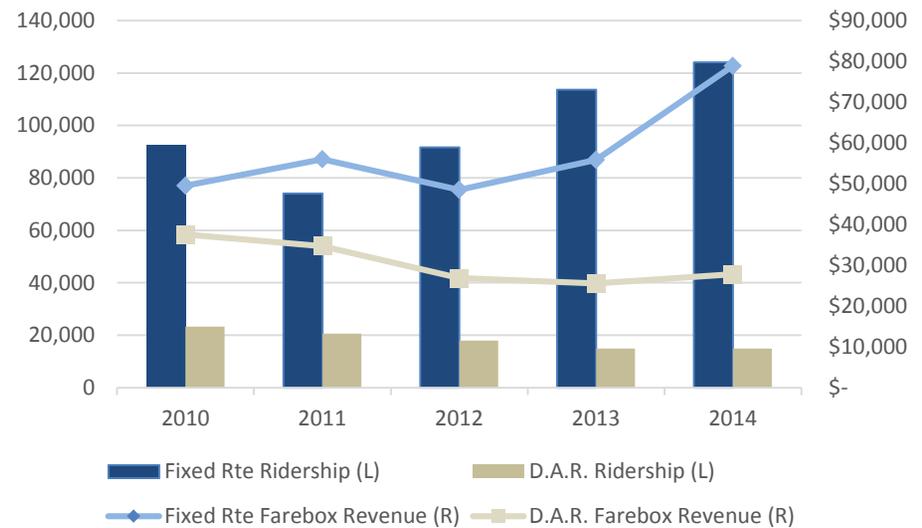




Figure 4: Performance Measures for Transit Operations — By Mode

Service Type	Fiscal Year	Ridership	Revenue Hours	Revenue Miles	Operating Cost per Revenue Hr	Operating Cost per Passenger	Farebox Recovery Ratio	Passengers per Revenue Hr	Passengers per Revenue Mile	Subsidy per Passenger
Fixed Route	2009/10	92,536	11,974	158,211	\$103.76	\$13.43	4.0%	7.7	0.6	\$12.90
	2010/11	74,006	12,909	152,284	\$106.39	\$18.56	4.1%	5.7	0.5	\$17.80
	2011/12	91,703	12,886	149,017	\$112.61	\$15.82	3.3%	7.1	0.6	\$15.30
	2012/13	113,709	15,723	201,764	\$62.97	\$8.71	5.6%	7.2	0.6	\$8.22
	2013/14	124,159	15,882	206,079	\$69.34	\$8.87	7.2%	7.8	0.6	\$8.23
Dial-A-Ride	2009/10	23,265	7,030	80,699	\$31.19	\$9.42	17.1%	3.3	0.3	\$7.80
	2010/11	20,593	6,892	75,737	\$35.17	\$11.77	14.3%	3.0	0.3	\$10.80
	2011/12	17,942	7,305	77,737	\$35.19	\$14.33	10.4%	2.5	0.2	\$12.82
	2012/13	14,955	6,803	71,323	\$97.02	\$44.13	3.9%	2.2	0.2	\$42.41
	2013/14	14,939	6,742	68,994	\$108.99	\$49.19	3.8%	2.2	0.2	\$47.32

Sources: Triennial Performance Audit of City of Tracy Transit Services -FYs 2010-2012, 2013 NTD, 2014 NTD

Figure 5 adds the data supplied to the National Transit Database (NTD) for years 2013 and 2014 to the measures shown in Figure 4. The modal breakdown for NTD reporting for operating expenses is a formula showing Dial-a-Ride total operating costs to be 40% of all reported service. A Triennial Audit for years 2013 – 2015 is expected to be completed in August 2016, which should provide more accurate information, and be more comparable to earlier data.

Figure 5: Performance Measures for Transit Operations — Systemwide

Service Type	Fiscal Year	Ridership	Revenue Hours	Revenue Miles	Operating Cost per Revenue Hr	Operating Cost per Passenger	Farebox Recovery Ratio	Passengers per Revenue Hr	Passengers per Revenue Mile	Subsidy per Passenger
Systemwide	2009/10	115,801	19,004	238,910	\$76.92	\$12.62	6.0%	6.1	0.5	\$11.87
	2010/11	94,599	19,801	227,743	\$81.60	\$17.08	5.6%	4.8	0.4	\$16.12
	2011/12	109,645	20,191	226,754	\$84.60	\$15.58	4.4%	5.4	0.5	\$14.89
	2012/13	128,664	22,526	273,087	\$73.25	\$12.82	4.9%	5.7	0.5	\$12.19
	2013/14	139,098	22,624	275,073	\$81.15	\$13.20	5.8%	6.1	0.5	\$12.43

Sources: Triennial Performance Audit of City of Tracy Transit Services -FYs 2010-2012, 2013 NTD, 2014 NTD

A challenging aspect of performance measurement data in rural communities is that transit systems cover large geographic areas with small populations and less dense land uses, which results in comparatively lower ridership and performance metrics. As a small transit provider, Tracy is not held to the 20% farebox recovery ratio required of larger transit operators in urbanized areas.



During the recent five-year period, many transit agencies have also been challenged by economic conditions during the recession, affecting ridership, costs, and funding. As a result of all of these conditions, over the past five years Tracy's fixed-route cost per revenue hour, cost per passenger, farebox recovery ratio, and passenger per hour have been not been consistent, although ridership has been trending upward since 2012. Generally increasing fixed-route ridership coupled with a lower dial-a-ride ridership means more people are able to utilize the fixed-route service. But in the case of Tracy, the decrease in Dial-A-Ride ridership is larger than that of the gains for fixed-route. Dial-a-Ride is also typically more expensive to provide than fixed-route service due to its unpredictability and door-to-door service, yet this is only observed in 2013 and 2014.

## Anticipated Funding Picture

Tracy TRACER is in the process of updating its SRTP; information in the following section is subject to change based on the results of the completed SRTP. Over the next ten years, Tracy intends to continue its bus replacement program, add wi-fi on buses, improve bus stop facilities, continue its base operations, and finish a short range transit plan. Based on a combination of data provided in Tracy's annual budgets, funding assumptions for foreseeable capital projects and related operating costs, the costs associated with the continued operation of existing services, and anticipated revenue available to fund these projects and operations are summarized in Figure 6 and 7. Details related to specific planned expenditures are described below:

- **Bus Replacement** – Tracy intends to purchase replacements for its existing fixed-route and paratransit fleet, including purchases in three of the next four years using FTA grant and City of Tracy funds for capital projects.
- **Bus Stop Improvements** – for Phase 3 are intended to occur in FY 2017/18, FY 2021/22, and FY 2023/24 using FTA grant and City of Tracy funds for transit capital projects.
- **Wi-Fi on Buses** – TRACER buses are slated to get Wi-Fi access in FY 2019/20 using local transit capital funds from the city.
- **Planning** – Funds for a Short Range Transit Plan for FY 2015/16 and FY 2019/20 to be paid for with FTA grant and City of Tracy funds for capital projects.

Figure 6: Transit Funding Sources

Local Funds & Fare Revenue	Regional & State Funds	Federal Funds
Passenger Fares		FTA 5307
Annual Local Transportation Funds Operating Revenues (collected locally and redistributed by state)	TDA - STA	CMAQ
		FTA 5307-Capital

Based on the information provided in Figure 7, the costs associated with planned capital projects for the City of Tracy will not exceed their anticipated funding amount over a ten year period. Based on the information provided in Figure 8, if operating grants are received at the time and pace projected, operating revenue for TRACER would keep pace with expected costs through the end of the ten-year period.



Figure 7: Financial Summary for Transit Capital Projects

Capital Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
TDA-LTF		\$560,000	\$270,000	\$300,000	\$300,000	\$60,000	\$60,000	\$25,000	\$240,000	\$300,000	\$2,115,000
FTA 5307		\$2,240,000	\$1,080,000	\$1,200,000	\$1,200,000	\$240,000	\$240,000	\$100,000	\$960,000	\$1,200,000	\$8,460,000
<i>Subtotal</i>	<i>\$0</i>	<i>\$2,800,000</i>	<i>\$1,350,000</i>	<i>\$1,500,000</i>	<i>\$1,500,000</i>	<i>\$300,000</i>	<i>\$300,000</i>	<i>\$125,000</i>	<i>\$1,200,000</i>	<i>\$1,500,000</i>	<i>\$10,575,000</i>
<b>Expenses:</b>											
Planning - SRTP			\$125,000					\$125,000			\$250,000
Bus Replacement		\$2,800,000	\$1,225,000	\$1,200,000					\$1,200,000		\$6,425,000
Bus Stop Improvements					\$1,500,000					\$1,500,000	\$3,000,000
Technology Enhancements				\$300,000		\$300,000	\$300,000				\$900,000
<i>Subtotal</i>	<i>\$0</i>	<i>\$2,800,000</i>	<i>\$1,350,000</i>	<i>\$1,500,000</i>	<i>\$1,500,000</i>	<i>\$300,000</i>	<i>\$300,000</i>	<i>\$125,000</i>	<i>\$1,200,000</i>	<i>\$1,500,000</i>	<i>\$10,575,000</i>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

Source: Tracy Budgets, 2010 – 2012 FTA Triennial Review



Figure 8: Financial Summary for Transit Operations

Operating Projects	FY 14/15	FY 15/16	FY 16/17	FY 17/18	FY 18/19	FY 19/20	FY 20/21	FY 21/22	FY 22/23	FY 23/24	Total
<b>Revenue:</b>											
TDA - LTF	\$1,023,891	\$1,195,000	\$2,032,500	\$2,085,000	\$2,125,000	\$2,140,000	\$2,167,500	\$2,207,500	\$2,235,000	\$2,300,000	\$19,511,391
TDA - STA		\$80,000	\$80,000	\$80,000	\$80,000	\$80,000	\$80,000	\$80,000	\$80,000	\$80,000	\$720,000
FTA 5307	\$955,000	\$950,000	\$1,142,500	\$1,205,000	\$1,255,000	\$1,280,000	\$1,317,500	\$1,367,500	\$1,405,000	\$1,480,000	\$12,357,500
Passenger Fares	\$150,000	\$110,000	\$120,000	\$130,000	\$140,000	\$150,000	\$160,000	\$170,000	\$180,000	\$190,000	\$1,500,000
Rental Income		\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000	\$450,000
<b>Subtotal</b>	<b>\$2,128,891</b>	<b>\$2,385,000</b>	<b>\$3,425,000</b>	<b>\$3,550,000</b>	<b>\$3,650,000</b>	<b>\$3,700,000</b>	<b>\$3,775,000</b>	<b>\$3,875,000</b>	<b>\$3,950,000</b>	<b>\$4,100,000</b>	<b>\$34,538,891</b>
<b>Expenses:</b>											
Contracted Services	\$1,240,863	\$1,485,000	\$2,500,000	\$2,600,000	\$2,675,000	\$2,700,000	\$2,750,000	\$2,800,000	\$2,850,000	\$2,900,000	\$24,500,863
Administrative Costs	\$888,028	\$900,000	\$925,000	\$950,000	\$975,000	\$1,000,000	\$1,025,000	\$1,075,000	\$1,100,000	\$1,200,000	\$10,038,028
<b>Subtotal</b>	<b>\$2,128,891</b>	<b>\$2,385,000</b>	<b>\$3,425,000</b>	<b>\$3,550,000</b>	<b>\$3,650,000</b>	<b>\$3,700,000</b>	<b>\$3,775,000</b>	<b>\$3,875,000</b>	<b>\$3,950,000</b>	<b>\$4,100,000</b>	<b>\$34,538,891</b>
<b>Funding Shortfall / Surplus:</b>											
<b>Total</b>	<b>\$0</b>										

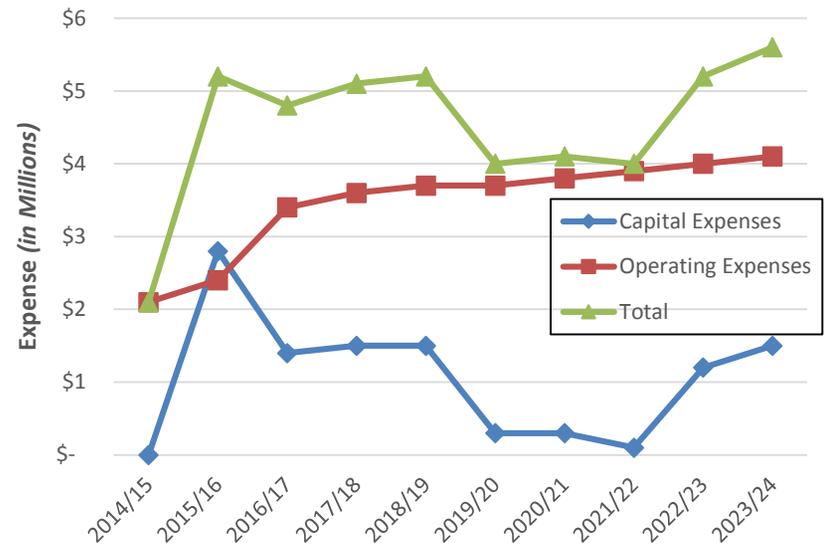
Source: Tracy Budgets, 2010 -2012 FTA Triennial Review



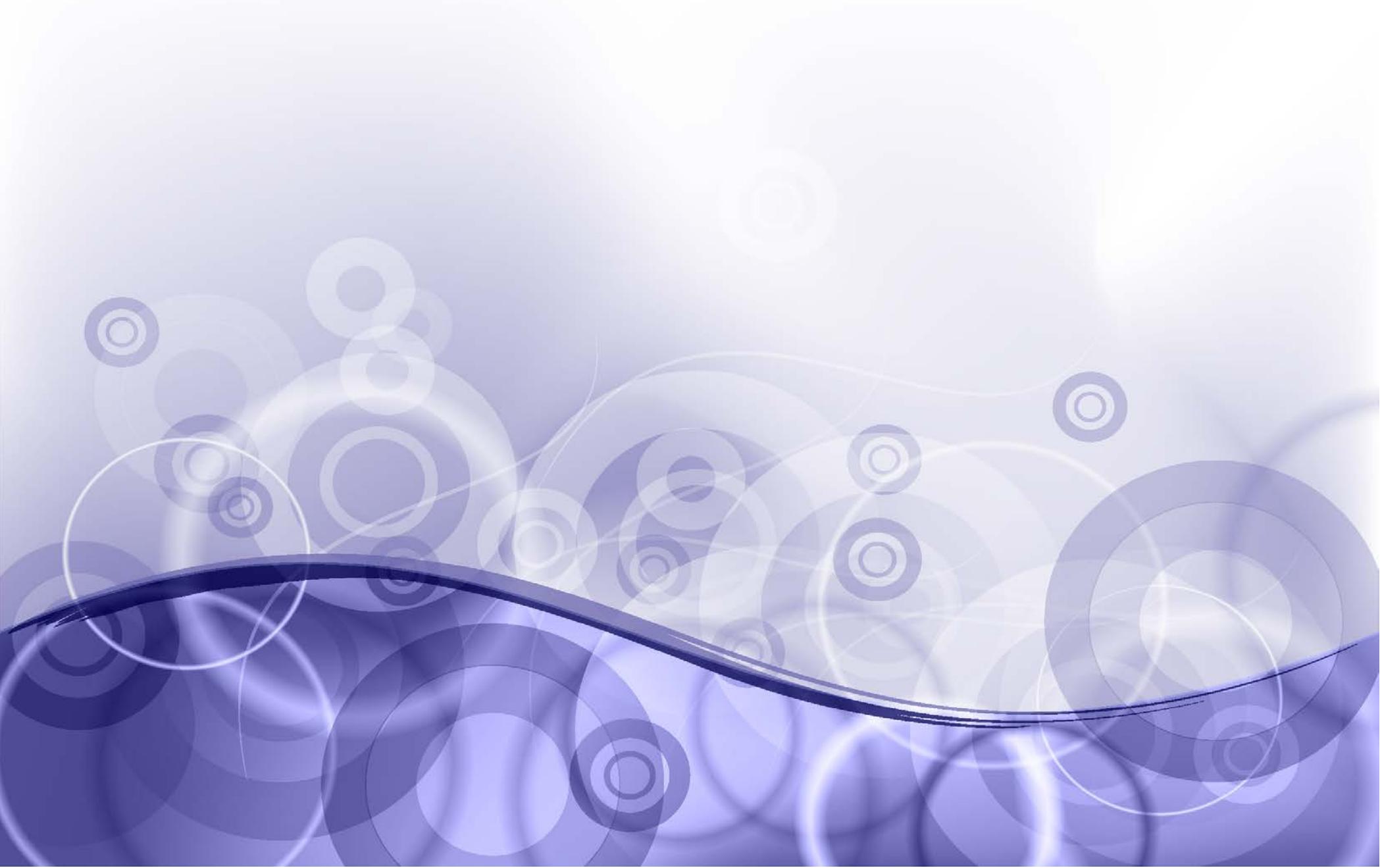
Tracy TRACER's transit operating and capital expenses are presented graphically to the right in Figure 9. As shown, capital costs range from as low as \$0 in FY 2014/15 to as high as \$2,800,000 in FY 2015/16. The major spike in capital expenditures is attributed to bus replacements. Apart from that year, ongoing capital expenses remain below \$2 million annually, and are mostly resulting from fleet replacement and bus stop improvements.

Operating costs are higher than capital costs, but are also relatively stable until FY 2016/17, when enhanced operations are expected to begin. Although that full amount is not likely to be used all in that year that is all the information that is known at this time about additional service. Additionally, operating expenses are expected to increase annually at a rate of 3%, which is consistent with growth rates for operating expenses of comparable transit agencies within this geographic area.

Figure 9: Transit Operating and Capital Expenses



# THE REGIONAL FUNDING FUTURE





## 1 The Transit Funding Picture

There are many considerations in financing the regional public transit system. First, it involves setting priorities for how existing funds (for capital and operations) are spent. Second, it requires taking a hard look at the financial reality where anticipated revenue cannot keep pace with the transit demand. Third, it must include strategies to increase revenue available (through fares, as an example) and to decrease operating costs. Fourth, funding must include examination of creative or innovative options to move people in ways (other than transit) that can complement the service or be a cost-effective alternative that substitutes for transit service.

The previous chapter of the Systems Plan captures the long range outlook of the operators related to the growth and expansion of the transit service, including capital costs such as vehicle expansion or replacement, new or enhanced transit stations, passenger amendments, and expanded transit operations. As stated earlier in the Systems Plan, transit operators were asked to identify service (for the Plan) they believed could be delivered within the operator's own projected funding. Oftentimes, this required some operators, particularly San Joaquin Regional Transit District and the San Joaquin Regional Rail Commission, to scale back service expansions and related capital investments significantly—in essence, creating a “bare bones” service—that, according to these operators, will not keep pace with transit travel demand in the San Joaquin region. It also required the operators to identify fare increases in order to generate revenue for the transit system. Even with this minimal level of service growth reported, the finding from the Systems Plan is that there simply is not enough state and federal revenue to fully finance this system.

The San Joaquin Council of Governments has prepared its own financial analysis of the public transportation improvements. This chapter provides a revenue forecast through Fiscal Year 2024 of reasonably expected to be available federal, state, and local revenue. The revenue projection relies on historical patterns of funding, assumptions about future conditions, and preliminary assumptions about how some discretionary revenues will be allocated to different operators.

*The Systems Plan assumes \$1.02 billion in projected revenues to support the \$1.21 billion in public transportation needs through the planning period. On a regional level, there is a \$190 million shortfall for public transportation. Of the total revenues available (in SJCOG estimate), \$123 million in funds are allocated at the discretion of SJCOG.*

Figure C1: Projected Systems Plan Revenue and Costs



Source: SJCOG



For the purposes of the Systems Plan, some discretionary revenues have been provisionally allocated by mode based on recent funding patterns, with all rail mode funds flowing to SJRRC.

When taking this provisional allocation into account, \$954 million of the \$1.02 billion in regional revenue sources are assumed to be available for the use of individual operators. The remaining \$69 million in regional revenues are either allocated at the discretion of other agencies outside San Joaquin County, or they are derived from a source that does not have a provisional sub-allocation at this time.

It is critical to place these figures in the appropriate context. The shortfall must therefore be qualified to emphasize that it represents a transit system cost that is not as robust as many operators feel is needed. In addition, this chapter will highlight that shortfalls in funding are disproportionately spread on an operator-by-operator basis—specifically, some operators have severe shortfalls while others have systems that may be possibly funded within the financial forecast.

*It should be noted that the \$190 million difference that exists between projected expenses and total available revenues is calculated on an overall basis, across all operators and revenue sources in the County. However, this shortfall affects some transit operators more than others.*

Analysis conducted for the Systems Plan suggests that there are several mismatches between the capital and operating needs of different operators and the designated recipients for one or more revenue sources. This chapter goes into further detail about the complexity of Paying for the Plan.

Figure C2: Systems Plan Funding Challenges



Source: SJCOG



## 2 SJCOC Estimate of Available Funding

Funding for an array of multimodal transportation improvements in San Joaquin County comes from many different sources, including programs administered at the federal, state, regional, and local level.

Figure C3: Sources of Public Transportation Funds

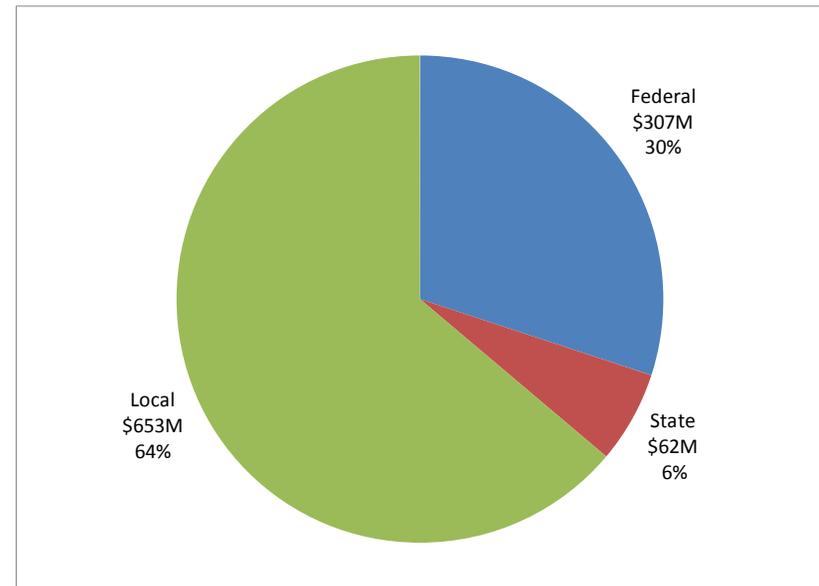


Source: SJCOC

This section describes the various funding programs that support transit in the County and provides the SJCOC staff estimate of the amount of revenues expected to be available in each program over the ten-year Systems Plan period. Graphs and charts throughout the section illustrate revenue breakdowns based on a combination of

existing regulations, adopted policy guidance, and preliminary assumptions about future revenue allocations. Overall, a total of \$1.02 billion in revenue is expected to be available to support transit within San Joaquin County over the Systems Plan period through 2024. As shown in Figure C4, this is composed of \$307 million in federal sources, \$62 million in state sources, and \$653 million in locally-generated sources. Each category is discussed within the following sections.

Figure C4: Funding Estimate Summary for Systems Plan (FY2015 to FY2024)



Source: SJCOC staff analysis



Depending on the revenue source, funding available in the Systems Plan is allocated to recipients by one of several different mechanisms. Regardless of whether the funds are from federal, state, or local sources, they can be grouped into three categories depending on how the funds flow down to the local transit operators:

- » **Direct-Award Sources** are those where the original funding agency specifies the final recipient. SJCOC may pass through the funding to the jurisdictions, but does not otherwise participate in determining the timing or amount of funding. The most typical example of this funding type are the FTA formula programs, such as Section 5337 Fixed Guideway Modernization. Certain discretionary programs outside of San Joaquin County are also directly-awarded, such as project-specific grants from the FTA 5310 and California Proposition 1B programs.
- » **Sub-Allocated Sources** are those in which SJCOC implements an established formula or a Board-adopted policy to allocate funds to the local jurisdictions, often using external guidance. Examples include TDA-STA, GGRF-LCTOP, TDA-LTF, and Measure K.

- » **Discretionary Sources** are those that do not currently have a formal policy in place to distribute funds to the ultimate recipient. Funds may be assigned to categories by mode or purpose, but SJCOC makes the determination of how to distribute funding to best meet local needs. Examples include RTIF and CMAQ. Because funding categories typically focus on different transit modes, some revenues that are formally “discretionary” sources have been provisionally allocated to bus or rail for the Systems Plan analysis.

This classification will be used throughout the chapter to highlight the degree to which different funding sources could be redirected to satisfy anticipated capital and operating needs.

## 2.1 Federal Funding Sources

The primary sources of federal funding are various FTA apportionments and FHWA’s Congestion Management and Air Quality (CMAQ) program. Table C1 presents the name and the permitted uses of each of these sources, according to the structure in the most recent surface transportation authorization, the 2015 Fixing America’s Surface Transportation Act (“FAST-Act”)<sup>1</sup>. The table also shows which modes the funds can be applied towards in San Joaquin County, based on the current transit service network. Additional information about federal funding programs for transit is included in Appendix B.

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<sup>1</sup> The FAST-Act is the most recent federal authorization of surface transportation funding. This five-year bill retains much of the program structure of the previous authorization, the 2012 Moving Ahead for Progress in the 21st Century Act (“MAP-21”), with relatively minor changes to funding levels and programmatic eligibility.



**Table C1: List of Federal Funding Programs for Systems Plan**

FAST-Act Program Name	Permitted Uses		Eligible Modes	
	Capital	Operating	Bus	Rail
FTA Section 5307 Urbanized Area (*)	✓	(✓)	✓	✓
FTA Section 5310 Enhanced Mobility for Seniors and Individuals w/ Disabilities	✓	✓	✓	✓
FTA Section 5311 Rural Program	✓	✓	✓	
FTA Section 5337 State of Good Repair	✓			✓
FTA Section 5339 Bus and Bus Facilities	✓		✓	
Congestion Mitigation and Air Quality Program (CMAQ)	✓	✓	✓	✓

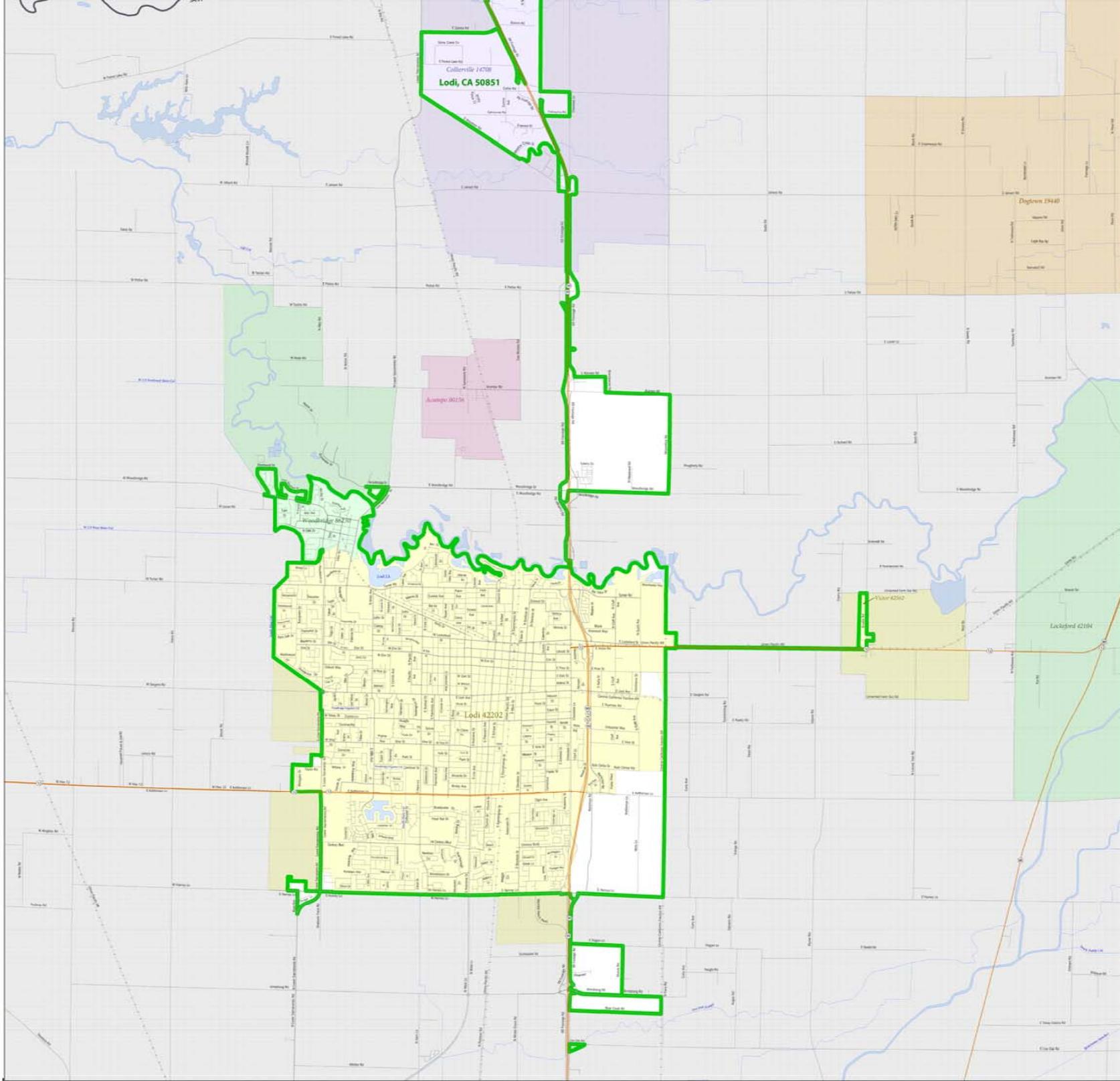
(\*) According to 49 USC 5307, transit providers serving urbanized areas with 200,000 residents or less may use funds from this program for operating assistance. Providers serving urbanized areas with over 200,000 residents typically cannot use these funds for operating assistance. Also, for CMAQ funds, roadway operational improvement projects are equally qualified for funding.

Source: SJCOG

Several of the FTA sources in Table C1 are apportioned to individual jurisdictions based, in part, on the relative populations of the Urbanized Areas (UZAs) located within San Joaquin County. Figure C5 shows the boundaries of the UZAs in San Joaquin County, as defined by the U.S. Census. There are four designated UZAs in San Joaquin County: Lodi, Manteca-Ripon, Stockton, and Tracy.

Except for Stockton, all UZAs in San Joaquin County are less than 200,000 in population; these smaller UZAs are permitted to use FTA 5307 funding on both capital and operating expenses. As shown in the figure, the UZA boundaries correspond to concentrations of population, rather than the service areas boundaries of individual transit operators. UZA recipients may choose to subdivide and/or transfer revenues to support the transit services that benefit their communities.

**Figure C5: 2010 Census Urbanized Area Boundaries in San Joaquin County (Maps for Lodi, Stockton, Manteca, and Tracy) as follows:**



Federal American Indian Reservation  
 L'ANSE RES 1880  
 T1880

Urbanized Area  
 L'ANSE RES 1880  
 T1880

Urban Cluster  
 T1880  
 T1880

State (or statistically independent entity)  
 NEW YORK 36

County (or statistically independent entity)  
 BRE 029

Minor Civil Division (MCD)<sup>1,2</sup>  
 Bristol town 07485

Consolidated City  
 MILFORD 47500

Incorporated Place<sup>1,3</sup>  
 Davis 18100

Census Designated Place (CDP)<sup>1</sup>  
 Incline Village 35100

DESCRIPTION	SYMBOL	DESCRIPTION	SYMBOL
Interstate		Water Body	
U.S. Highway		Alluvial	
State Highway		Channel Subject Area	
Other Road		Highway 66	
Arterial		Trailing 66	
Principal Street		Highway	
Secondary Street			

Where international, state, county, and/or MCD boundaries coincide, the map shows the boundary symbol for only the highest ranking of these boundaries.

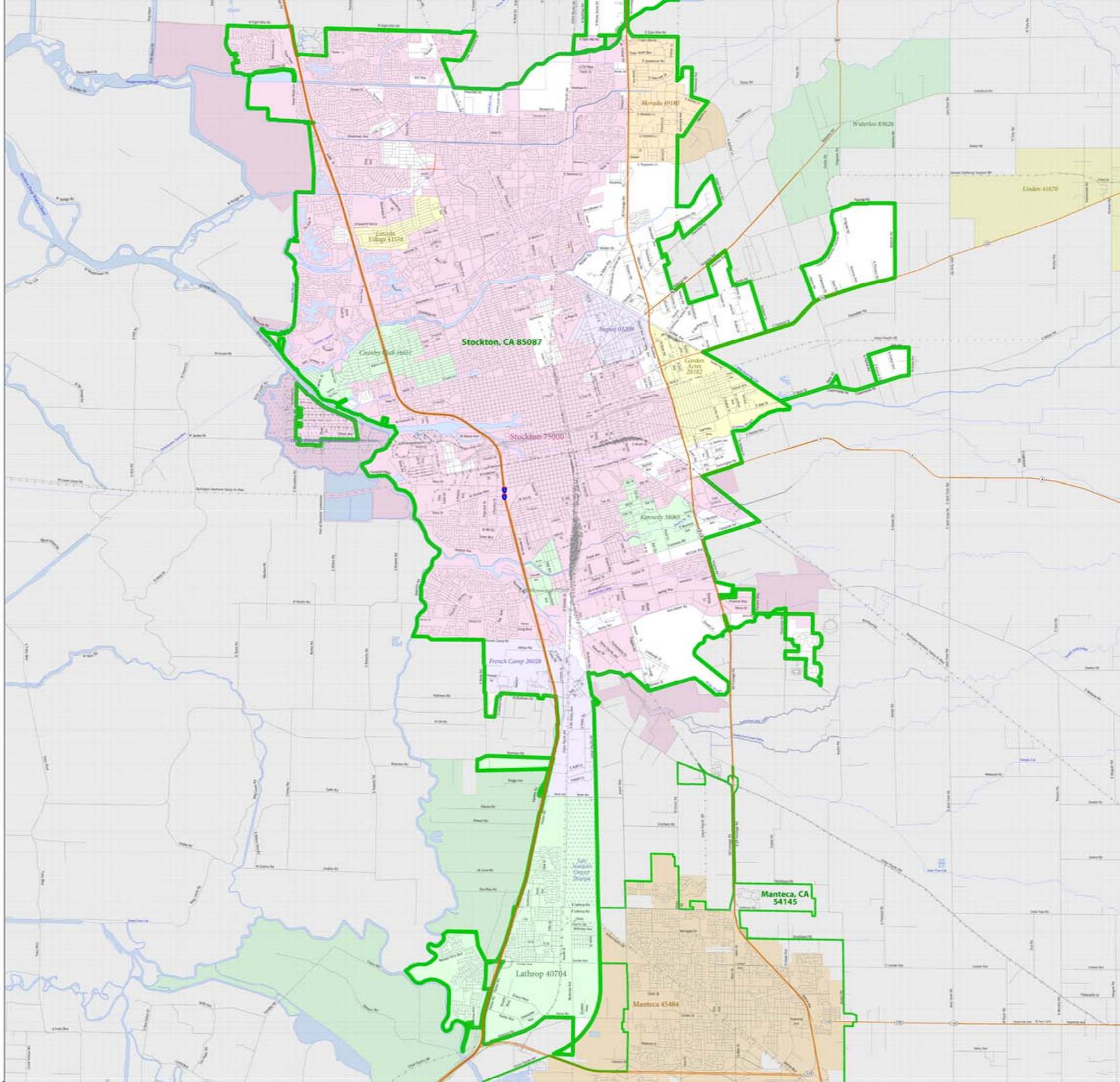
1 "A" following an MCD name denotes a false MCD. "A" following a place name indicates that a false MCD exists with the same name and FIPS code as the place; the false MCD label is not shown.

2 MCD boundaries are shown in the following states in which some or all MCDs function as general purpose governmental units: Connecticut, Illinois, Indiana, Kansas, Maine, Massachusetts, Michigan, Minnesota, Missouri, Nebraska, New Hampshire, New Jersey, New York, North Dakota, Ohio, Pennsylvania, Rhode Island, South Dakota, Vermont, and Wisconsin. Note that Illinois and Nebraska have some counties covered by non-governmental precincts and Missouri has most counties covered by non-governmental townships.

3 Place label color corresponds to the place fill color.  
 Label colors: Davis Davis Davis Davis Davis

**SUBJECT AREA COUNTIES ON MAP SHEET**  
 06077 San Joaquin

2010 Census:  
 Urbanized Area  
 Reference Map -  
 Lodi, CA



Urbanized Area		Dover, DE 24580
Urban Cluster		Toole, VT 88057
Place (or statistically independent entity)		NEW YORK 36
County (or statistically independent entity)		ERE 029
Minor Civil Division (MCD) <sup>1,2</sup>		Bristol town 07485
Consolidated City		MILFORD 47500
Incorporated Place <sup>1,3</sup>		Davis 18100
Census Designated Place (CDP) <sup>1,3</sup>		Incline Village 35100

DESCRIPTION	SYMBOL	DESCRIPTION	SYMBOL
International		Water Body	
U.S. Highway		Alluvium	
State Highway		Channel Subject Area	
Other Road			
Arterial			
Frontal Street			
Residential Street			

Where international, state, county, and/or MCD boundaries coincide, the map shows the boundary symbol for only the highest ranking of these boundaries.

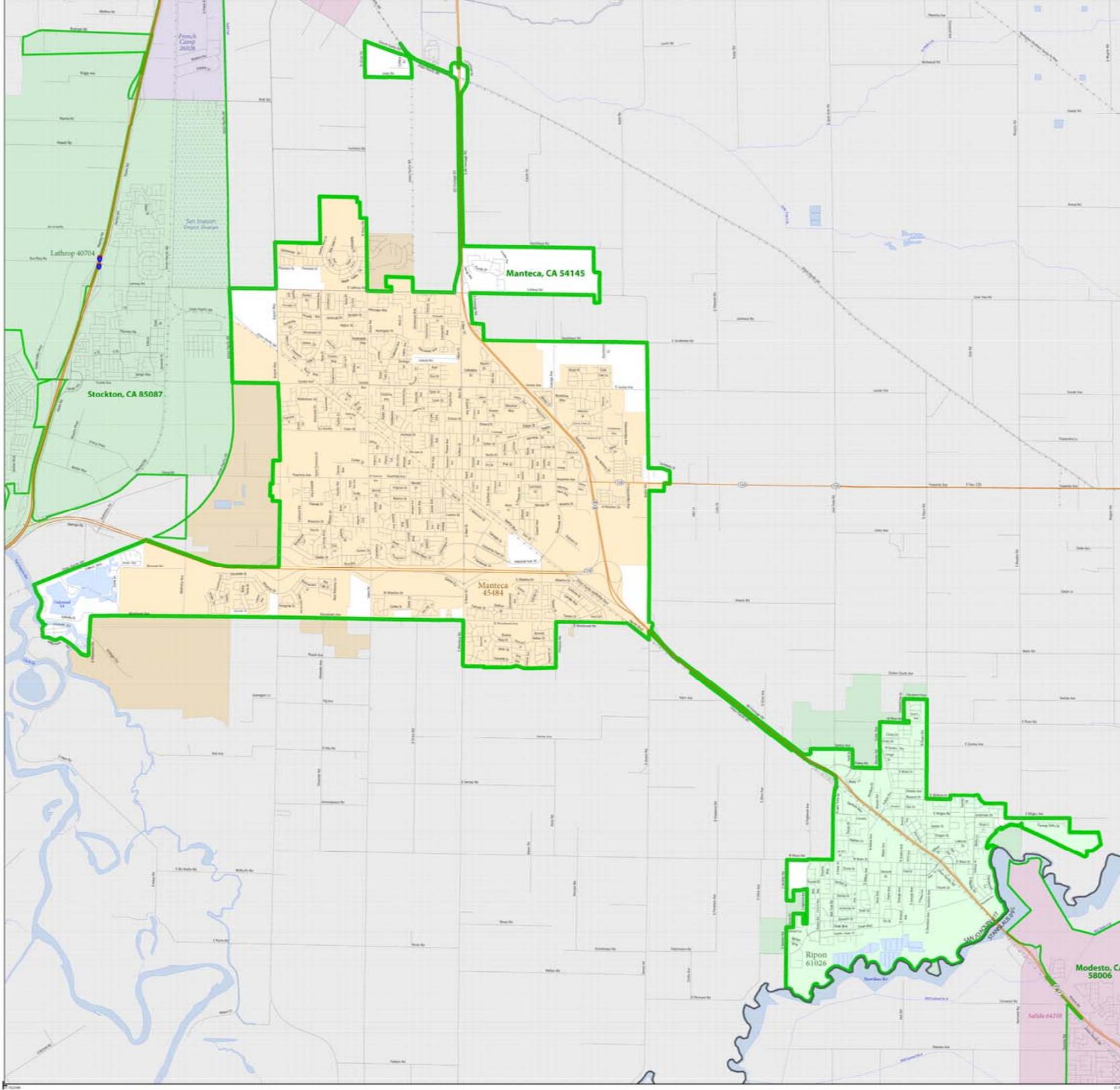
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3. Place label color corresponds to the place fill color. Label colors: Davis Davis Davis Davis Davis Davis

SUBJECT AREA COUNTIES ON MAP SHEET  
06077 San Joaquin

2010 Census:  
Urbanized Area  
Reference Map -  
Stockton, CA



Urbanized Area		Dover, DE 24580
Urban Cluster		Toole, VT 88057
State (or statistically independent entity)		NEW YORK 36
County (or statistically independent entity)		09E 029
Minor Civil Division (MCD) <sup>1,2</sup>		Bristol town 07485
Consolidated City		MILFORD 47500
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DESCRIPTION	SYMBOL	DESCRIPTION	SYMBOL
Interstate		Water Body	
U.S. Highway		Alluvial	
State Highway		Channel Subject Area	
Other Road			
Arterial			
Frontal Street			
Residential Street			

Where international, state, county, and/or MCD boundaries coincide, the map shows the boundary symbol for only the highest ranking of these boundaries.

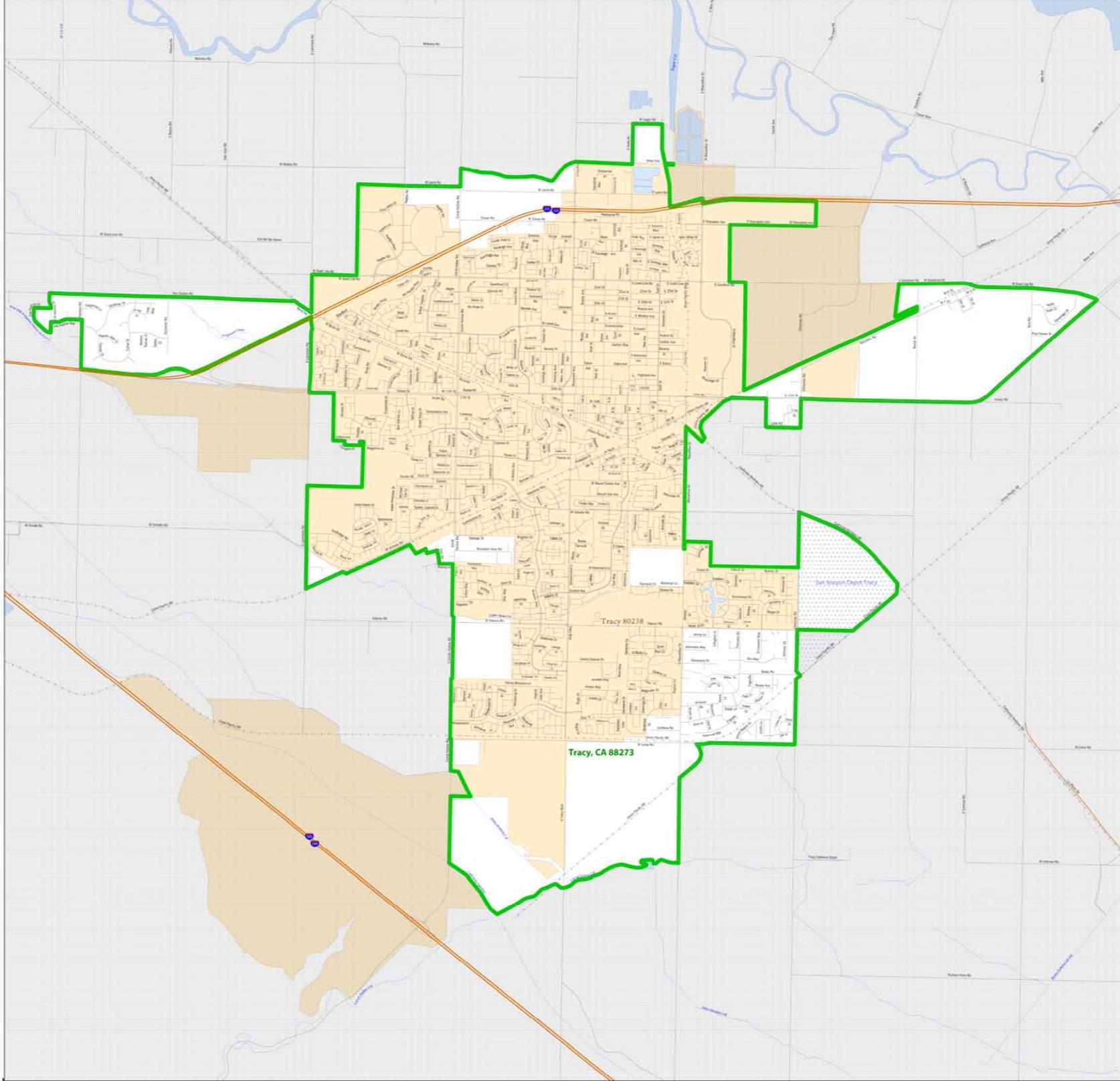
1 "A" following an MCD name denotes a false MCD. "A" following a place name indicates that a false MCD exists with the same name and FIPS code as the place; the false MCD label is not shown.

2 MCD boundaries are shown in the following states to which some or all MCD functions as general purpose governmental units: Connecticut, Illinois, Indiana, Kansas, Maine, Massachusetts, Michigan, Minnesota, Missouri, Nebraska, New Hampshire, New Jersey, New York, North Dakota, Ohio, Pennsylvania, Rhode Island, South Dakota, Vermont, and Wisconsin. Note that Illinois and Nebraska have some counties covered by non-governmental precincts and Missouri has most counties covered by non-governmental townships.

3 Place label color corresponds to the place fill color. Label colors: Davis Davis Davis Davis Davis Davis

**SUBJECT AREA COUNTIES ON MAP SHEET**  
06077 San Joaquin

2010 Census:  
Urbanized Area  
Reference Map -  
Manteca, CA  
(includes Ripon,  
CA)



Urbanized Area	Green outline	Dover, DE 24580
Urban Cluster	Thick green outline	Toolee, VT 88057
State (or statistically independent entity)	Black dashed line	NEW YORK 36
County (or statistically independent entity)	Black solid line	ERE 029
Minor Civil Division (MCD) <sup>1,2</sup>	Black dashed line	Bristol town 07485
Consolidated City	Black dotted line	MILFORD 47500
Incorporated Place <sup>1,3</sup>	Colorful outline	Davis 18100
Custom Designated Place (CDP) <sup>1</sup>	Colorful outline	Incline Village 89400

DESCRIPTION	SYMBOL	DESCRIPTION	SYMBOL
Interstate	Blue circle with 'I'	Water Body	Blue wavy line
U.S. Highway	Blue circle with 'U.S.'	Alluvial	Light blue shaded area
State Highway	Blue circle with 'S'	Channel Subject Area	Light blue shaded area
Other Road	Blue line	Planned Lake	Blue shaded area
Arterial	Blue line with 'A'		
Frontal Street	Blue line with 'F'		
Residential Street	Blue line with 'R'		

Where international, state, county, and/or MCD boundaries coincide, the map shows the boundary symbol for only the highest ranking of these boundaries.

1. A " " following an MCD name denotes a false MCD. A " " following a place name indicates that a false MCD exists with the same name and FIPS code as the place; the false MCD label is not shown.

2. MCD boundaries are shown in the following states in which some or all MCDs function as general purpose governmental units: Connecticut, Illinois, Indiana, Kansas, Maine, Massachusetts, Michigan, Minnesota, Missouri, Nebraska, New Hampshire, New Jersey, New York, North Dakota, Ohio, Pennsylvania, Rhode Island, South Dakota, Vermont, and Wisconsin. Note that Illinois and Nebraska have some counties covered by non-governmental precincts and Missouri has most counties covered by non-governmental townships.

3. Place label color corresponds to the place fill color. Label colors: Davis Davis Davis Davis Davis

**SUBJECT AREA COUNTIES ON MAP SHEET**  
06077 San Joaquin

2010 Census:  
Urbanized Area  
Reference Map -  
Tracy, CA



To forecast available funding levels in the federal funding programs over the ten-year horizon of the Systems Plan, SJCOG staff reviewed the total (nationwide) authorized funding levels in each program over the five-year period of the FAST-Act (FY2016 through FY2020). Using the five-year growth rate in each program as a trend, estimated annual authorization levels were computed for each program for the remaining years of the Systems Plan period (i.e., through FY2024). Next, staff reviewed actual FY2016 apportionments made to San Joaquin County jurisdictions, either at the local, county, or state level, based on the apportionment structure for each of the federal programs. Finally, assuming a constant apportionment share for each jurisdiction, the estimated apportionments by jurisdiction for all future years were computed for each federal program.<sup>22</sup> The total funding amounts resulting from these calculations are shown in Figure C6, with breakdowns showing the portion of each funding source that is apportioned directly to the ultimate recipients, sub-allocated based on either regulations or SJCOG policy, or awarded on a discretionary basis.

The total amount of federal funding anticipated in San Joaquin County over the Systems Plan period is approximately \$307 million. As shown in Figure C6, there is significant variation in the size of different federal programs, with nearly half of federal funds coming from the FTA 5307 (Urbanized Area) program, and the CMAQ (Congestion Mitigation and Air Quality) program representing more than a third of all federal funding available.

Discretionary amounts total approximately \$119 Million over the ten-year period. The funds in the FTA 5311 (Other than Urbanized Area) program and all of the funds in the CMAQ (Congestion Mitigation and Air Quality) program are allocated on a discretionary basis, at the state and regional level, respectively. Based on recent history, it has been assumed that 24.75% of CMAQ transit revenues would flow to rail (i.e., SJRRC) and that 27.45% of CMAQ transit revenues would be distributed to the bus operators in the County. In this analysis, the rail portion of CMAQ is treated as discretionary, because this tentative allocation is not yet formalized in SJCOG policy.

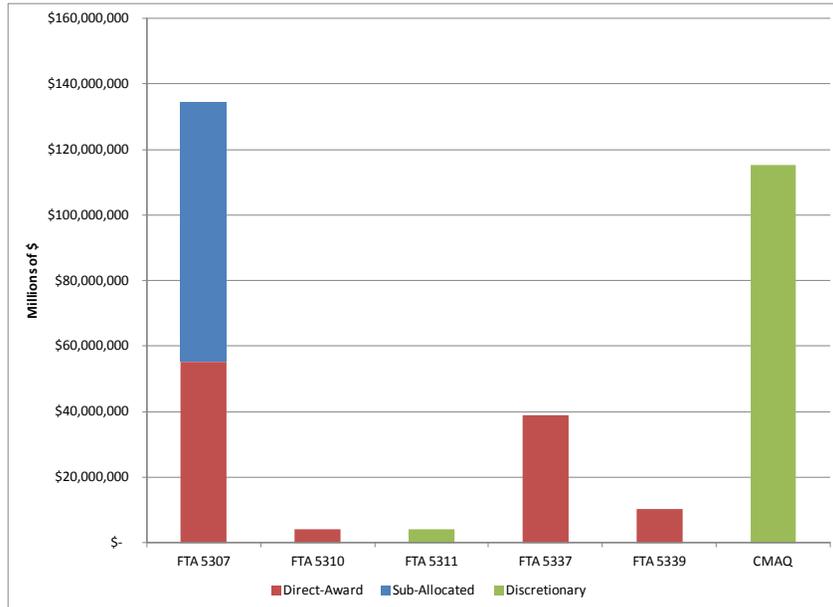
All other federal funding is awarded directly to recipients, almost entirely on a formula basis. Consistent with past practice in San Joaquin County, a portion of the funding in the FTA 5307 program is assumed to be sub-allocated to individual operators and jurisdictions. Specifically, the apportionment for the Stockton UZA has historically been split between the Regional Transit District (71%) and the Regional Rail Commission (29%) to support both of the transit providers that serve the City of Stockton. Also, the 2010 Census determined that the Manteca UZA should be extended to include the City of Ripon within its boundaries. The combined Manteca-Ripon UZA apportionment is then further sub-divided based on an FTA formula to meet the transportation needs of all residents.

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<sup>22</sup> In reality, each jurisdiction will receive a share of future program funding totals based on its *relative* share of factors such as population, transit service, etc. Rather than attempting to forecast the direction and magnitude of changes in apportionment share, this analysis applies a constant share over time as a simplifying assumption.



Figure C6: Total Federal Funding Estimates (FY2015 to



FY2024) for Systems Plan

Note: FTA 5337 and FTA 5339 are specifically designated for fixed guideway (rail) and bus, respectively.

Source: SJCOG staff analysis

2.2 State Funding Sources

The majority of state-administered funding for transit services in California comes from fuel taxes that flow into the State Transit Assistance (STA) fund through the Public Transportation Account. Other state funding sources that support transit include government bonds authorized through Proposition 1B and cap and trade revenues in the Greenhouse Gas Reduction Fund (GGRF). These sources are

described in more detail below and summarized in Table C2. Additional information about state funding programs for transit is included in Appendix B.

- » **State Transit Assistance (STA):** Authorized under the Transportation Development Act (TDA), this funding is derived from the statewide sales tax on diesel fuel and is appropriated annually by the State Legislature for transportation planning and mass transportation purposes. According to TDA program guidelines, funds for San Joaquin County are allocated using PUC formulas based on the relative share of transit ridership and fare revenues for each operator.
  - **Note:** Funding partners in the Bay Area contribute a small portion of that region’s allocated STA revenues towards ACE service operated by the Regional Rail Commission. This amount is separate from the San Joaquin County STA funds, but is included within the total STA funding estimate presented in the Systems Plan, in order to accurately represent all committed funding available to San Joaquin County operators.
  
- » **Proposition 1B:** Approved by the voters in 2006, this bonding program has multiple accounts that provide capital funding for transit investments. Available funding has nearly been exhausted, but some operators are still using allocations from two accounts:



- **Public Transportation Modernization, Improvement, and Service Enhancement Account (PTMISEA):** Allocated to local operators and regional transportation planning agencies (i.e., SJCOG) based on the same PUC formulas that are used for distributing State Transit Assistance (STA), as described above.
  - **Transit System Safety, Security, and Disaster Response Account (TSSSDRA):** Allocated by the Legislature directly to specific capital projects.
- » **Greenhouse Gas Reduction Fund (GGRF):** This new fund receives revenues from California’s cap and trade program. In 2015, the Legislature approved an expenditure plan that will set aside a portion of revenues to support two transit funding programs on an on-going basis:
- **Low Carbon Transit Operations Program (LCTOP):** This program is funded as a set-aside within the GGRF and continuously appropriated based on the same PUC formulas that are used for distributing State Transit Assistance (STA), as described above.

- **Transit and Intercity Rail Capital Program (TIRCP):** This is a competitive grant program administered by Caltrans and the California State Transportation Agency (CalSTA). Due to uncertainty about the likelihood that San Joaquin County transit operators will receive funding on an on-going basis, this program is not forecast in Systems Plan revenue estimates at this time.

**Table C2: List of State Funding Programs for Systems Plan**

MAP-21 Program Name	Permitted Uses		Eligible Modes	
	Capital	Operating	Bus	Rail
State Transit Assistance (STA)	✓	✓	✓	✓
Proposition 1B: PTMISEA	✓		✓	✓
Proposition 1B: TSSSDRA	✓		✓	✓
GGRF: Low Carbon Transit Operations Program (LCTOP)	✓	✓	✓	✓

Source: SJCOG

Different methods were used to forecast total revenues available in each state program listed in Table C2:

- » **STA** – No growth is assumed in total revenues, due to declining tax receipts in recent years and increasing uncertainty about future fuel sales and taxation rates.



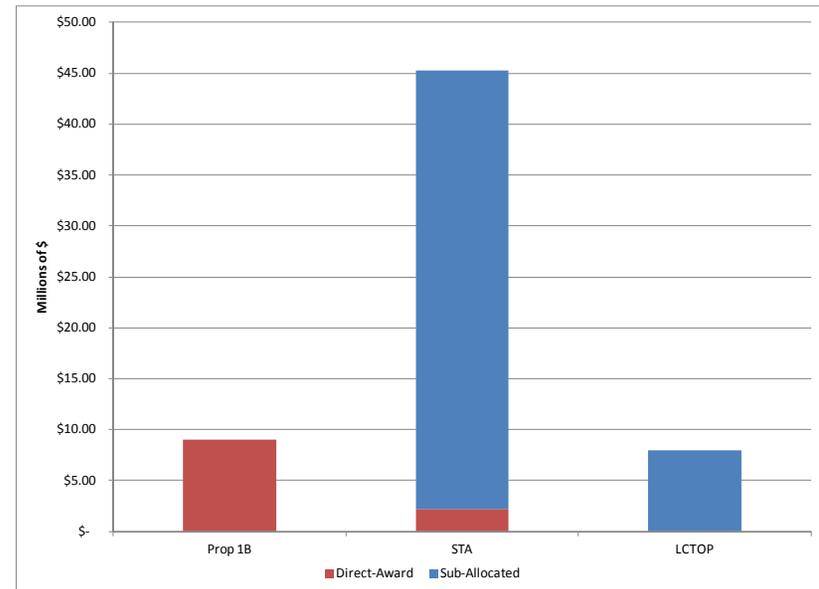
- » **Proposition 1B** – The bond program is expected to sunset by the end of FY2016-17. Funding amounts in the Systems Plan estimate are based on what individual operators reported they had available for the remainder of the program.
- » **GGRF-LCTOP** – This program is still fairly new, and a track record has not been established for trends in cap and trade revenues. No growth is assumed.

Combining these assumptions, the total state funding available in the ten-year Systems Plan period is approximately \$62 million, of which about \$11 million is expected to be directly allocated to individual operators either due to program guidelines, or because discretionary funds have already been committed to specific projects. The remaining \$51 million is sub-allocated using PUC formulas based on transit ridership and fare revenue.

For the purposes of the Systems Plan estimate of available revenues, several assumptions were made about forecast levels of ridership and revenue. First, it was assumed that the relative share of ridership and revenue for different operators in San Joaquin County would remain unchanged over the ten-year study period. This assumption may not be consistent with the operators’ most recent growth projections, and will need to be examined as part of development of funding policy proposals. In addition, the TDA program guidelines require that recipients of STA funding maintain certain levels of fare revenues relative to total operating expenses (a.k.a. farebox recovery ratio), or that they meet an alternative ratio based on fares plus other local funding contributions relative to total operating expenses. It was assumed that all operators will maintain an operating funding plan that complies with these requirements.

It should also be noted that current Board-adopted SJCOG policy provides a minimum guarantee of STA funding to Escalon and Ripon of \$5,000 per year for each city. The preliminary Systems Plan funding estimate assumes that this practice will continue, but the policy may be revisited in the future. The total state funding by program and allocation method is depicted in Figure C7.

**Figure C7: Total State Funding Estimates for Systems Plan (FY2015 to FY2024)**



Note: Proposition 1B amounts based on data reported by individual operators. Sub-allocation of funds under STA and LCTOP assumes relative shares of transit ridership and fare revenue for each operator will mirror current levels in all future years. Source: SJCOG staff analysis



## 2.3 Local & Regional Funding Sources

The term “local funding” typically refers to the sources that are entirely within the control of an individual transit operator, such as passenger fare revenues, other operating revenues (e.g., advertising, concessions), and contributions from property taxes or other local assessments. Certain regionally-administered programs also come from local sources. These include Local Transportation Funds (LTF), the Measure K sales tax, and the Regional Transportation Improvement Fund (RTIF).<sup>3</sup> Each is described separately below.

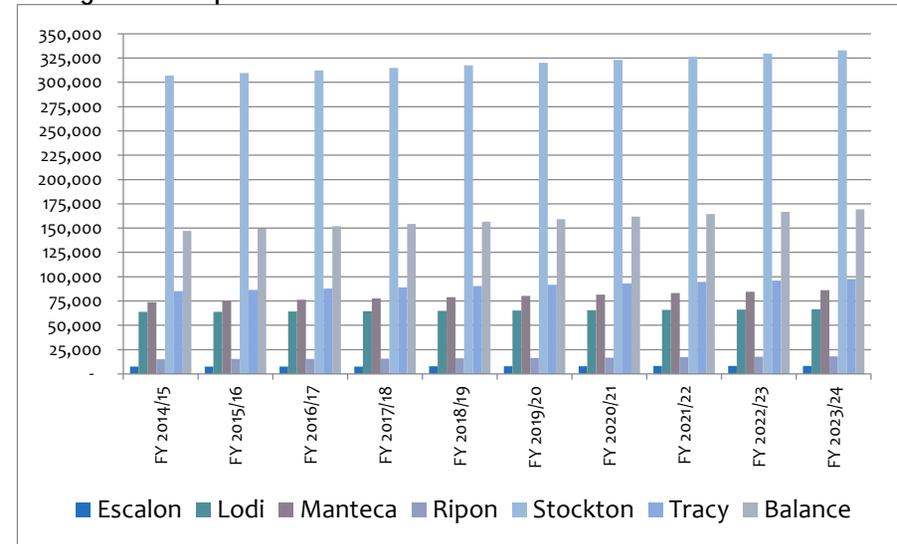
### 2.3.1 ► Local Transportation Fund (LTF)

The biggest source of local revenues in San Joaquin County is the Local Transportation Fund (LTF), which is the portion of the Transportation Development Act (TDA) revenues that are generated from a state-authorized quarter-cent sales tax and allocated to counties based on pro rata population for transportation purposes. Several “off the top” deductions are made for program administration, planning, and bicycle & pedestrian needs; together these total about 6% of all LTF revenues received by the County. There is also a deduction for rail passenger service; the amount varies depending on annual revenue claims, as described further below. The remaining funds are then distributed to individual jurisdictions based on population. The funds can be used for most types of capital and operating expenses that support transportation needs in the recipient communities.

<sup>3</sup> Many transit operators use funds allocated to them from the regional funding programs as their “local match” when applying for state and federal grant programs. While these sources are administered at the regional level, the revenues are locally generated, making them eligible to count as local match under most grant guidelines.

For jurisdictions whose population is less than 100,000, LTF can be used on either transit services or local streets and roads. Jurisdictions with more than 100,000 residents are no longer eligible to claim LTF for local streets and roads purposes; they may only spend LTF on transit. Figure C8 shows population forecast by jurisdiction for the Systems Plan period. Depicted are Stockton and the unincorporated areas in the remainder of the County already over the 100,000 threshold, but no other jurisdictions are expected to reach this level by the end of the forecast horizon.

Figure C8: Population Forecast for Jurisdictions with Transit Service



Source: CA Department of Finance

*The Transportation Development Act (TDA) requires a specific transit finding before allocation of LTF (local TDA) funds for other non-transit*



*purposes. Use of LTF funds for non-transit purposes can only be done if there are no unmet transit needs that are reasonable to meet.*

To develop a forecast of available LTF funding through 2024, it was estimated that the total program revenues would grow at about 4% per year through FY2017/18 to reflect continued economic recovery in the region; thereafter, gross LTF receipts are forecast to grow 2% per year. It was also assumed that administration expenses would be constant at approved levels for FY2016/17, and that off-the-top deductions would remain at their existing share of revenues over time (i.e., 3% for planning, and 2% for bicycle & pedestrian needs). After deductions for administration, planning, and bicycle & pedestrian projects, the remaining LTF program revenues for all other transportation uses in San Joaquin County jurisdictions over the Systems Plan period would be approximately \$277 Million.

Historically, the Regional Rail Commission (RRC) has received less than \$700,000 in LTF funding each year. Given the significant capital investment needed to support additional operating costs for ACE passenger rail service over the next decade, RRC (in 2014) requested a much larger share of \$4 Million in LTF funds on an ongoing basis. In February, 2015, a compromise was negotiated that would provide \$1.3 Million to RRC in FY2015/16 as SJCOG worked with local agencies and transit operators on the FY 16/17 apportionment. In June 2016, the SJCOG Board approved a larger apportionment of \$2.2 Million for rail transit for FY2016/17. The SJCOG Board discussed the concept of an 11.5% maximum of LTF funds for rail while SJRRC explores financing contributions with Santa

Clara and Alameda to eliminate shortfalls. While that 11.5% cap for rail transit was not formally approved as it impacts future fiscal years, the LTF financial assumption includes this cap.<sup>4</sup> These assumptions result in a funding estimate of \$28 Million for RRC, leaving \$248 Million to be distributed to other jurisdictions in the County, based on their population forecast.

Some San Joaquin jurisdictions do not have any transit service, so their LTF is not available to support transit operations; the subtotal assumed to be allocated to the transit-serving jurisdictions over the Systems Plan period is \$229 Million. However, some of these jurisdictions use a portion of their LTF on local streets and roads (LS&R) expenditures, further reducing the amounts expected to be utilized for transit. To determine the amount of LTF available for transit purposes over the forecast period, SJCOG staff examined historical LTF claims by each jurisdiction over the past five years. It was assumed that the cities would make future claims for transit versus LS&R in the same average proportions for all future years.

The effects of these assumptions are illustrated in Figure C9. Figure C9 shows the total LTF revenue over the forecast period available to each jurisdiction in San Joaquin County that operates bus service; the ten-year jurisdiction totals are split into bus transit and LS&R uses based on the historical average division of claims by jurisdiction.

Using the assumptions above, the resulting LTF available for bus transit purposes over the ten-year forecast period is \$185 Million.

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<sup>4</sup> While SJCOG has worked closely with key stakeholders to negotiate terms which are reasonably acceptable to all affected parties, the formal apportionment of future LTF funds is subject to annual Board actions after the California Board of Equalization provides SJCOG with its official estimate of revenues available for allocation each year.

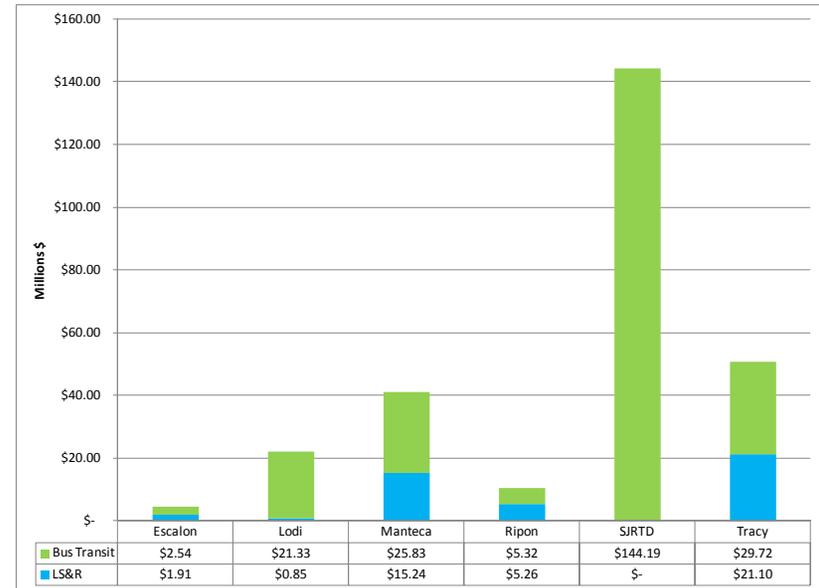


Combined with the anticipated \$28 million allocation to SJRRC, the total LTF available for all transit uses in San Joaquin County is \$213 million.

*The cities of Escalon, Lodi, Manteca, Ripon, and Tracy operate their own local transit systems.*

*The City of Lodi has historically used nearly 100% of its LTF funds for transit while the other cities use LTF for both transit and local streets and roads.*

Figure C9: Total LTF Available to Jurisdictions with Bus Transit Service (With Assumption of Transit Uses versus Local Streets & Roads Uses Based upon Historical Average, FY2015 to FY2024)



Source: CA Board of Equalization estimates for 2015 and 2016, with analysis by SJCOG staff



### 2.3.2 ► Measure K Renewal

This voter-approved measure was passed in 2006, authorizing the continuation of a half-cent sales tax on retail transactions and uses within San Joaquin County, to be distributed according to a formal expenditure plan. Thirty percent (30%) of net revenues are designated for rail, bus, bicycle, and pedestrian purposes, subdivided into four categories.

Three of these are related to transit:

- **Passenger Rail Transit** – Receives 39% of the transit allocation (11.7% of total revenues) to “promote and upgrade commuter rail service provided by the Altamont Commuter Express (ACE) service.”<sup>5</sup> Capital expenditures are preferred investments, though operating costs are an eligible expense.
- **Bus Transit** – Receives 49% of the transit allocation (14.7% of total revenues) to support “interregional/intra-city commute, inter-city, and elderly/persons with disabilities bus service.”<sup>6</sup> Funds are primarily targeted towards operating needs, though capital expenses are an eligible expense. Funds are distributed by population, with at least 50% allocated to the San Joaquin Regional Transit District (RTD). For the Cities of Ripon and Escalon, 50% of their allocation is designated for transit service to and from Modesto, with any unused portion made available for regional transit service.

**Bus Rapid Transit Capital** – Receives 5% of the transit allocation (1.5% of total revenues) to be used “for infrastructure to support Bus Rapid Transit service,”<sup>7</sup> including stations, fare collection systems, and traffic signal pre-emption equipment. It is assumed that San Joaquin Regional Transit District (RTD) is the only operator in a position to claim these revenues during the Systems Plan period.

Both the Bus Transit and the BRT Capital categories have a unique funding requirement based on how jurisdictions of different sizes use their LTF funding. Specifically, jurisdictions with 75,000 or more residents may not apply for Measure K funding if they claim any of their LTF for local streets and roads purposes.<sup>8</sup> At present, only the City of Tracy is precluded from claiming Measure K revenues by this rule. However, the population projection shown in Figure C8 shows that the City of Manteca will likely cross the 75,000 threshold during the Systems Plan period.

The funding estimate of available Measure K revenues during the Systems Plan period is based on actual values for FY2013/14 and a growth rate provided by SJCOG’s municipal finance consultant. Total Measure K revenues over the ten year period will be almost \$600 Million. Of this, the transit and bike/pedestrian portion is approximately \$166 Million. The transit-related sub-allocations include Passenger Rail Transit (\$70 Million), Bus Transit (\$87 Million), and BRT Capital (\$9 Million).

<sup>5</sup> Source: Measure K Renewal Expenditure Plan, SJCOG.

<sup>6</sup> Ibid.

<sup>7</sup> Ibid.

<sup>8</sup> Note that this threshold is different from the separate TDA requirement that constrains the use of LTF to transit-only for jurisdictions with over 100,000 residents. See description of LTF funding, earlier in this chapter, for more information.



**2.3.3 ► Regional Transportation Improvement Program (RTIF)**

Implemented in 2006, the RTIF program imposes a one-time fee on new residential and non-residential development in San Joaquin County. The fee is imposed and collected by the cities of Escalon, Lathrop, Lodi, Manteca, Ripon, Stockton, Tracy, and the County of San Joaquin. Within the Systems Plan financial analysis, this category is focused on the forecast and allocation of the 15% of RTIF revenues available to San Joaquin County and managed directly by SJCOG.

The funding estimate of available RTIF revenues during the Systems Plan period is based on actual values for FY2013/14 and a growth rate provided by SJCOG’s municipal finance consultant. The estimate also includes the value of the banked carryover revenue in the RTIF program at the end of FY2013/14. Over the ten-year forecast period, the total revenues available to SJCOG from the RTIF will be approximately \$4 Million.

Following the allocation assumptions from the most recently approved Regional Transportation Plan, transit is assumed to receive one-third of SJCOG’s share of RTIF revenues, of which 70% is currently assumed to be available for bus transit purposes and 30% is assumed available for rail transit purposes. This assumption, and sub-allocation to individual transit operator needs, is subject to additional SJCOG Board-level policy discussion.

**2.3.4 ► Passenger Fare Revenues**

Passenger fares include revenues paid by transit patrons for fixed route, dial-a-ride, and paratransit services on both bus and rail modes. They are the only direct user fees included in the Systems Plan financial analysis. Other types of operating revenues (e.g., advertising) are discussed separately, in the next section.

Individual transit operators have developed forecasts of future fare revenues based on their own estimates of ridership growth, service changes, and future fare increases, if any. These forecasts were discussed for individual operators in Chapter 2. The total forecast of fare revenues for each operator over the ten-year period is summarized below in Table C3.

**Table C3: Summary of Fare Revenues for Systems Plan (FY2015 – FY2024), (as reported by transit operators, rounded to thousands)**

<i>Jurisdiction / Transit Service</i>	<i>Available Revenues</i>
City of Escalon / eTrans	\$ 57,000
City of Lodi / Lodi Transit	\$ 2,295,000
City of Manteca / Manteca Transit	\$ 641,000
City of Ripon / Blossom Express	\$ 84,000
City of Tracy / Tracer	\$ 1,500,000
San Joaquin Regional Transit District / RTD	\$ 53,789,000
San Joaquin Regional Rail Commission / ACE	\$ 112,417,000
<b>TOTAL, All Operators</b>	<b>\$ 170,783,000</b>

**2.3.5 ► Other Local Sources**

Most transit operators are able to generate a small amount of other operating revenues beyond passenger fares. This could come from activities such as advertising on vehicles, benches, and shelters; customer amenities such as parking; or concessions such as newspaper boxes and vending machines. The transit operators have estimated their non-passenger revenues over the course of the Systems Plan, as described in Chapter 2 and summarized below in Table C4.



Table C4: Summary of Other Operating Revenues for Systems Plan (FY2015 – FY2024), (as reported by transit operators rounded to thousands.)

Jurisdiction / Transit Service	Available Revenues
City of Escalon / eTrans	\$ 6,000
City of Lodi / Lodi Transit	\$ 203,000
City of Manteca / Manteca Transit	\$ 474,000
City of Ripon / Blossom Express	(none reported)
City of Tracy / Tracer	\$ 450,000
San Joaquin Regional Transit District / RTD	\$ 1,540,000
San Joaquin Regional Rail Commission / ACE	(none reported)
<b>TOTAL, All Operators</b>	<b>\$ 2,673,000</b>

In addition to the funding sources that are derived from operating activities, local jurisdictions often decide to make other contributions towards operating and maintaining their transit services. This could be in the form of general fund revenues, dedicated property tax assessments, or grants from non-transportation funding partners (e.g., public health, department of education, etc.). The transit operators have estimated the amount of committed local (non-operating) revenues over the course of the Systems Plan, as described above in Chapter 2 and summarized in Table C5.

Table C5: Summary of Other Local Revenues for Systems Plan (FY2015 – FY2024), (as reported by transit operators, rounded to thousands)

Jurisdiction / Transit Service	Available Revenues
City of Escalon / eTrans	(none reported)
City of Lodi / Lodi Transit	(none reported)
City of Manteca / Manteca Transit	(none reported)
City of Ripon / Blossom Express	(none reported)
City of Tracy / Tracer	(none reported)
San Joaquin Regional Transit District / RTD	\$ 8,799,000
San Joaquin Regional Rail Commission / ACE	\$ 88,155,000
<b>TOTAL, All Operators</b>	<b>\$ 96,954,000</b>

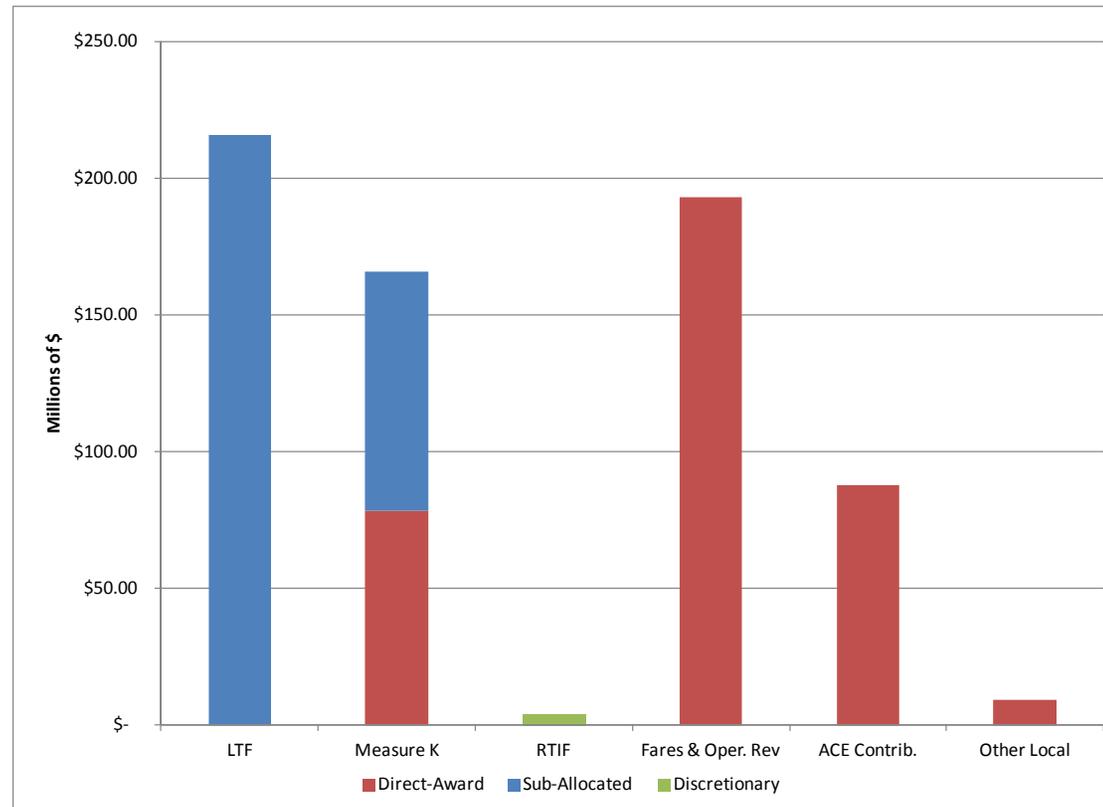
The value shown in Table C5 for the Regional Rail Commission includes an annual grant of \$60,000 from the Transportation Fund for Clean Air (TFCA) as well as negotiated annual financial contributions of local funding from several adjacent counties to support ACE services that serve those areas. In FY2014/15, Alameda County contributed \$3.3 Million and Santa Clara County contributed \$3.1 Million. ACE has secured a commitment to increase these contribution amounts in future years to keep pace with increasing costs. In addition, Alameda County provides a level \$2 Million contribution each year for “Baseline” capital expenditures. For all operators combined, the total other local revenues expected to be available during the Systems Plan period would be \$97 Million.



2.3.6 ➤ Summary of Local Sources

As with the federal and state revenues sources, the estimates of local funding described above can be summarized by program and categorized by allocation method. These are depicted below in Figure C10.

Figure C10: Total Local Funding Estimates for Systems Plan (FY2015 – FY 2024)



Note: LTF estimates assumes completion of transition 11.5% share for RRC. Fares & Operating Revenue, ACE Contributions, and Other Local amounts based on data reported by operators. Source: SJCOC staff analysis

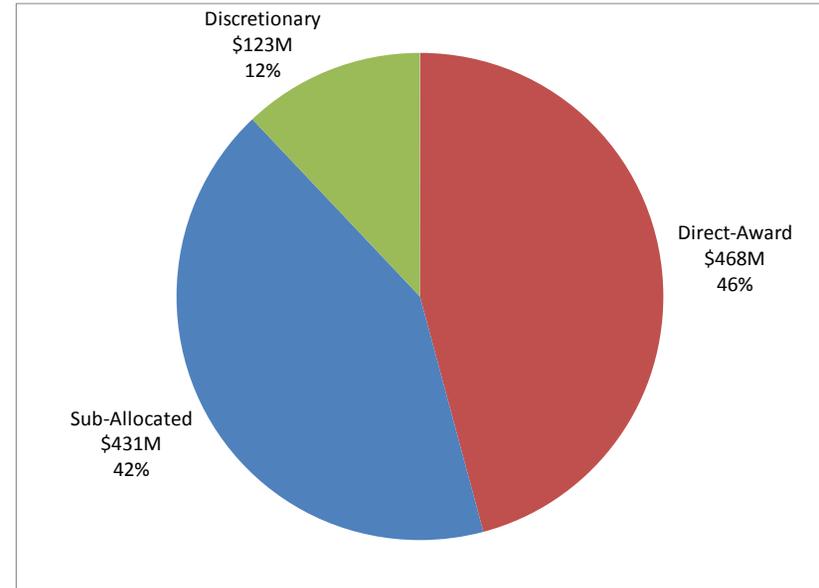


#### 2.4 Synthesis: Total Available Funding

Across all ten years of the Systems Plan forecast period, the funding programs described above are estimated to yield a total of \$1.02 billion in revenues to support transit services in San Joaquin County. Summing across federal, state, and local sources, approximately \$123 million (12%) of total revenues are allocated at the full discretion of SJCOC, with the remainder split almost evenly between sources that are awarded directly to individual jurisdictions and those sources where a regulation, formal policy, or established formula guides sub-allocation to individual recipients.

These breakdowns are depicted in Figure C11. Figure C12 breaks out the values from Figure C11 by federal, state, and local level.

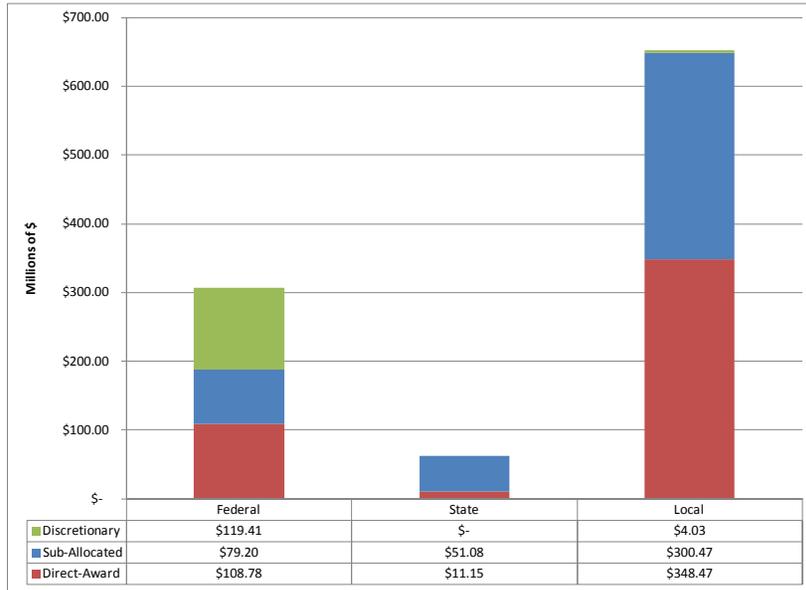
Figure C11: Total Estimated Funding for Systems Plan (FY2015 to FY2024), (Presented by Allocation Method)



Source: SJCOC staff analysis



**Figure C12: Total Estimated Funding for Systems Plan (FY2015 to FY2024), (Presented by Allocation Method)**

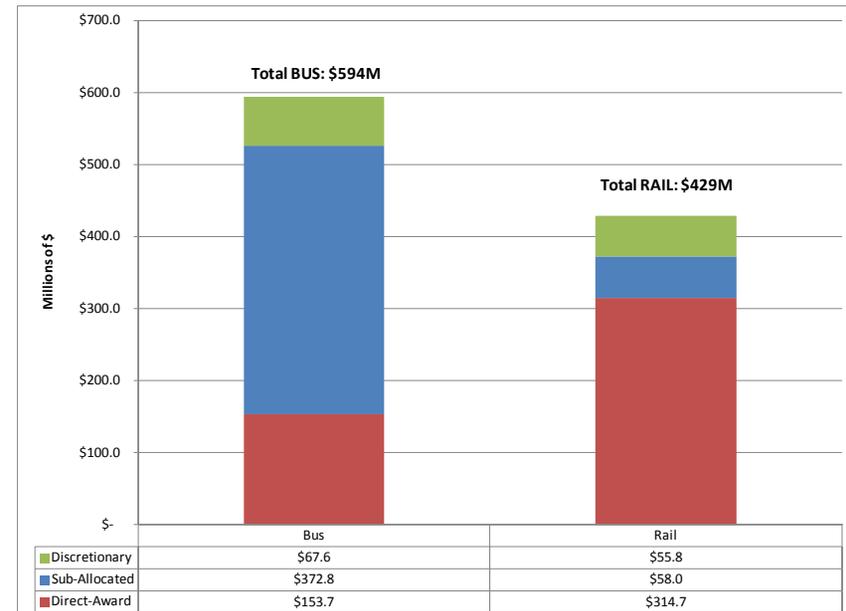


Source: SJCOC staff analysis

The next section of this chapter depicts the estimated available funding with the capital and operating needs that have been identified by the transit operators. To facilitate this comparison, the revenues described above have been grouped by modes—bus or rail—based on existing federal formulas, established state regulations, adopted SJCOC Board policies, and SJCOC staff review of historical practices. Figure C13 depicts the provisional assignment of available revenues by mode and allocation method. Direct-award funds are already committed to specific operators, but the SJCOC Board will need to review the extent to which sub-allocated and discretionary funds can or should be adjusted to best meet the needs of all operators in the

County. Of the total revenues portrayed in Figure C13, Figure C14 shows that approximately \$147 million come from revenue sources that are restricted for capital uses only, while the remaining \$876 million can be used on either capital or operating needs. The capital-only funding sources represent a sub-set of the direct-award funding portrayed in Figure C12. The balance of direct-award funds (\$321 million) and all of the sub-allocated funding (\$431 million) and discretionary funding (\$123 million) in the plan allow for flexibility to apply the revenues to operating or capital needs, as determined by the recipient.

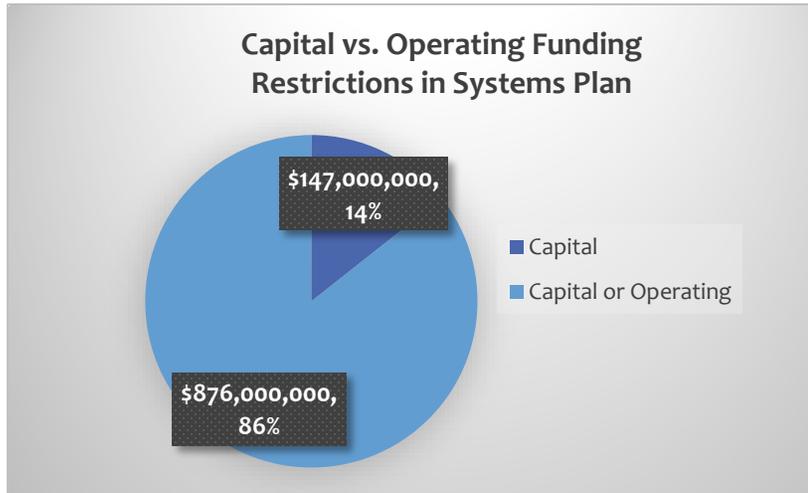
**Figure C13: Total Estimated Funding for Systems Plan (FY2015 to FY2024), (Presented by Allocation Method & Mode)**



Source: SJCOC staff analysis



Figure C14: Total Estimated Funding for Capital and Operating, by Percent in Systems Plan





### 3 Total Analysis of Transit Operator Funding Needs

The previous section of this chapter described SJCOG staff estimates of total funding overall, as well as some of the current practices for how that funding is distributed to different operators in the County. This section shifts the focus to the forecast of financial need as estimated by the individual operators and provides a comparison between estimated revenues available and the anticipated expenses (Figure C15). The discussion highlights key implications for addressing the funding needs identified in Chapter 2, and notable differences in assumptions and growth trends are flagged in order to facilitate development of additional policy guidance.

#### 3.1 Funding Needs for Bus Services

Through 2024, the six bus operators in San Joaquin County have identified a total financial need of \$680 million. More than 70% of this amount would be for capital purposes, with the remainder used to support transit operations. The funding amounts required vary widely by type of expense and operator, ranging from a capital need of only \$169,000 for Escalon to more than \$391 million in operating needs for RTD.

Figure C16 presents the total ten-year capital and operating needs, by operator, as identified in their individual vignettes. These estimates are not financially constrained by available funding; the amounts represent the operators' assessment of the total expenditures required to enhance and expand transit services in San Joaquin County. As can be seen in the graph, the total financial needs for RTD far outweigh those of all other bus operators combined.

SJCOG staff has identified a total of \$525 million in revenues available to support bus transit needs over the same ten-year period,

a gross shortfall of approximately \$155 million. Some operators are estimated to be overfunded while others are underfunded. Policy adjustments will likely be needed in order to balance all available revenues with total needs.

Figure C17 presents a comparison of the total funding need (costs) presented in Figure C16 with the committed funding available to all bus transit operators for each type of expenditure, according to SJCOG's estimate. The estimate assumes the continuation of existing funding policies, and does not include the allocation of discretionary sources such as RTIF and CMAQ at the operator level. The \$155 million gap between committed bus funding and total needs for bus transit is the sum of the uncommitted funding sources in the revenue estimate (\$69 million) plus the unfunded costs in the operator vignettes that exceed the estimated revenue available to bus operators (\$86 million).

Figure C15: Cost and Benefits Balance

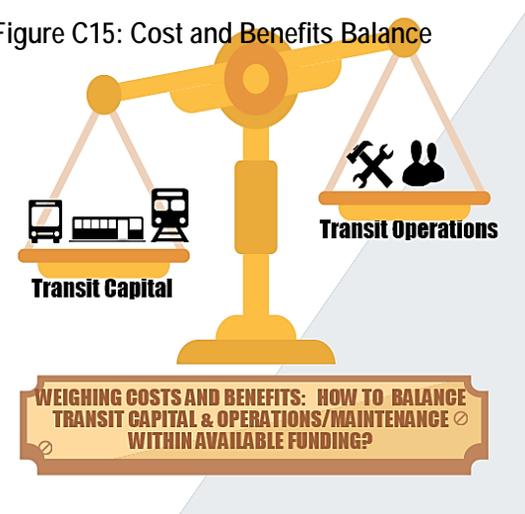
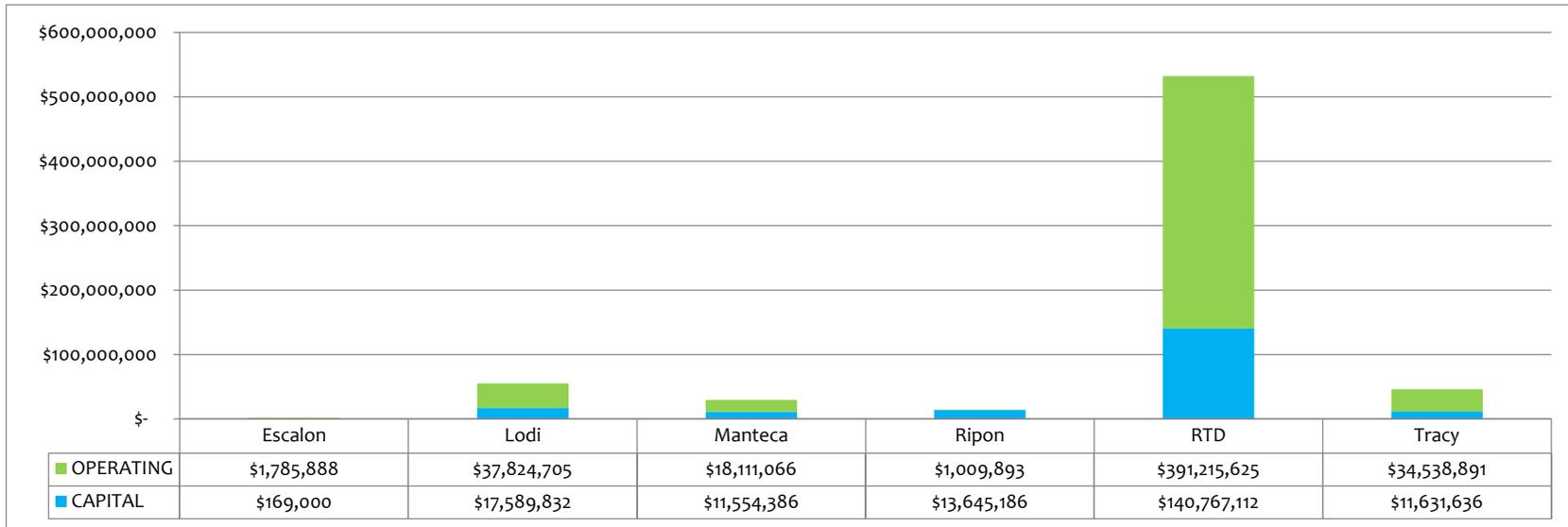




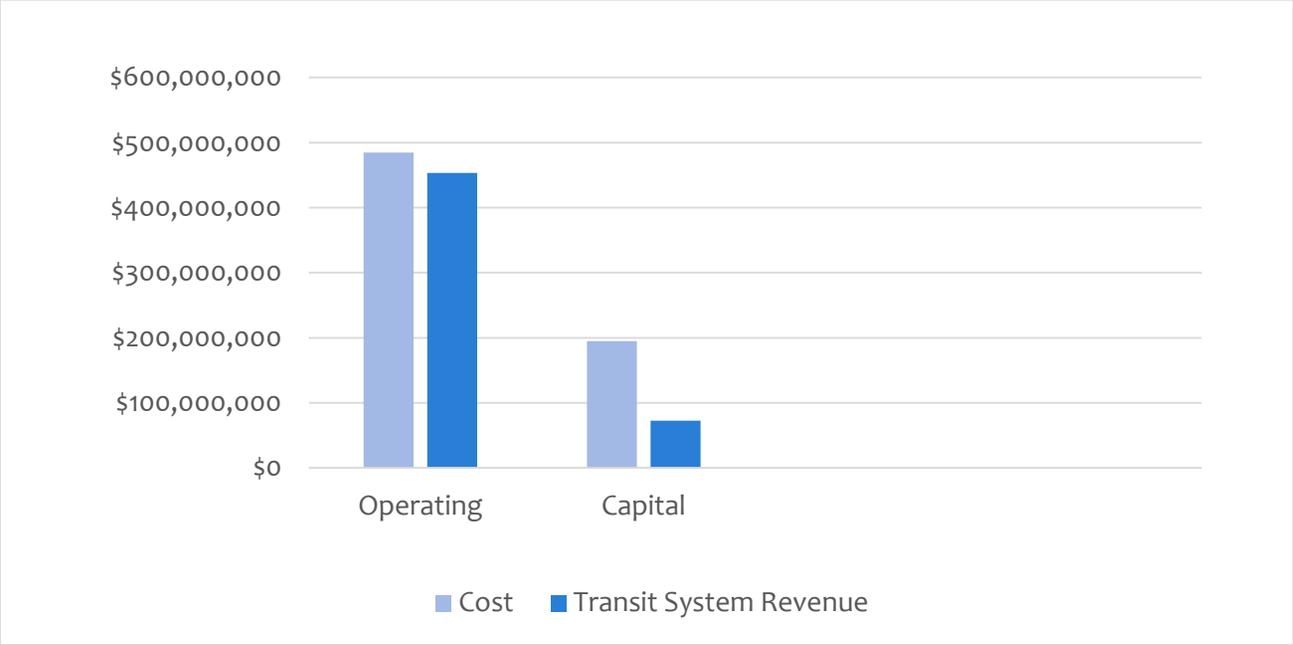
Figure C16: Total Financial Need for Bus Services, by Operator (FY2015 to FY2024)



Note: SJCOC provided an escalator for some of the operator reported figures identified in Chapter 2 (by SJCOC) to reflect year of expenditure dollars. Source: Transit operator funding plans and SJCOC staff analysis



Figure C17: Systems Plan Estimate of Total Costs vs. (Directly allocated) Revenue Available for All Bus Services (FY2015 to FY2024)



Source: Operator funding plans and SJCOG staff analysis



### 3.2 Funding Needs for Rail Services

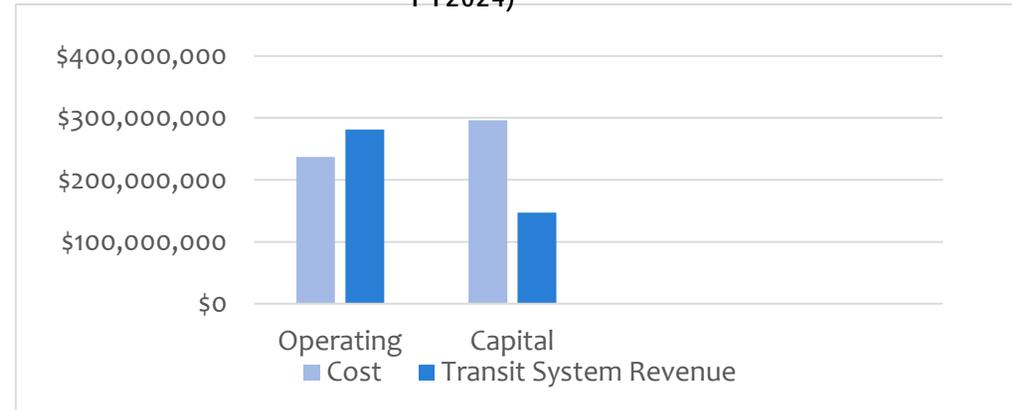
The Regional Rail Commission (RRC) has quantified the total financial needs of the ACE train over the Systems Plan period at \$533 million, split fairly evenly between capital needs (\$296 million, or 56%) and operating needs (\$237 million, or 44%).

Because the ACE train also serves the Bay Area, RRC has negotiated significant funding contributions from partners in Alameda and Santa Clara counties. For the purposes of the Systems Plan, these funding sources are considered fully committed.

Additionally, as a rail operator, RRC also has access to some funding sources that bus operators do not typically access, including FEMA and Homeland Security grants at the federal level and Transit and Intercity Rail Capital Program (TIRCP) revenues awarded from the state's Greenhouse Gas Reduction Fund. In total, RRC has identified almost \$171 million in external capital funding from sources that are not separately forecast by SJCOG or included in the Systems Plan funding estimate outlined earlier in this chapter. At this time, these funded sources are treated as uncommitted, because it is not clear whether these future grants will materialize at anticipated levels.

The Systems Plan revenue estimate projects that up to \$429 million in revenues could reasonably be available to SJRRC under current policies and practices. Although the majority of these funds are flexible, for the purposes of analyzing the SJRRC budget, funds have been divided consistent with SJRRC's proposed application to capital and operating uses. Using this approach, the Systems Plan estimates that \$147 million will be available for capital uses and \$281 million will be available for operating uses. These values are portrayed in Figure C18.

Figure C18: Estimated Rail Costs Vs. Revenue (FY2015 to FY2024)



Source: SJRRC funding plan and SJCOG staff analysis



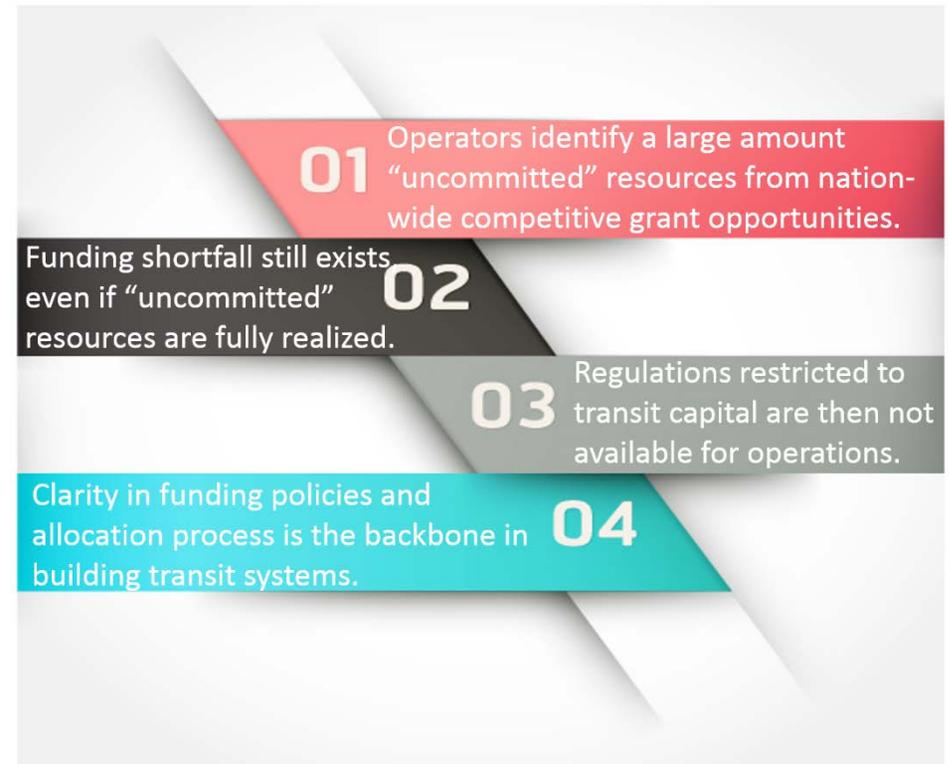
### 3.3 Summary of Revenue Differences

Across all available funding sources, SJCOG staff has estimated that about \$1.02 billion in revenue is available to support transit services over the next ten years from sources that are pledged to San Joaquin County. The seven transit operators in the County have forecast that they will need \$1.21 billion over the same period.

*The transit operators have identified ambitious goals to secure up to \$180 million in external funds that could help to close much of the shortfall. However, these funds are not sufficiently committed to ensure that San Joaquin County transit will be maintained in a state of good repair.*

Furthermore, even if all uncommitted funding were to be received from sources outside the county, a major challenge remains in that funding pledged within the county is not currently distributed in a way that consistently matches available revenues across all capital and operating needs. Funding is often allocated only to specific operators, and existing regulations frequently restrict the ways in which the funds may be used. Significant policy changes will be needed to adjust funding distributions in San Joaquin County, balance apparent surpluses and deficits, and meet the region's total transit funding needs over the timeframe of the Systems Plan.

Figure C19: Key Observations on Financial Outlook



Source: SJCOG



## 4 Funding Policy Considerations and Questions

The discussion presented thus far in this chapter highlights the fact that there is currently insufficient funding to fully fund the capital and operating needs that have been identified in San Joaquin County. And, some funding sources are allocated to individual operators in ways that create inefficient surpluses and deficits. As part of working to resolve this funding shortfall in the months and years ahead, a number of funding policy issues will need to be reviewed and resolved.

The following section describes some issues, considerations, and questions to jumpstart the funding policy discussion. This list is not meant to be an exhaustive inventory of funding issues, but rather, an instrument to help policy makers, transit service operators, the general public, and stakeholders delve into some complicated questions.

While this chapter's focus was funding, the underlying foundation of the Systems Plan is a recognition that investing strategically requires a comprehensive look of all variables impacting public transportation.

Figure C20: Stakeholder Engagement



**Financing a sustainable regional transit system is not simply a math exercise.**



1. **Allocation process for discretionary CMAQ funding.**

Funding in the CMAQ program is not formally allocated to specific jurisdictions or projects, but is rather subject to discretionary action by SJCOG. The Systems Plan analysis developed a preliminary estimate for the operators based on recent patterns in distribution of funding, but this placeholder is only preliminary, and funding allocations could be adjusted to help close capital and operating shortfalls. The SJCOG Board will need to re-evaluate how transit is funded in its competitive CMAQ process, which currently does not articulate any individual discretionary awards to transit projects. Should it program projects to help address specific funding needs shown in the operator vignettes, or rather, should future CMAQ policy consider something more structured that would distribute CMAQ funding in future years simply based air quality objectives of the CMAQ program?

2. **Allocation process for discretionary Regional Surface Transportation Block Program (formerly RSTP).**

Regional Surface Transportation Block Program Funding (in the San Joaquin region) is done through a Board adopted formula allocation that does not include allocations to bus or rail transit operators. The funds have traditionally been allocated for local street and road expenditures for expansion, safety, or maintenance projects. Should there be a formula provision for transit needs? The SJCOG Board will be re-evaluating the formula allocation process, especially in light of the recent passage of the FAST Act and the new requirements in this program.

3. **Possible modification of traditional FTA 5307 sub-allocations.**

Should jurisdictions within federally-designated Urbanized Areas collaborate with one another to sub-allocate apportioned funding to best meet the needs of area residents? To the extent that some jurisdictions have more funding available under historical sub-allocation formulas than they plan to use themselves, it may be appropriate to open a discussion of how the operators can coordinate to maximize utilization of federal revenues over the next ten years. In addition, the dialogue about Urbanized Area funding should include regional rail and regional bus transit service to the urbanized area.

4. **Efforts to maximize FTA 5311.** Unlike most other FTA programs, the majority of FTA 5311 funding that will flow into San Joaquin County is allocated by the State to individual applicant jurisdictions. Should SJCOG help encourage optimal use of these funds by identifying the local projects that are most likely to rank highly against the statewide criteria and supporting operators through the application process in the hopes of maximizing funding awards to the County? Should efforts be enhanced by SJCOG to solicit applications and assist potential applicants?

5. **Reexamine Policies for Allocation of State Transit Assistance (STA) funds.**

As noted previously, current SJCOG Board policy allocates a minimum of \$5,000 per year



to Escalon and Ripon, regardless of the share they are otherwise eligible to receive. Should this approach be reconsidered as part of coordinating regional policy across multiple funding sources? As part of the discussion, the SJCOC Board may also wish to consider the implications of projected trends in farebox recovery (FBR) for each transit operator. Several operators are not forecast to meet the FBR threshold required by the Transportation Development Act (TDA) during the Transit Systems Plan period, which could limit their ability to claim STA funding in future years.

6. **Reexamine Policies for allocation of Local Transportation Fund (LTF).** The subject of LTF allocations has been a complex topic of discussion since February 2015 in the San Joaquin region. LTF is a revenue source for transit, and only in cases where there are no unmet transit needs, LTF can be then be used for local streets and roads. Because of state law, rail uses take priority over other transit needs in the county and a legal opinion secured by SJCOC states that the SJCOC Board has some discretion in evaluation and apportioning those uses. To help meet the increased cost of the operations of ACE rail services, the SJCOC Board delayed adoption of the FY 16/17 LTF apportionment (in February 2016) while further discussions took place among SJCOC, local agencies, and transit agencies on the LTF apportionment. While there were many things to consider in this evaluation, some key factors included the impact (of increasing the apportionment to rail) on bus transit and local streets funding and the possibility of creating unmet transit

needs. In June 2016, the SJCOC Board approved the FY 16/17 apportionment, which changed RRC's LTF funding from \$1.3 million in the prior year (FY 15/16) to \$2.2 Million. The Board discussed the fact that future years of LTF can be discussed more comprehensively after the completion of this Systems Plan. The expectation is that more detailed information about transit needs and costs over the long term will be essential to guide future policies on LTF.

7. **Allocation of discretionary Regional Transportation Impact Fee (RTIF) funding.** The preliminary funding estimate for the Systems Plan used the simplifying assumption of a fixed distribution between bus and rail modes. This assumption, as well as the allocation of funding to the individual operator level, may be the subject of additional policy-level discussion.
8. **Confirmation of external funding sources.** Most operators have reported the use of funding sources outside of San Joaquin County purview, most of which were not explicitly forecast for the Systems Plan. In some cases, these funding sources are well-defined, but outside the jurisdiction of SJCOC. In other cases, operators reported "unspecified" or "unidentified" revenue sources in their financial plans. This is a common practice when a capital project is still a number of years away from implementation, and one or more of the anticipated funding commitments has not yet been formally secured. From now through 2024, the System Plan relies on a total of \$180 million in funding sources outside of San



Joaquin County, with almost \$5 million of these funds explicitly labeled “unspecified” or “unidentified” within the operator vignettes. To the extent that the defined external funds do not materialize, San Joaquin County will need a plan for backfilling the lost revenue. And, where operators are unable to convert unspecified revenues into future commitments, a portion of these undefined funds may ultimately be requested from the discretionary sources within the Systems Plan revenue estimate.

9. **Incorporate new project selection criteria for various competitive-based funding programs:** SJCOC Board may want to revisit new selection criteria for various state and federal funding programs for transit projects. Traditionally, the SJCOC Board has convened affected stakeholders in “Working Groups” to tackle overhauls of funding criteria and selection in its various grant programs. Should new criteria be tied to performance standards and include specific metrics to evaluate whether those standards are met?
10. **Innovative financing and/or new sales tax measure:** Traditional methods of transportation financing include gas taxes, vehicle registration fees, passenger fares, and local/regional development fees. What are some innovative ways to raising new revenue for public transportation in the San Joaquin region? A menu of alternatives may include transit impact fees, public-private partnerships, a new sales tax measure, and a long-term fix (legislative or otherwise) to dwindling state transportation revenues in California.



Source: DIY Genius

# COURSES OF ACTION

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## 1 Menu of Action Areas

The Regional Transit Vision calls for a transit network that must have the following features—reliability, accessibility, safety, convenience, and competitiveness (in terms of cost and travel time) to the automobile. In the next two years, it is crucial that the region work together, convening and collaborating with the transit operators, the general public, and city/county governments to approach transit investments strategically.

*Of course, this must include cost reductions in operations in order to sustain a more efficient and cost-effective transit system.*

This involves tackling some core “action areas” identified in this section of the Systems Plan (Figure D1). The core “action area” list is not in priority, as all areas are arguably, equally important toward sound and informed decision making. Noteworthy is the fact that some core action areas overlap in terms of the type of actions needed and themes.

This section therefore discusses a menu of action areas and implementation strategies that maximize the role of transit in the region. It involves exploring, identifying, and evaluating green innovations and non-traditional approaches to transit investment.

Figure D1: Regional Transit Vision Action Areas



Source: SJCOC



Described as “Action Areas” the following comprehensive table explores what is essential to address public transportation needs in the San Joaquin region (Table D1). In addition, the table provides details about the recommended actions which make up this work plan, identifies the lead implementers of the plan, and suggests an overall timeline to implement the action items (Figure D2).

Figure D2: Regional Transit Vision Implementation Steps



Source: SJCOC



Table D1: Menu of “Action Areas”

Action Needed	Lead Implementers	Description/Deliverables	Within 3-6 months	Within 1 year	Within 2 years
<b>Action Area #1: Collaborative Forums and Coalition Building, including Public/Private Partnerships</b>					
<b>a. Create coalitions around the region’s vital business industry clusters to discuss regional strategies and to facilitate public and/or private funding; this includes exploring/establishing partnerships with Uber/Lyft to target markets.</b>	SJCOG, transit operators, city and county governments, San Joaquin Partnership, Chamber of Commerce, Business Industry Association	<ul style="list-style-type: none"> <li>This involves identifying industries/businesses (whose employees benefit) from transit service. It seeks to explore opportunities to have a dialogue on how to strengthen the relationships and develop mutually agreed upon financial support and/or partnerships.</li> <li>Discussions should include supportive transit and roadway improvements that enhance economic competitiveness and/or revitalization of commercial corridors and strategic economic centers.</li> <li>Examine mutual areas of partnership with Uber/Lyft or taxi companies.</li> </ul>			<input checked="" type="checkbox"/>
<b>b. Develop Transit Memorandums of Understanding to articulate roles and responsibilities in planning and funding decision making.</b>	SJCOG and transit operators	<ul style="list-style-type: none"> <li>Transit Memorandums of Understanding in the San Joaquin Region are outdated with the passage of the FAST Act in December 2015. Updated MOUs can incorporate the latest changes in responsibility and regulatory guidance. It will also be an opportunity to provide more value through clearer definition of process and practices in transit planning and programming.</li> </ul>	<input checked="" type="checkbox"/>		
<b>c. Expands the funding discussion beyond just transit and develops regional (and interregional) collaboration around federal and state funding sources; requires engagement of city and county governments on the funding picture and any recommendations that will have policy implications.</b>	SJCOG, transit operators, city and county governments (includes interregional partners in other counties)	<ul style="list-style-type: none"> <li>Collaborate and convene regional (and interregional) stakeholders on impacts of transit investments on other modes and work together to identify how best to balance those needs among existing federal, state, and federal funding sources. While this process can jumpstart in a few months, it is anticipated that a “working group” of stakeholders would need to be established and meet regularly to delve into complex dialogue of funding</li> </ul>		<input checked="" type="checkbox"/>	



Action Needed	Lead Implementers	Description/Deliverables	Within 3-6 months	Within 1 year	Within 2 years
		opportunities and constraints and implications of policy development.			
<b>Action Area #2: Find Cost and Investment Efficiencies</b>					
<b>a. Prioritize maintenance and modernization projects when making investment decisions.</b>	SJCOG and transit operators	<ul style="list-style-type: none"> <li>Develop mutually agreed upon "guiding principles" for transit investments. These principles can be built into the "MOUs" (Memorandum of Understanding) that is described within this table, or also incorporated within Funding Policies/Practices. Guiding principles are not adopted policies, but rather, key themes that provide a framework to "guide" the development of policies.</li> </ul>	<input checked="" type="checkbox"/>		
<b>b. Develop evaluation criteria and performance metrics for the financing of expanded transit operations; develop multiple scenarios, one with fiscal constraints.</b>	SJCOG and transit operators	<ul style="list-style-type: none"> <li>This is more specific than merely "guiding principles". It goes into extensive detail related to the nature of specific evaluation criteria and performance benchmarks in order to finance expanded transit operations/capital expenses. Essential to this effort is the identification of additional data sources needed to examine transit systems performance, including existing data and newly developed or innovative data measures. A deliverable would be a "white paper" on metrics (or innovative models) to utilize which could be applied to policy making or funding decisions. Subject to SJCOG Board approval in an adopted budget, the funding for a proposed white paper is an eligible planning activity expense (as an activity of the Metropolitan Planning Organization). Financing could come from an array of eligible funding sources including Federal Planning funds.</li> </ul>		<input checked="" type="checkbox"/>	
<b>c. Prepare an assessment report that identifies the unique transportation issues facing the San Joaquin region's rural communities.</b>	SJCOG/SJRTD	<ul style="list-style-type: none"> <li>Explore a collaborative partnership with UC Davis Institute of Transportation Studies.</li> </ul>	<input checked="" type="checkbox"/>		
<b>d. Examine service expansion for senior and disabled residents, and for rural</b>	SJCOG and transit operators	<ul style="list-style-type: none"> <li>Related to the above area, this calls out specifically the unique needs of older/disabled/rural residents and</li> </ul>		<input checked="" type="checkbox"/>	



Action Needed	Lead Implementers	Description/Deliverables	Within 3-6 months	Within 1 year	Within 2 years
residents, in ways that are both appropriate and cost effective.		emphasizes that those measures will be different in assessing the cost-effectiveness of those needs.			
<b>e. Ensure that the region’s public transportation projects meet or exceed performance measures and ensure alignment with priorities in the Board adopted 2014 SJCOG RTP/SCS.</b>	SJCOG, transit operators, City/County local jurisdictions	<ul style="list-style-type: none"> <li>With the completion of the above evaluation criteria and performance metrics, this would be incorporated in transit MOUS as an explicit MPO/RTPA role of the SJCOG to ensure consistency with priorities in the SJCOG RTP/SCS.</li> </ul>	☒		
<b>f. Explore ability for transit operators to “pool resources”, consolidate or coordinate activities between agencies, and eliminate redundancies in order to reduce duplication and save money</b>	SJCOG and transit operators	<ul style="list-style-type: none"> <li>This action area involves the analysis of the fiscal, efficiency, and other opportunities or challenges in consolidating some areas of operations (procurement, maintenance, etc). Conceptually, consolidation of some transit services, or even some “back to the basics” coordination of simple activities between agencies, should have the benefit of reducing duplication and saving money. The concept of a Consolidated Transit Services Agency will be key to explore here.</li> </ul>		☒	
<b>Action Area #3: Improve the Fiscal Health of Transit</b>					
<b>a. Strengthen efforts on financial oversight on transit budgets.</b>	SJCOG and transit operators	<ul style="list-style-type: none"> <li>Perhaps through the Transit MOU or other mechanism, work with transit operators to discuss how to improve financial oversight of transit costs, expenditures, and work pro-actively in troubleshooting shortfalls so there are no surprises.</li> </ul>		☒	
<b>b. Identify innovations to reduce operations cost.</b>	SJCOG and transit operators	<ul style="list-style-type: none"> <li>With some overlap in core areas of consolidation activities and convening partners, explore innovations to reduce ongoing costs.</li> </ul>		☒	
<b>c. Examine ways to increase farebox recovery.</b>	SJCOG and transit operators	<ul style="list-style-type: none"> <li>The farebox recovery ratio is the percentage of the total transit agency operating budget that comes from transit ticket revenue. It often describes strictly fare payment but can include other income such as advertising, which generally makes up a small amount of overall self-</li> </ul>		☒	



Action Needed	Lead Implementers	Description/Deliverables	Within 3-6 months	Within 1 year	Within 2 years
		generated revenue. Dialogue needs to begin on whether there should be performance targets for farebox recovery tied to funding (beyond existing metrics) and an outline or dialogue on best practices to increase farebox recovery for transit agencies. Another possible (additional) performance metric may include passengers per revenue hour.			
<b>d. Examine additional commuter passenger rail service to serve new markets or enhance service to current markets.</b>	SJCOG and rail transit operator	<ul style="list-style-type: none"> <li>Draft a white paper on the specific issues related to commuter rail expansion and the feasibility of expanding train service.</li> </ul>		<input checked="" type="checkbox"/>	
<b>e. Coordinate development of Short Range Transit Plans</b>	Transit Operators	<ul style="list-style-type: none"> <li>Synchronize development of Short Range Transit Plans and establish "consistency standards" with the time span of the plans so that accurate and current data is available to make informed funding decisions.</li> </ul>		<input checked="" type="checkbox"/>	
<b>f. Identify alternative methods to "green" the system, such as quieter pavements, cleaner vehicles, and lower energy equipment where cost effective.</b>	SJCOG and transit operators and City/County local jurisdictions, private sector	<ul style="list-style-type: none"> <li>Proactively engage private sector to learn more about innovations that can and/or create a transit forum of regular information exchange of the region's operators.</li> </ul>		<input checked="" type="checkbox"/>	
<b>Action Area #4: Modernize the Region's Transit System and Foster Environmental Benefits through Cost-Effective Strategies</b>					
<b>a. Enhance carpooling/vanpooling interconnectivity, making transit more time competitive with driving alone.</b>	SJCOG, Transit operators	<ul style="list-style-type: none"> <li>Although this is previously discussed in the "first and last mile", this area emphasizes the need to further strengthen the relationship between SJCOG Commute Connection (Transportation Demand Management) Program and transit operators.</li> <li>A recent launch of an interactive online travel tool by Commute Connection is an example of modernization and more opportunities to incorporate this with transit operators is emphasized in this core area.</li> </ul>	<input checked="" type="checkbox"/>		
<b>b. Examine enhancements to the transit customer experience to make transit easier, safety, and more enjoyable to use.</b>	Transit operators	<ul style="list-style-type: none"> <li>Explore the enhancement of station amenities, increase the use of real-time information, and explore innovations in vehicle design (for example, interior design, seat availability and comfort, and Wi-Fi Connections).</li> </ul>		<input checked="" type="checkbox"/>	



Action Needed	Lead Implementers	Description/Deliverables	Within 3-6 months	Within 1 year	Within 2 years
<b>c. Newer technologies (or new concepts) that attract new market segments to public transportation.</b>	Transit Operators	<ul style="list-style-type: none"> <li>Identify new technologies in capital investments that can improve the convenience and travel speeds of bus and rail services.</li> </ul>			<input checked="" type="checkbox"/>
<b>d. Explore and Implement (when feasible and cost-effective) new service types designed to attract new riders to transit or provide other public transportation options.</b>	Transit operators	<ul style="list-style-type: none"> <li>This may include examination of innovative concepts for the region. Examples include:                             <ul style="list-style-type: none"> <li>Employer shuttles provided from transit to major employment centers.</li> <li>Privately operated jitney or taxi services that provide for shared rides and integrated fares.</li> <li>Car sharing and station car programs and services that provide on-demand access to shared vehicles for short trips to and from the transit station.</li> <li>Casual carpooling for informal "on-the-spot" rides to and from transit stops.</li> </ul> </li> </ul>		<input checked="" type="checkbox"/>	
<b>Action Area #5: Implement supportive land use planning</b>					
<b>a. Improve transit connections and access in key urban areas and key rural areas by coordinating planning decisions with affected transit operators.</b>	Transit Operators	<ul style="list-style-type: none"> <li>This involves regional (and interregional) coordination of all transit operators to build in system enhancements of high-frequency services (and improved connections) on many of the existing local bus routes in urban core areas and key rural areas. The coordination should also include identification or enhancements of park and ride and transit centers. This consultative process should be incorporated, as a matter of practice, in Short Range Transit Plans developed by each transit operator.</li> </ul>		<input checked="" type="checkbox"/>	
<b>b. Expand on the characteristics of "high quality transit areas" along high-demand corridors, including impacts, investments, and related co-existence</b>	SJCOG, RTP Implementation Committee, transit operators	<ul style="list-style-type: none"> <li>It is a fact that long-term viability of transit routes and investments depends heavily on surrounding land uses and nearby communities. Factors in this analysis include shared costs of infrastructure and articulation of an investment strategy built from a collaborative vision on types of investments (i.e. dedicated bus lanes, location of stops). Working with the RTP/SCS Implementation Committee, more analysis should be done on the "high quality transit areas" in the RTP/SCS and how these can influence the decision making process for transit planning and funding.</li> </ul>		<input checked="" type="checkbox"/>	



Action Needed	Lead Implementers	Description/Deliverables	Within 3-6 months	Within 1 year	Within 2 years
<b>c. Examine commuter express services designed to provide very limited stop connections to major employment centers.</b>	SJCOG, transit operators, Business Industry	<ul style="list-style-type: none"> <li>Related to the above, identify major employment centers and collaborate on a transit system that better moves employees to those centers and can be a competitive option to the car. This should be looked at in detail within the operator's Short Range Transit Plans.</li> <li>Coordinate this planning activity with other alternative strategies (for commuters) such as carpooling, bicycling.</li> </ul>		<input checked="" type="checkbox"/>	
<b>d. Coordinate with local governments to develop "first-mile/last-mile" solutions, reducing the difficulty or impracticality of transit.</b>	Transit Operators, City/County Governments, SJCOG	<ul style="list-style-type: none"> <li>One of the main reasons people do not use transit is due to the challenge of getting to and from a transit stop or station. Auto-oriented land use patterns, lack of sidewalks or bicycle facilities, or a disconnected street network with significant gaps between sidewalks/bicycle lanes are common barriers to transit access. Long distances between trip origins and transit stations ("first-mile") or transit stations and trip destinations ("last-mile") all create significant hurdles for both transit users and transit vehicles.</li> <li>Work with local governments to collaborate on transit stations location and site planning, feeder-distributor bus/shuttle routes, enhanced pedestrian crosswalks near transit stations, bicycle lanes that connect to transit and bike parking at transit stations.</li> </ul>			<input checked="" type="checkbox"/>
<b>e. Identify opportunities for intermodal connections (first and last mile)</b>		<ul style="list-style-type: none"> <li>Related to the point, this action item focuses on first and last mile connections that involve access to networks for carpooling (ridesharing), bicycling, or private sector service (i.e. Lyft/Uber.)</li> </ul>			<input checked="" type="checkbox"/>
<b>Action Area #6: Examine funding policy changes and identify inefficiencies in grant selection and process</b>					
<b>a. Develop a work plan to identify specific funding programs to examine and identify funding specific strategies to guide these investments.</b>	SJCOG, transit operators, City/County local jurisdictions	<ul style="list-style-type: none"> <li>Explore and make recommendations about modifying certain apportionment formulas, project selection criteria, and grant requirements on various funding programs in order to invest strategically in transit.</li> <li>Prior to this, it is important to re-examine the transit future needs and make sure that cost cutting measures</li> </ul>			<input checked="" type="checkbox"/>



Action Needed	Lead Implementers	Description/Deliverables	Within 3-6 months	Within 1 year	Within 2 years
		will not bring the future expenditures within available future revenues.			
<b>b. Investigate the use of other funding sources or innovative strategies.</b>	SJCOG	<ul style="list-style-type: none"> <li>Research and discuss best practices, innovative strategies utilized by other agencies, or emerging developments in funding that can help bring more cost efficiencies to the transit system.</li> </ul>		<input checked="" type="checkbox"/>	
<b>c. Explore the possibility of putting an additional sales tax measure on the ballot for 2018.</b>	SJCOG	<ul style="list-style-type: none"> <li>The fiscal reality is that there are more transit needs than there is revenue. SJCOG Board of Directors may need to start discussing the concept of an additional sales tax measure and propose how much of the measure should be for local streets and roads and for transit.</li> </ul>	<input checked="" type="checkbox"/>		
<b>d. Harmonize state and federal grant and program requirements to support more comprehensive approaches to policy decisions and capital investments.</b>	SJCOG	<ul style="list-style-type: none"> <li>Look into the possibility of a more comprehensive funding process that fosters better targeting of investment so there are more efficient expenditures. SJCOG's current funding process are individual "call for projects" for various grant programs. Other MPOs combine their state/federal programs and conduct fewer calls for projects. This action area examines the ability for SJCOG to develop a "comprehensive" funding program or, in other words, consolidate funding cycles. The result should be reduced staff time and cost savings to prepare grant applications and, again, an overall targeted investment strategy.</li> </ul>		<input checked="" type="checkbox"/>	

# **NEXT STEPS FOLLOWING PUBLIC COMMENT ON THE PLAN**





## 1 Public Input and Policy Development

The preceding chapters in the Systems Plan were part of the draft document. *Chapter E: Next Steps Following Public Comment on the Plan* provides an overview of the public outreach process for the Systems Plan, *post release* of the draft document. The inclusion of “Chapter E” came out of the need to document the extensive policy discussion during the review of the draft Systems Plan. The feedback includes comments and discussion on the public draft document (of the Systems Plan) from July 1, 2016 through October 31, 2016 as well as related workshops and committees. With supporting documents in Appendix D, this chapter provides a comprehensive overview of the key discussion topics leading to a proposal of immediate next steps following Board adoption of the Systems Plan.

### Overview of the Public Outreach Process

The San Joaquin Council of Governments began a formal public outreach and comment process for the draft document of the Systems Plan when the draft document was released to the public on July 1, 2016. The components of the public outreach strategy are as follows:

1. 30-Day Formal Public Review of the Draft Document from July 1, 2016 to August 1, 2016.
2. Two public workshops.
3. Three workshops for the SJCOG Board of Directors (which were open to the public).
4. Technical and policy discussions of the Systems Plan at SJCOG Committees from July to October 2016.
5. Updates and requests for input/direction from the SJCOG Board of Directors from July to October 2016.

Please refer to Appendix D for supporting documents on the outreach process including:

- Comprehensive overview of the public outreach process and summary of public workshops.
- Responses to comments received on the draft Systems Plan during the 30-day formal review and comment period.
- Flyers advertising 2 public workshops and 3 SJCOG Board workshops.
- Copies of SJCOG Board staff reports discussing the Systems Plan from July to October 2016 (which includes Committee input on the respective discussion that month.)

### Highlights of Comments Received on the Systems Plan

There were some technical changes in the plan (which did not make any substantive changes in its findings and content.) The majority of the comments on the Systems Plan focused on whether there was complete information to formulate sound transit funding policy. This was a comment that resonated from city/county agency staff, executive management of cities/county municipal governments and transit operators, and policy makers (i.e. elected officials, SJCOG Board members).

Many reviewers of the Systems Plan acknowledged that there was a lot of technical information within the draft document. However, SJCOG received many comments that ultimately demonstrated that the Plan did not bring stakeholders any closer in identifying immediate



solutions to address the public transit funding shortfall described in the Systems Plan.

Some of the comments raised are described as follows (the list is not in any priority order):

- Concerns about the need for more technical information on transit costs/needs and what potential cuts may happen if the shortfall is not eliminated.
- Question regarding how can future transit innovations reduce transit costs (example, Uber/Lyft service, driverless cars)?
- Questions about why don't transit agencies live within their means?
- Identify the value of coordinating transit among operators.
- Difficulty in fully understanding the complexity of federal and state funding pots for public transportation (how were the funds derived, what existing policies are in place, who determines those policies, what projects have been funded with that source of funding). In response to this, SJCOC prepared a Primer on the primary transit funding "pots" as part of the October SJCOC Board staff report (Appendix D).
- Concern by cities and county on the impacts to other transportation needs--specifically local streets and road repairs—that will be directly impacted by funding policies related to Local Transportation Fund (LTF) Program.

- Systems Plan fell short of emphasizing that the Local Transportation Fund was a revenue source for public transit, first and foremost, and only intended for local street repairs needs if there are no unmet transit needs.
- Transit agencies must have reliable and defined revenue sources (for transit) to build, plan and expand transit systems.
- Continual questions about the value (or "community benefit") of regional transit (both rail and bus transit) to cities and the related costs of existing and future service.
- Plan did not go far enough in articulating that transit financing of regional transit service was the pro-active strategy to prevent/eliminate any unmet transit needs that are reasonable to meet.
- Recognition that public transit is a valued transportation alternative in the San Joaquin region and there must be funding policy to balance intercity and intra-city transit needs.

*The question of "how can public transit agencies live within its means" proved to be complex. Just scratching on the surface, it raised the question of how much transit is essential in the region in the next ten years? And, how can transit agencies plan for long-term system enhancements when funding policies are established annually for many funding programs and when one transit fund source was financing local streets and roads?*



Even more complicated became the discussion of possible “funding policy” scenarios intended to flush out limitations, constraints, and opportunities in policy development. None of the draft funding scenarios achieved any level of consensus among the stakeholders (cities, county, public transit agencies).

A myriad of questions on funding policy included:

- Should the region phase Local Transportation Fund to eliminate the use for local streets and roads in the next five years?
- Should federal “urbanized area” funding for Lodi, Tracy, and Manteca UZAs provide funding for intercity bus transit and rail transit service? If so, what is the appropriate/fair apportionment of funds?
- What is the best timing for consideration of a “Measure K 3.0”? And if put forward, should the measure be structured to offer a multimodal funding source (to include public transit) while primarily focusing on local streets and roads?
- What are the opportunities for transit coordination to reduce/eliminate cost inefficiencies and streamline services between local and regional transit operators?
- How can funding policy be structured with minimal impacts to local streets and roads?
- How can a “community benefit” assessment be calculated?

With four months of discussion on the draft Plan between July and October 2016, SJCOC staff concluded that a dramatic shift in the approach to funding policy development may need to be considered.

This dramatic shift, called by SJCOC staff as a “back to the basics” proposal, was presented to SJCOC Committees and SJCOC Board in October 2016 for discussion (refer to Board staff report, dated October 2016 in Appendix D). The proposal focused not on exact funding policy scenarios, but rather, on a collaborative process that would ultimately lead to funding policy. There was positive feedback for some fundamental “rules of engagement”, and therefore, SJCOC is presenting the recommendations below as part of the final Systems Plan.

### Recommendation for Immediate Next Steps Following SJCOC Board Adoption of the Systems Plan

#### *Underlying Framework for Consideration*

The difficulty in moving forward on funding policy was predicated on two hurdles that needed to be overcome. It was hard to effectively make changes in Local Transportation Fund apportionment from member jurisdictions when all of the LTF in the Regional Transit District boundaries is not used for public transit. The RTD boundaries are the City of Stockton and the unincorporated area. City of Stockton uses 100 percent for public transit; however, the unincorporated area divides 76 percent of their apportionment to public transit and retains 24 percent for local streets and roads. Until RTD and the County reviewed their joint agreement on LTF, there is an impasse on



dialogue about reductions in the LTF apportionment (to local streets and roads) from the cities in the region.

The other challenge was that city (and county) municipal agencies raised the need for both better collaborations on intercity transit planning and enhanced understanding of the community benefit of intercity bus transit service and rail to their respective communities. A 1993 adopted resolution by the Transit District (then known as Stockton Metropolitan Transit District), outlined the parameters of operations with cities (Refer to October 2016 Board Staff Report in Appendix D). There can be great value in re-visiting the key business points within the resolution about roles/responsibilities/expectations between RTD and its partners in the provision of transit service.

#### **Formulation of Ad Hoc Committee with a multi-faceted mission**

Once those areas are addressed, the climate can be favorable for the formation of an Ad Hoc Committee comprised of city managers, the county administrator, and the CEOs of RTD and ACE. SJCOG staff, in coordination with technical staffs of the stakeholder agencies, would assist the Committee in the provision of technical information or follow through on information requests.

*The Systems Plan's immediate recommendation is for the Ad Hoc Committee to hold its first meeting in January 2017 and establish a mission and work plan addressing (1) Transit Coordination and then (2) Public Transit Funding Policy Development.*

The deliverables from the committee include the following:

1. Commitment and execution of MOUs/Master Agreements with RTD and ACE about the parameters of operations in transit planning and funding.
2. Analysis and recommendation on transit coordination efficiencies and cost savings. This may vary community to community and not be a one-size fits all for the region. As an example, one community may benefit from RTD overseeing vehicle maintenance or dispatch while it may not be the best fit (for coordination) in another community.
3. Make recommendations for the Board's consideration in addressing the public transportation funding needs in the San Joaquin region; recommendations would cover the ten-year span of the Systems Plan (through 2024) and may be presented as short, mid, and long-term policies.

## **Conclusion**

This "back to the basics" recommendation brings the executive leadership of the SJCOG member agencies and regional bus/rail transit operators to the same table. It underscores the commitment of all stakeholders to find cost-effective solutions to transit service delivery that keeps pace with growing communities. The benefit of this approach is an equal role of the key stakeholders in developing funding policies for the SJCOG Board, enabling comprehensive and informed decision-making about transit financing in the next ten years.

# APPENDIX

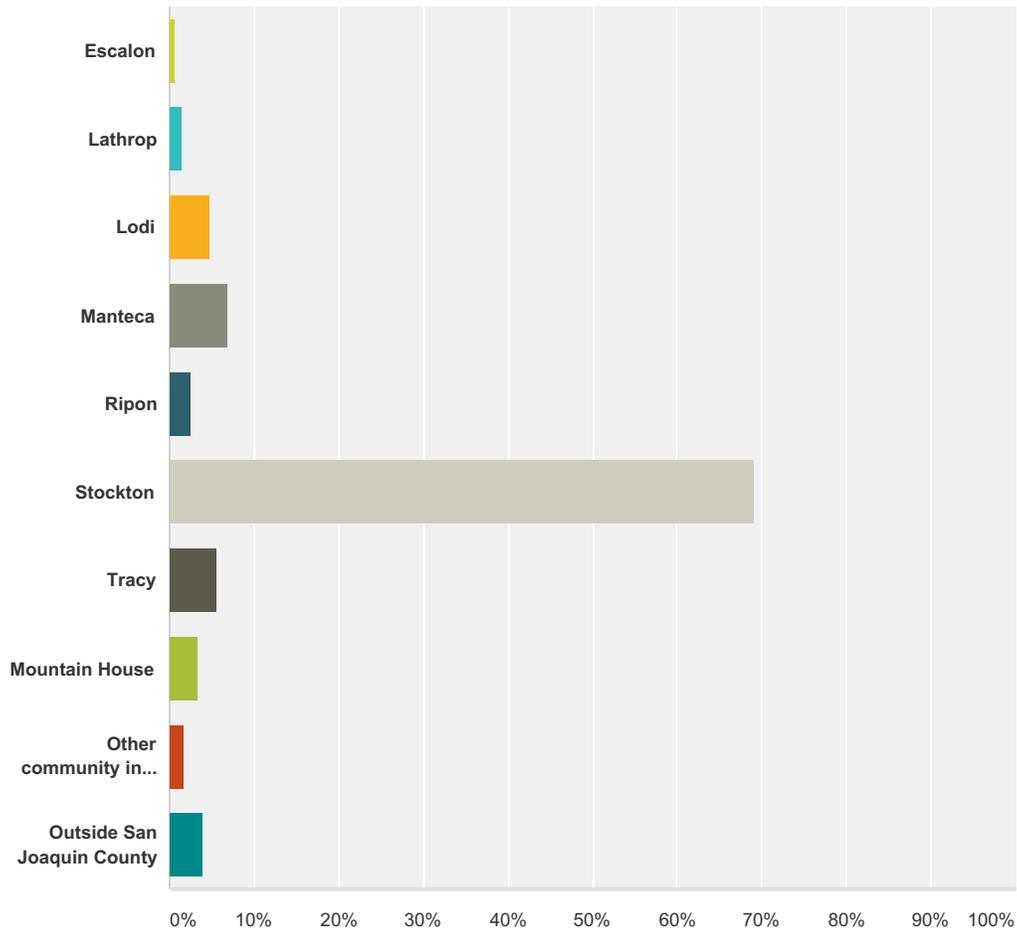




APPENDIX A

Q1 What community do you live in?

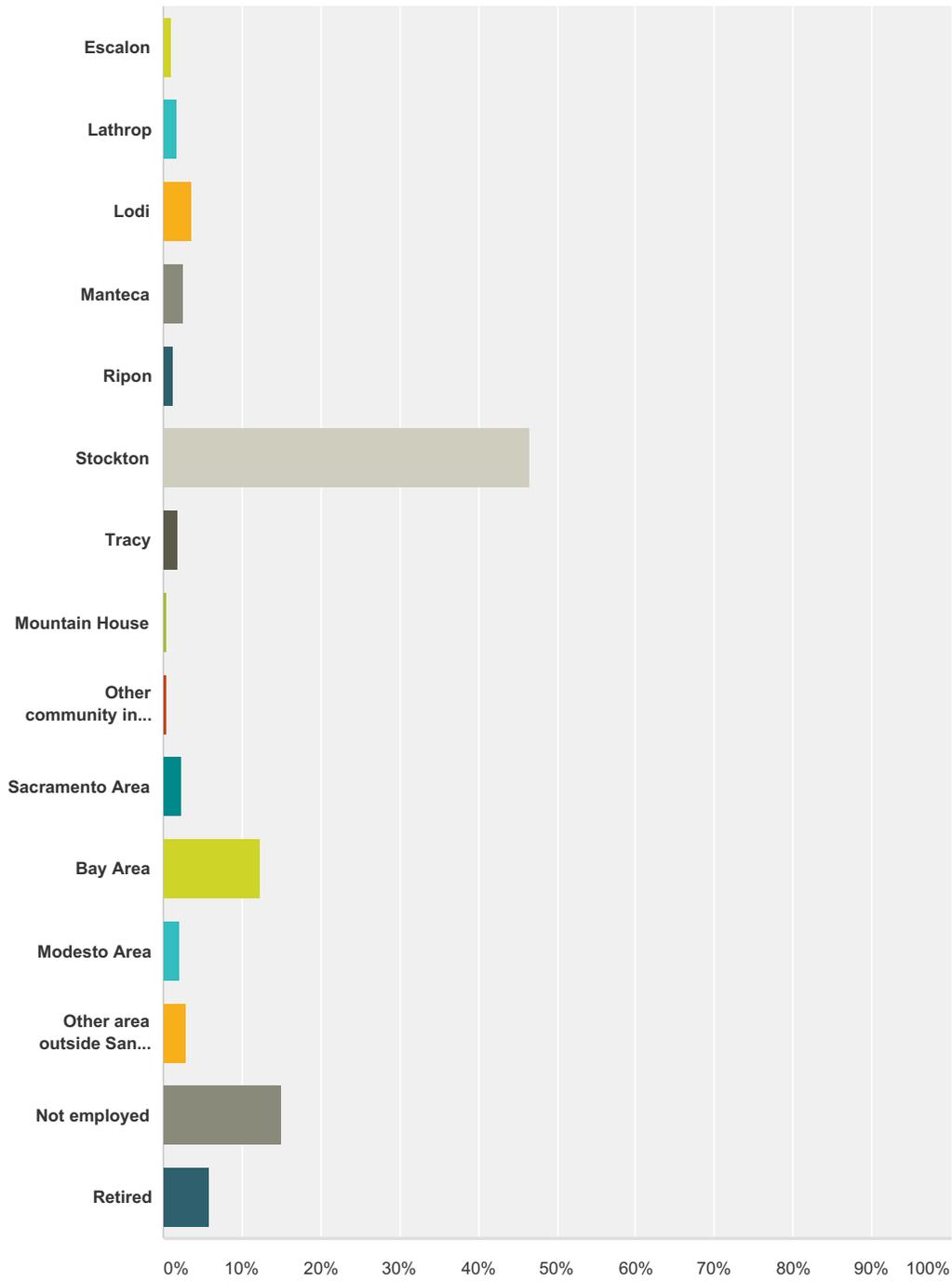
Answered: 423 Skipped: 0



Answer Choices	Responses	
Escalon	0.71%	3
Lathrop	1.42%	6
Lodi	4.73%	20
Manteca	6.86%	29
Ripon	2.60%	11
Stockton	69.03%	292
Tracy	5.67%	24
Mountain House	3.31%	14
Other community in San Joaquin County	1.65%	7
Outside San Joaquin County	4.02%	17
<b>Total</b>		<b>423</b>

## Q2 What community do you work in?

Answered: 423 Skipped: 0

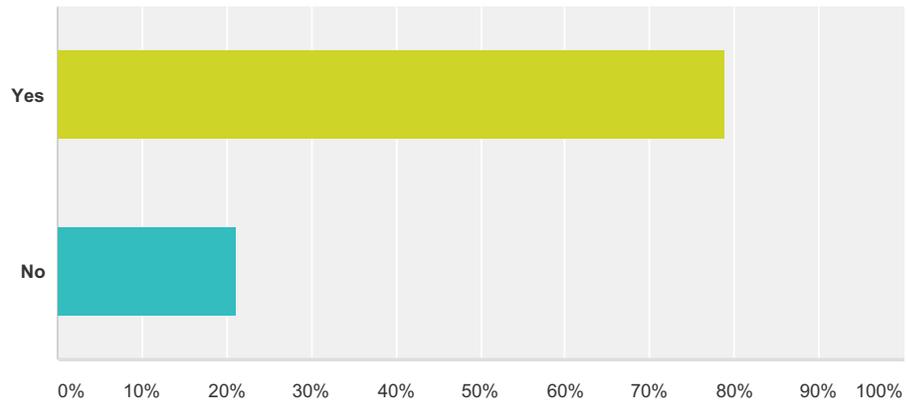


Answer Choices	Responses
Escalon	0.95% 4
Lathrop	1.65% 7
Lodi	3.55% 15
Manteca	2.60% 11

Ripon	1.18%	5
Stockton	46.57%	197
Tracy	1.89%	8
Mountain House	0.47%	2
Other community in San Joaquin County	0.47%	2
Sacramento Area	2.36%	10
Bay Area	12.29%	52
Modesto Area	2.13%	9
Other area outside San Joaquin County	2.84%	12
Not employed	15.13%	64
Retired	5.91%	25
<b>Total</b>		<b>423</b>

### Q3 Do you currently use public transit?

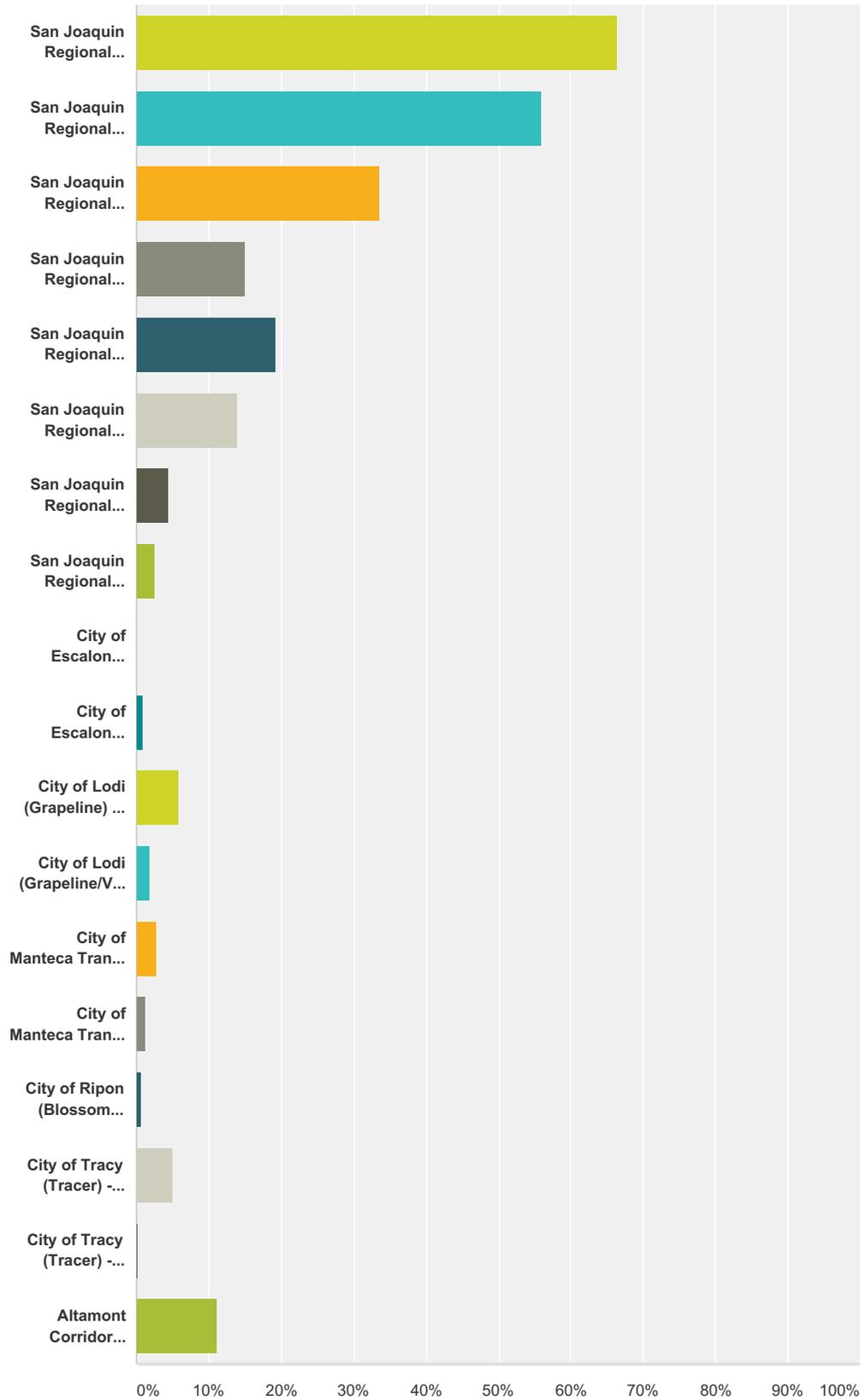
Answered: 423 Skipped: 0



Answer Choices	Responses
Yes	78.96% 334
No	21.04% 89
<b>Total</b>	<b>423</b>

**Q4 What types of public transit do you currently use? Check all that apply.**

Answered: 324 Skipped: 99



Answer Choices	Responses
San Joaquin Regional Transit District (RTD) - Metro Express (Stockton)	66.36% 215
San Joaquin Regional Transit District (RTD) - Fixed Route (within Stockton)	55.86% 181

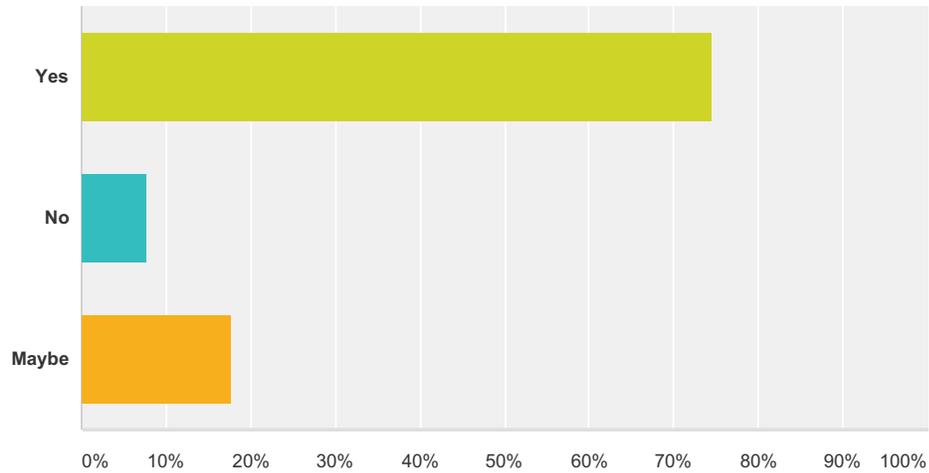
San Joaquin Regional Transit District (RTD) - Metro Hopper	33.64%	109
San Joaquin Regional Transit District (RTD) - County Hopper	15.12%	49
San Joaquin Regional Transit District (RTD) - Intercity (Route 23 to Lodi)	19.14%	62
San Joaquin Regional Transit District (RTD) - Commuter bus to Bay Area	13.89%	45
San Joaquin Regional Transit District (RTD) - Commuter bus to Sacramento Area	4.32%	14
San Joaquin Regional Transit District (RTD) - Dial-A-Ride	2.47%	8
City of Escalon (E-Trans) - Deviated Fixed Route	0.00%	0
City of Escalon (E-Trans) - Dial-A-Ride	0.93%	3
City of Lodi (Grapeline) - Fixed Route	5.86%	19
City of Lodi (Grapeline/Vineline) - Dial-A-Ride	1.85%	6
City of Manteca Transit - Fixed Route	2.78%	9
City of Manteca Transit - Dial-A-Ride	1.23%	4
City of Ripon (Blossom Express)	0.62%	2
City of Tracy (Tracer) - Fixed Route	4.94%	16
City of Tracy (Tracer) - Dial-A-Ride	0.31%	1
Altamont Corridor Express (ACE) Train	11.11%	36
<b>Total Respondents: 324</b>		

#	Other (please specify)	Date
1	Amtrak to Bay Area	2/4/2016 7:15 PM
2	BART, Wheels, MAX, Amtrak	1/17/2016 8:18 PM
3	your bus when it runs regulary	1/14/2016 7:32 AM
4	Alternate between ACE and RTD whenever disgust prompts the change.	1/6/2016 1:47 PM
5	93	1/6/2016 8:20 AM
6	Santa Clara Valley Transit	12/27/2015 11:15 PM
7	Rural Route 554 to Mountain House-Tracy Campus of Delta College	12/16/2015 2:43 PM
8	Amtrak because it takes me directly into the Bay (rather than Dublin) and also operates on weekends	12/14/2015 2:11 PM
9	and modesto	12/6/2015 12:21 PM
10	bus	11/26/2015 8:07 PM
11	BART	11/17/2015 12:00 PM
12	BART, Sacramento Regional Transit, SCT/Link (Galt)	11/12/2015 6:41 PM
13	Stop being late every day for once call in when running late	10/19/2015 7:56 PM
14	BART	10/16/2015 9:41 AM
15	Wheels Bus	9/28/2015 10:14 AM
16	RTDBUS45 RTD BUS305	9/24/2015 9:30 AM
17	don't know yet, just moved here	9/23/2015 8:36 AM
18	Route 90, Tracy to Delta College	9/14/2015 8:37 PM
19	Bart...Amtrak	9/13/2015 12:22 PM
20	Have to drive but would love to take either the ACE train or RTD commuter bus	9/10/2015 6:39 PM

21	sanjoaquinrtsrtd	9/4/2015 2:05 PM
22	cab because bus don't run late	8/25/2015 9:52 AM
23	nothing else yet	8/24/2015 4:27 PM
24	Amtrak San Joaquin Line	8/19/2015 2:31 PM
25	BART, Sacramento Regional Transit, SCT/Link (Galt)	8/19/2015 9:23 AM
26	BART	7/28/2015 9:25 AM
27	County of Sacramento - South County Transit Link (Lodi - Galt - Cosumnes River College)	7/25/2015 8:04 PM

### Q5 Would you use public transit if it was more convenient to you and cheaper than driving?

Answered: 90 Skipped: 333



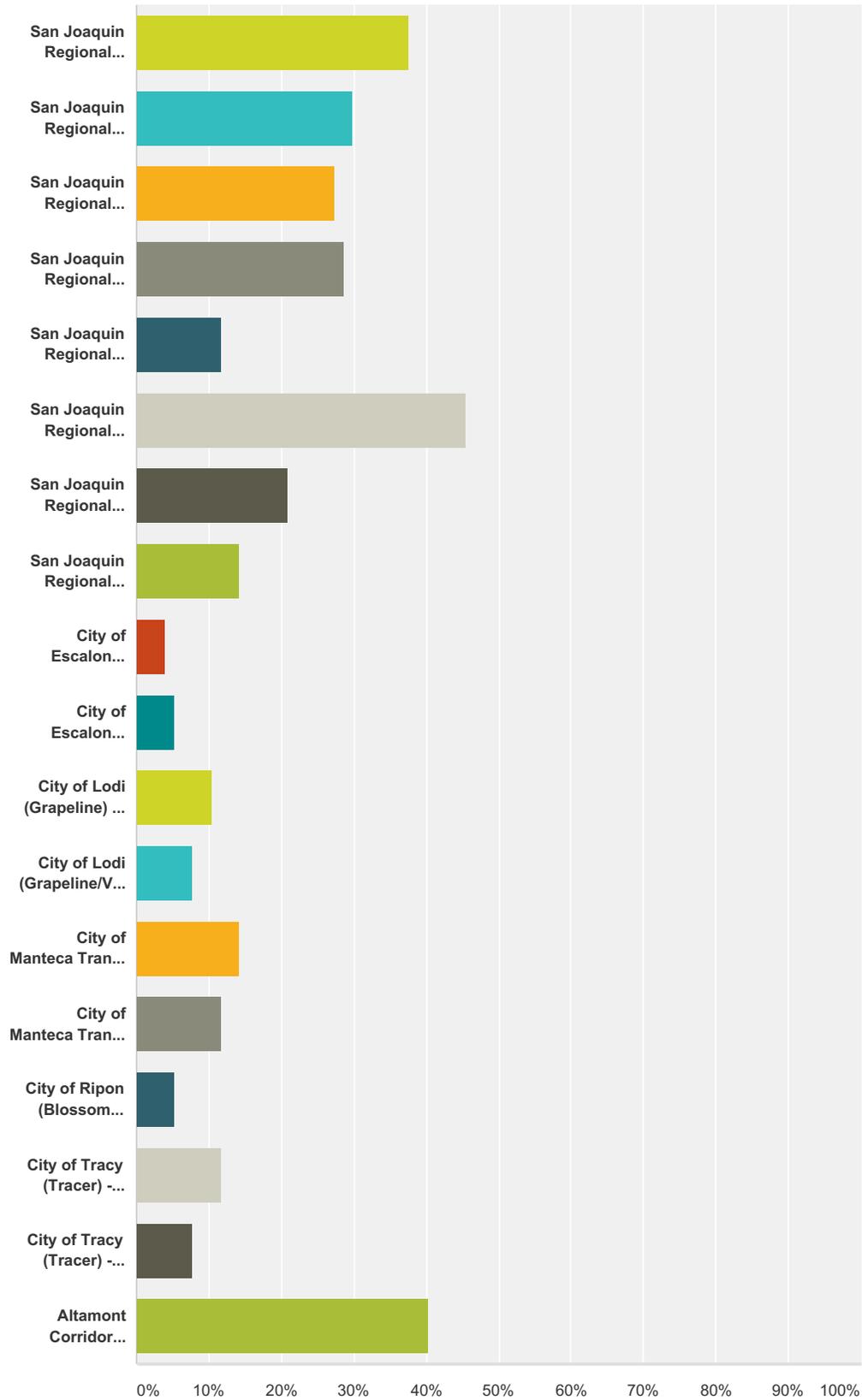
Answer Choices	Responses	
Yes	74.44%	67
No	7.78%	7
Maybe	17.78%	16
<b>Total</b>		<b>90</b>

#	Comments	Date
1	I ride my bike its super cheaper and I don't need Driver Lic,Ins and Regist. Government have got way to big. Government Socialism is a failing system.	2/5/2016 4:08 PM
2	Need Weston Ranch to SJ General Hospital	1/8/2016 9:22 PM
3	Big fan of rail but not so sure about buses	1/4/2016 9:13 PM
4	and if I can get a hold of someone. Email doesn't work and the 888-802-9675 always has a busy signal	1/4/2016 9:50 AM
5	if there was some type of light rail or BART that connected Stockton to Sacramento I would use it everyday	12/22/2015 10:52 PM
6	North Stockton departure would be a plus.	11/28/2015 10:14 PM
7	Also, if I no longer had my carpool.	11/12/2015 1:56 PM
8	Is there bus service on Monday October the 12th, 2015 in Stockton, California?	10/11/2015 11:53 AM
9	I was using public	9/28/2015 8:28 AM
10	Trying to use dial a ride	9/23/2015 2:53 PM
11	I would love to.	9/22/2015 9:42 AM
12	Being in Ripon feels like I am an after-thought to anyone scheduling service.	9/16/2015 10:01 AM
13	Public transport is always good and cheaper & safe than others	9/10/2015 4:24 PM
14	More frequent commuter buses during rush hour	8/27/2015 1:31 PM
15	The challenge is coordinating Central Valley transit with Bay Area transit. Plus 511.org transit planner only shows Bay Area transit and ACE. Nothing about RTD busses or CA Amtrak busses.	8/26/2015 10:28 PM

16	To many stops between stockton to Livermore	8/26/2015 6:40 AM
17	I absolutely would take public transit if it's convenient, safe bus stops, and cheaper	8/4/2015 9:51 PM
18	I don't mind the current fare. Think it's reasonable given gas prices, Stockton's sprawl, etc.	8/3/2015 8:52 AM
19	And please--why do routes disappear on Holidays? What about events and parades taking place??	7/29/2015 3:30 PM
20	This would make a great addition to our community.	7/28/2015 12:47 PM

**Q6 What types of public transit would you consider using if it was more convenient to you and cheaper than driving? Check all that apply.**

Answered: 77 Skipped: 346



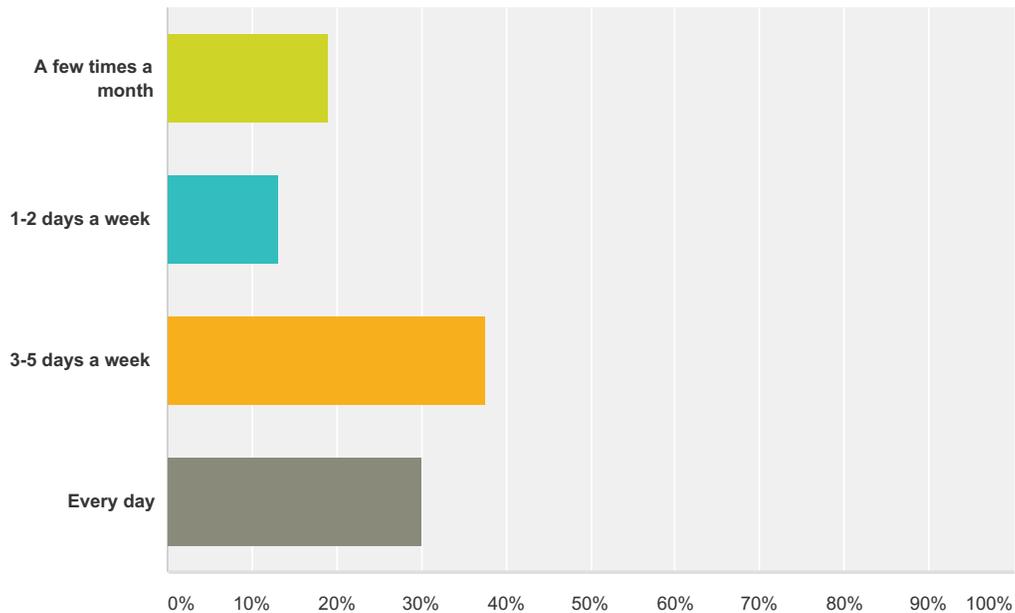
Answer Choices	Responses
San Joaquin Regional Transit District (RTD) - Metro Express (Stockton)	37.66% 29
San Joaquin Regional Transit District (RTD) - Fixed Route (within Stockton)	29.87% 23

San Joaquin Regional Transit District (RTD) - Metro Hopper	27.27%	21
San Joaquin Regional Transit District (RTD) - County Hopper	28.57%	22
San Joaquin Regional Transit District (RTD) - Intercity (Route 23 to Lodi)	11.69%	9
San Joaquin Regional Transit District (RTD) - Commuter bus to Bay Area	45.45%	35
San Joaquin Regional Transit District (RTD) - Commuter bus to Sacramento Area	20.78%	16
San Joaquin Regional Transit District (RTD) - Dial-A-Ride	14.29%	11
City of Escalon (E-Trans) - Deviated Fixed Route	3.90%	3
City of Escalon (E-Trans) - Dial-A-Ride	5.19%	4
City of Lodi (Grapeline) - Fixed Route	10.39%	8
City of Lodi (Grapeline/Vineline) - Dial-A-Ride	7.79%	6
City of Manteca Transit - Fixed Route	14.29%	11
City of Manteca Transit - Dial-A-Ride	11.69%	9
City of Ripon (Blossom Express)	5.19%	4
City of Tracy (Tracer) - Fixed Route	11.69%	9
City of Tracy (Tracer) - Dial-A-Ride	7.79%	6
Altamont Corridor Express (ACE) Train	40.26%	31
<b>Total Respondents: 77</b>		

#	Other (please specify)	Date
1	Visit San Francisco Embargado	2/1/2016 6:48 AM
2	French Camp	1/8/2016 9:23 PM
3	Some type of light rail or BART	12/22/2015 10:53 PM
4	There isn't one that would take me there. i'd take a train or bus if possible.	12/8/2015 4:30 PM
5	Linden transit or Linden Dial-A-Ride	11/16/2015 10:07 AM
6	Amtrak	11/12/2015 1:56 PM
7	Any public transport	9/10/2015 4:35 PM
8	California Amtrak Truway Bus, Wheels Bus	8/26/2015 10:29 PM
9	Transit to Modesto	8/12/2015 4:56 PM
10	More frequency	8/9/2015 11:29 PM
11	I'd pretty much use everything as sometimes I need to travel around for work and personal trips. However, I am not sure about the routes and how they work.	8/3/2015 8:55 AM
12	Commuter bus to North Bay/Fairfield	7/31/2015 11:22 AM
13	MH to Bart Shuttle, don't want to drive 12mi RT to go to Tracy	7/30/2015 9:53 AM

### Q7 How often do you use (or would you use) public transit?

Answered: 388 Skipped: 35

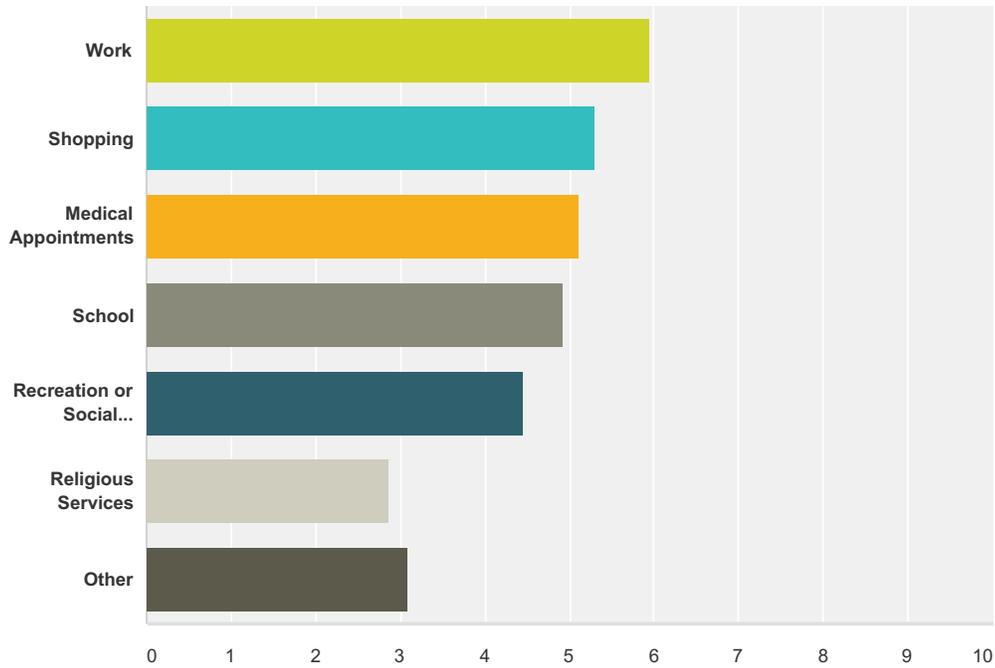


Answer Choices	Responses
A few times a month	19.07% 74
1-2 days a week	13.14% 51
3-5 days a week	37.63% 146
Every day	30.15% 117
<b>Total</b>	<b>388</b>

#	Other (please specify)	Date
1	use public transportation in summer in bay area	2/20/2016 3:54 PM
2	No set amt, sometimes 3~5 times a week, sometimes 1-2 days a week.	2/13/2016 11:40 PM
3	once or twice	2/11/2016 1:51 PM
4	Occasionally. Would use ACE more if it ran on non-commuter hours	1/4/2016 9:14 PM
5	Dr's in Modesto	12/6/2015 12:23 PM
6	No convenient route	9/16/2015 2:40 PM
7	I would use the bus more, but I run the risk of getting stuck in downtown Stocton with nothing more to do but wait, sometimes for hours	9/16/2015 10:04 AM
8	I would use t daily if they had more convient schedules	8/27/2015 1:33 PM
9	it's my only means of trans/or walk---I'm old&with a walker	8/24/2015 4:35 PM
10	when my car breaks down	8/14/2015 1:45 PM
11	rarely as I'm retired	7/29/2015 3:33 PM

**Q8 What are the activities you use public transit for the most? Please rank #1 being the most often, et cetera.**

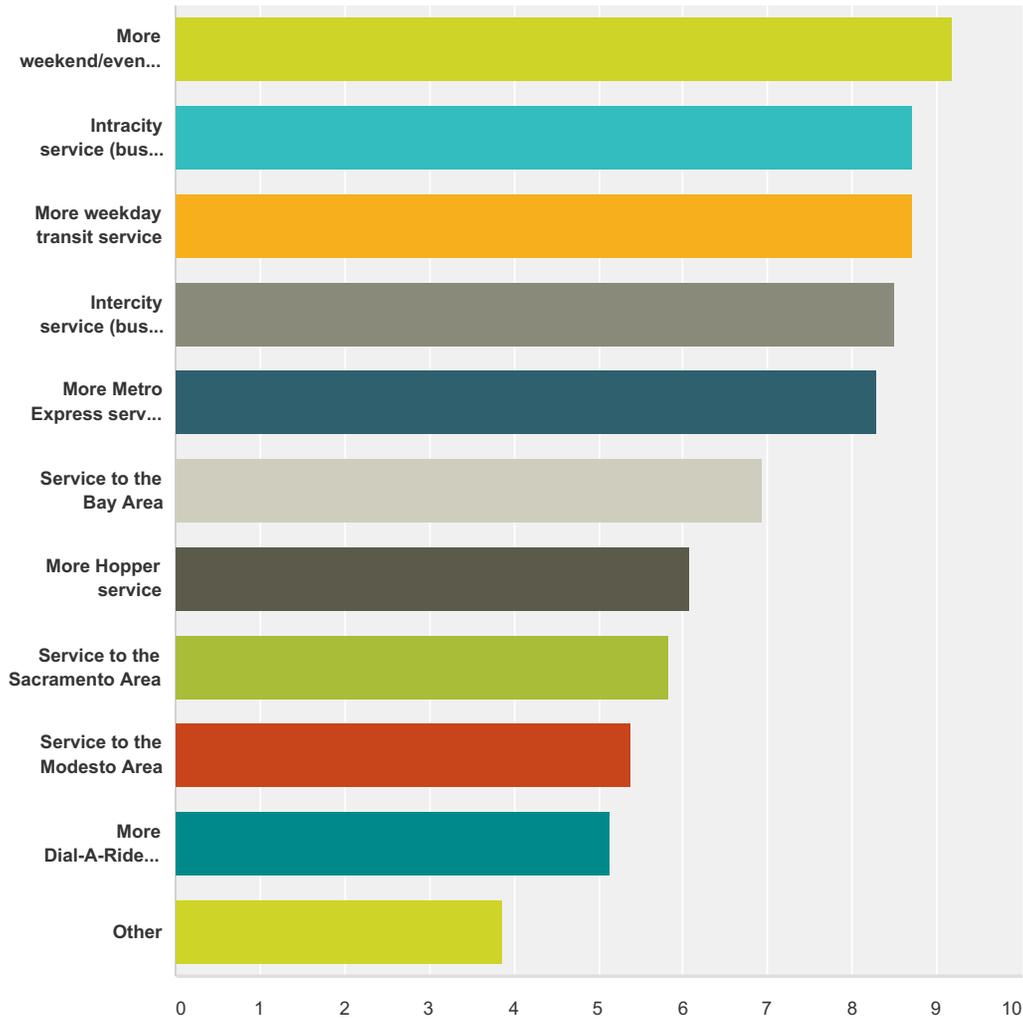
Answered: 370 Skipped: 53



	1	2	3	4	5	6	7	Total	Score
Work	63.86% 159	13.65% 34	4.82% 12	3.61% 9	5.22% 13	4.02% 10	4.82% 12	249	5.96
Shopping	13.24% 29	37.44% 82	27.40% 60	13.24% 29	5.94% 13	1.83% 4	0.91% 2	219	5.30
Medical Appointments	17.21% 37	28.37% 61	27.91% 60	11.63% 25	8.37% 18	3.26% 7	3.26% 7	215	5.12
School	38.15% 66	12.14% 21	7.51% 13	17.92% 31	6.94% 12	5.20% 9	12.14% 21	173	4.92
Recreation or Social Activities	7.11% 14	22.34% 44	17.77% 35	21.83% 43	24.87% 49	4.06% 8	2.03% 4	197	4.45
Religious Services	4.07% 5	5.69% 7	12.20% 15	7.32% 9	9.76% 12	42.28% 52	18.70% 23	123	2.85
Other	5.67% 8	8.51% 12	14.89% 21	10.64% 15	14.89% 21	9.93% 14	35.46% 50	141	3.08

**Q9 If funding was available for additional Bus Transit service for your community, what kind of service should be top priorities for investment? Please rank with #1 being your top priority, followed by #2, et cetera.**

Answered: 347 Skipped: 76

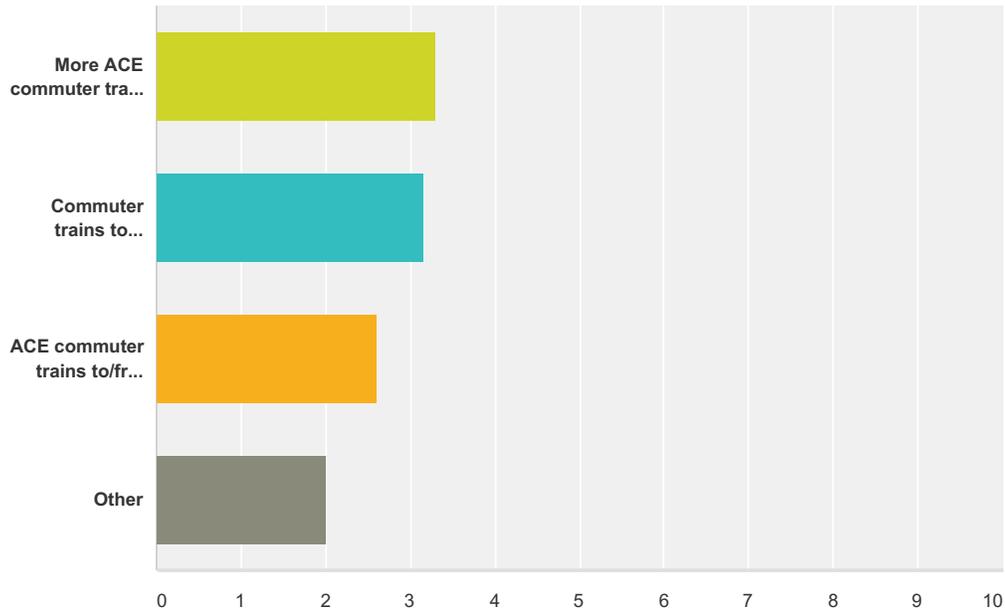


	1	2	3	4	5	6	7	8	9	10	11	Total	Score
More weekend/evening transit service	32.77% 77	25.53% 60	14.89% 35	8.09% 19	10.64% 25	1.28% 3	2.13% 5	1.28% 3	0.85% 2	0.43% 1	2.13% 5	235	9.18
Intracity service (bus travel within a single city)	26.29% 46	20.00% 35	18.29% 32	12.00% 21	6.29% 11	9.14% 16	1.14% 2	1.71% 3	1.71% 3	0.57% 1	2.86% 5	175	8.70
More weekday transit service	20.00% 37	25.41% 47	16.22% 30	13.51% 25	11.89% 22	4.86% 9	2.70% 5	2.70% 5	0.00% 0	2.16% 4	0.54% 1	185	8.70
Intercity service (bus travel between cities)													
More Metro Express service													
Service to the Bay Area													
More Hopper service													
Service to the Sacramento Area													
Service to the Modesto Area													
More Dial-A-Ride service													
Other													

Intercity service (bus travel from one city to another within San Joaquin County)	<b>23.13%</b> 37	<b>20.00%</b> 32	<b>10.63%</b> 17	<b>15.00%</b> 24	<b>12.50%</b> 20	<b>8.75%</b> 14	<b>5.00%</b> 8	<b>1.88%</b> 3	<b>0.63%</b> 1	<b>2.50%</b> 4	<b>0.00%</b> 0	160	8.49
More Metro Express service and routes in Stockton	<b>15.25%</b> 27	<b>20.90%</b> 37	<b>24.86%</b> 44	<b>11.30%</b> 20	<b>8.47%</b> 15	<b>4.52%</b> 8	<b>6.21%</b> 11	<b>2.26%</b> 4	<b>1.69%</b> 3	<b>1.69%</b> 3	<b>2.82%</b> 5	177	8.29
Service to the Bay Area	<b>23.81%</b> 45	<b>7.41%</b> 14	<b>10.58%</b> 20	<b>11.64%</b> 22	<b>4.23%</b> 8	<b>8.47%</b> 16	<b>4.23%</b> 8	<b>3.70%</b> 7	<b>5.82%</b> 11	<b>15.87%</b> 30	<b>4.23%</b> 8	189	6.94
More Hopper service	<b>3.73%</b> 5	<b>9.70%</b> 13	<b>7.46%</b> 10	<b>10.45%</b> 14	<b>8.21%</b> 11	<b>21.64%</b> 29	<b>11.19%</b> 15	<b>6.72%</b> 9	<b>10.45%</b> 14	<b>7.46%</b> 10	<b>2.99%</b> 4	134	6.08
Service to the Sacramento Area	<b>6.16%</b> 9	<b>8.90%</b> 13	<b>10.27%</b> 15	<b>7.53%</b> 11	<b>8.90%</b> 13	<b>6.16%</b> 9	<b>9.59%</b> 14	<b>10.96%</b> 16	<b>20.55%</b> 30	<b>8.22%</b> 12	<b>2.74%</b> 4	146	5.82
Service to the Modesto Area	<b>5.15%</b> 7	<b>2.94%</b> 4	<b>8.09%</b> 11	<b>7.35%</b> 10	<b>11.76%</b> 16	<b>6.62%</b> 9	<b>8.82%</b> 12	<b>27.21%</b> 37	<b>7.35%</b> 10	<b>8.82%</b> 12	<b>5.88%</b> 8	136	5.38
More Dial-A-Ride service	<b>8.06%</b> 10	<b>4.03%</b> 5	<b>6.45%</b> 8	<b>4.03%</b> 5	<b>4.03%</b> 5	<b>8.06%</b> 10	<b>20.16%</b> 25	<b>9.68%</b> 12	<b>13.71%</b> 17	<b>14.52%</b> 18	<b>7.26%</b> 9	124	5.13
Other	<b>14.14%</b> 14	<b>5.05%</b> 5	<b>1.01%</b> 1	<b>3.03%</b> 3	<b>2.02%</b> 2	<b>0.00%</b> 0	<b>7.07%</b> 7	<b>3.03%</b> 3	<b>6.06%</b> 6	<b>9.09%</b> 9	<b>49.49%</b> 49	99	3.87

**Q10 If funding was available for additional Rail Transit service for your community, what kind of service should be top priorities for investment? Please rank with #1 being your top priority, followed by #2, et cetera.**

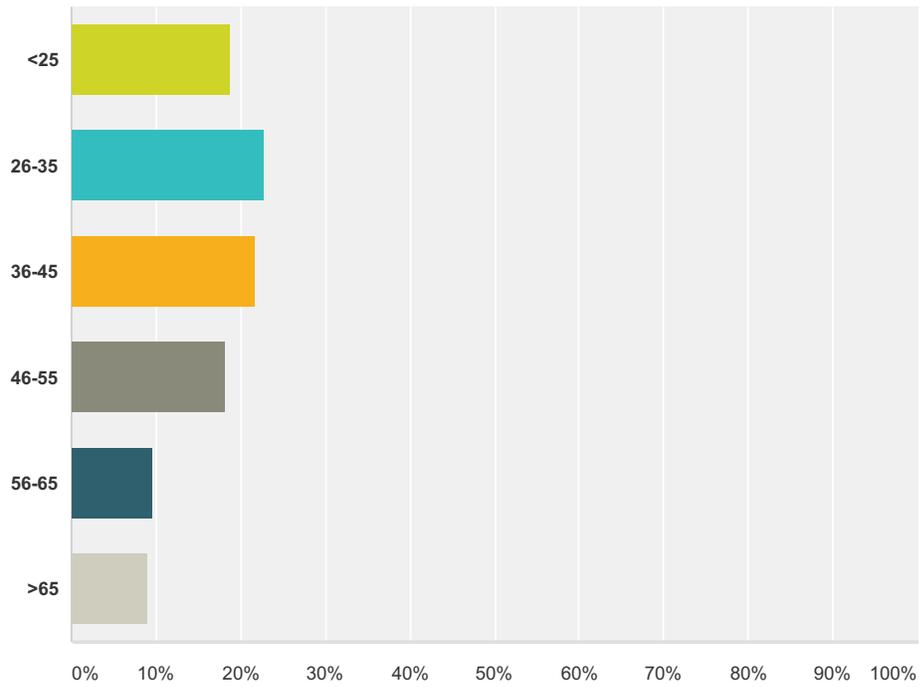
Answered: 302 Skipped: 121



	1	2	3	4	Total	Score
More ACE commuter trains to Bay Area, with possible service in Lathrop River Islands and Downtown Tracy	47.66% 112	36.17% 85	13.19% 31	2.98% 7	235	3.29
Commuter trains to Sacramento Area, with possible service in Downtown Lodi	42.93% 88	31.22% 64	23.41% 48	2.44% 5	205	3.15
ACE commuter trains to/from the Modesto Area, with possible service in Downtown Ripon and Downtown Manteca	22.00% 44	24.50% 49	46.50% 93	7.00% 14	200	2.62
Other	25.58% 33	10.08% 13	3.88% 5	60.47% 78	129	2.01

### Q11 How old are you? (Optional)

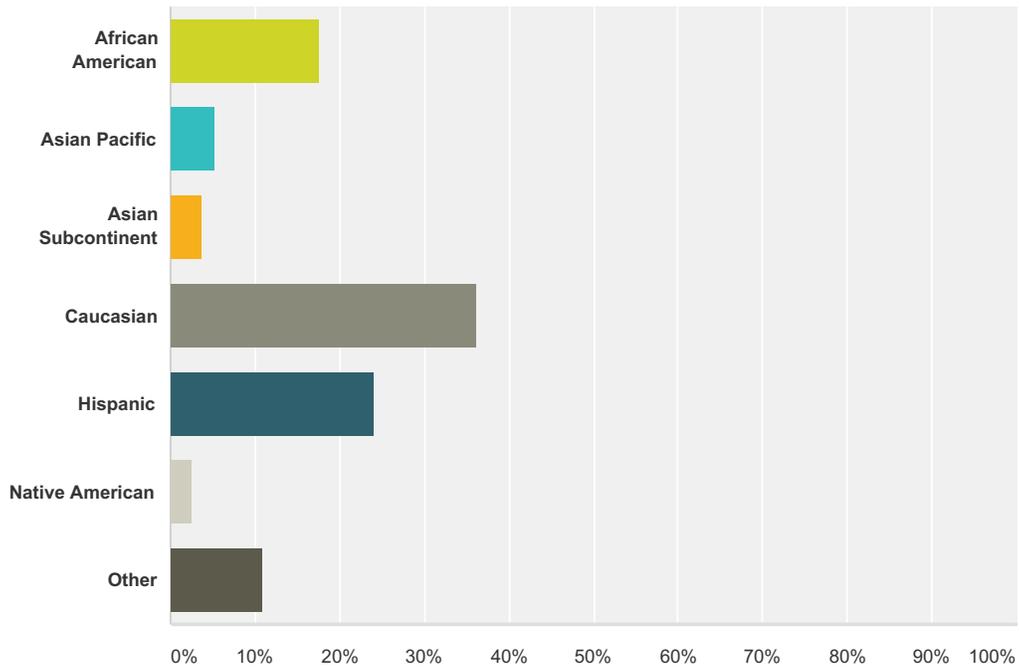
Answered: 346 Skipped: 77



Answer Choices	Responses
<25	18.79% 65
26-35	22.83% 79
36-45	21.68% 75
46-55	18.21% 63
56-65	9.54% 33
>65	8.96% 31
<b>Total</b>	<b>346</b>

### Q12 What ethnicity are you? (Optional)

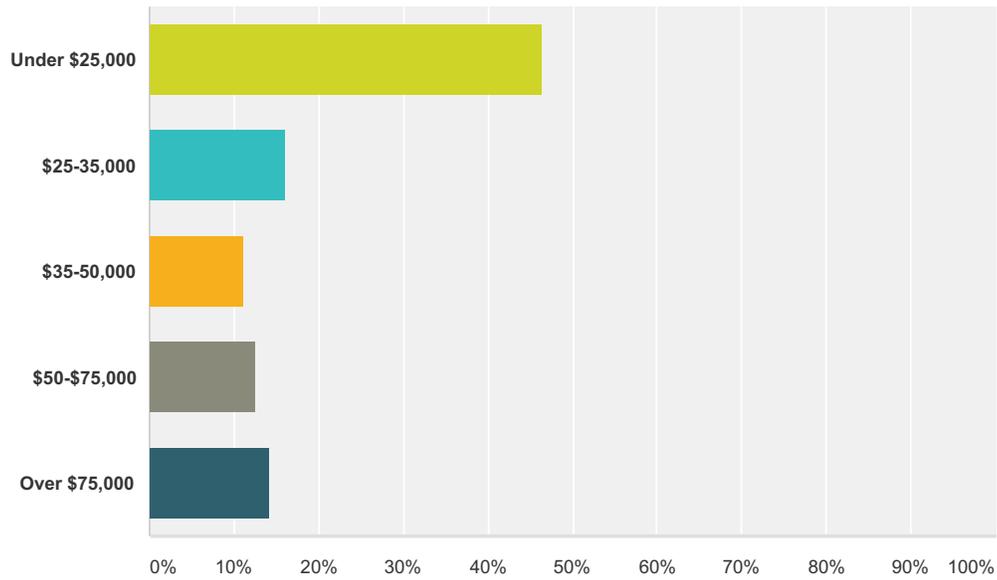
Answered: 321 Skipped: 102



Answer Choices	Responses	Count
African American	17.45%	56
Asian Pacific	5.30%	17
Asian Subcontinent	3.74%	12
Caucasian	36.14%	116
Hispanic	23.99%	77
Native American	2.49%	8
Other	10.90%	35
<b>Total</b>		<b>321</b>

### Q13 What is your annual income? (Optional)

Answered: 319 Skipped: 104



Answer Choices	Responses	Count
Under \$25,000	46.39%	148
\$25-35,000	15.99%	51
\$35-50,000	10.97%	35
\$50-\$75,000	12.54%	40
Over \$75,000	14.11%	45
<b>Total</b>		<b>319</b>

### Q14 Do you have any additional comments?

Answered: 210 Skipped: 213

#	Responses	Date
1	i would like to see express service back and forth on March Lane in Stockton CA	2/21/2016 3:27 PM
2	For the safety of the passengers on board, you need to consider replacing the commuter buses.	2/18/2016 7:01 AM
3	they are great drivers and great customer personal outside DTC.	2/17/2016 9:33 AM
4	[]-n/a	2/16/2016 8:08 PM
5	Weston ranch need more service. Lives on Henry long and working in retail tough to have no service on weekends.	2/14/2016 9:02 AM
6	Can we please get buses to give out day passes? Its so hard to ride the bus cuz I have to have exact change for the bus and cant buy a day pass until I get to a center. By that time I matter as well just keep paying per bus since the savings is already lost. Make the machines give out day passes when you put money in it. I thought it did that before, but it doesn't seem like it does that. If the buses could give out day passes instead, I would be able to use the bus so much more. Finding change in this day where most money is electronic is so hard, so it would be great if it could also take card payments, but if thats not an option, just being able to pay for day passes with 4\$ is a lot easier than finding change for 50cents, or something. Usually I leave change as tip or something at counters, but now I have to hoard my change and then use it up so fast. I don't spend enough cash to be able to keep change. I would love for buses to be my daily commute, better on the air and gas money, but instead its just forcing me to need to buy a car instead.. or ask people for a ride instead just because no one has change. Ridiculous!	2/13/2016 11:49 PM
7	No	2/12/2016 3:41 PM
8	Would like easier way to pay do not carry cash	2/11/2016 1:53 PM
9	More weekend services should be available, especially since many working class citizens depend on it.	2/10/2016 6:38 AM
10	YOU NEED MORE BUS SERVICES ON THE EVENINGS/WEEKENDS, PEOPLE CAN GET TO WORK OR TAKE CARE OF BUSINESS AROUND TOWN BECAUSE THE BUSES STOP OR AREN'T RUNNING AT ALL.	2/8/2016 3:31 PM
11	Personal experience. A week ago I was on my way to school, I was walking to the bus stop and I was 5 minutes early before the departure time of the bus and just when I was about to set a foot inside the bus, the driver closed the door in my face and left. I'm currently in college and because of that incident I got dropped by the teacher for missing class. Bus drivers should respect the schedule hours.	2/8/2016 12:47 AM
12	It would be great to have later busses or trains available after 7pm leaving Bart to Stockton.	2/7/2016 11:34 PM
13	Extend the route #66 weekends again and evening like before. If I can't get to work on weekends & holidays I'll lose my job!! Thank you	2/6/2016 2:41 AM
14	Shrink Government by 80%-90%, End The Federal Reserve and the IRS. Keynesian(Socialism)economics is killing this country. We need to go back to the Free Market and teach are kids U.S. Constitution in schools.	2/5/2016 4:17 PM
15	Having rapid buses that connects with early morning commuter buses and ace trains would make sense	2/5/2016 4:48 AM
16	More frequent bus service within Stockton; hourly on each route. More buses to BART at Pleasanton, hourly for preference. Better coordination with train times at Amtrak station, to allow passengers a convenient connection from train to bus, and vice-versa; or a shuttle service from the Amtrak station to the DTC, which connects with Amtrak trains.	2/4/2016 7:21 PM
17	Would like Commuter Bus to East Contra Costa County. Brentwood,Antioch,Pittsburg	2/4/2016 12:50 PM
18	Yes i catch the bus on the corner of don and meadow and it hasnt been working proper for about a year. Ive called sjrtd several times about how the buttons for debit/ credit card use are completed melted off and how it doesnt always take change and that it usually only takes dollars. This is very inconvenient as the machine soesnt dispense our change. No one seems to care at all about this particular machine on don and meadow..the women ive talked to over the phone about this have said that theyd pit some type of work order in but apparently its not a priority. Also just today i went to the other machine on hammer next to mc donalds and that one was out of order.	2/4/2016 7:46 AM
19	No	2/2/2016 3:41 PM
20	Buses should run every half-hour, since we have the express routes. Routes should run until 10:30 p.m.	2/2/2016 2:01 PM
21	BRT infrastructure (such as bus-only lanes and signal priority) for RTD Metro Express is needed. Safe parking lots are needed at the San Joaquin Street and Stockton train stations.	2/1/2016 4:57 PM

22	Please make the bus service longer than what it is now because the later we work the harder it is for us to get home. People with cars are not dependable so we need the bus.	2/1/2016 11:08 AM
23	I am a disabled person, but hate to drive in the long lines of traffic I love visiting, restaurants, shopping ocean sight seeing near Pier 39	2/1/2016 6:59 AM
24	I would like it if the buses would run on the weekends it's hard to find rides when your work weekends and the bus does not come by Monte Diablo on the weekends	1/31/2016 10:42 AM
25	I'd love to see the return of lower-priced transfer passes, instead of having to pay full price for a transfer. Or better yet, if a pass would be good for 90 minutes once activated, instead of just one ride on the same bus.	1/30/2016 11:45 AM
26	the 76 bus going to Bogs track, there should be more buses or there should be a bus that passes more hourly.	1/28/2016 12:18 PM
27	no, but thank you.	1/28/2016 12:05 PM
28	Bus 91 should go down to East Atherton Drive (Juniper Apartments) for the low income housing tenants who need to go to Stockton for school and work.	1/25/2016 8:17 AM
29	Most times when pulling up to the "triangle" only to see the bus you need leaving before you can get to it. If this could be fixed would be nice. (35 year bus passenger)	1/24/2016 4:52 PM
30	Getting from Ripon to Modesto Junior College is not possible at this time. I think there should be a route to connect each city within the YCCD College District.	1/23/2016 3:37 PM
31	I live in Conway and we only get 2 buses and the times they come out here are so spread out that you either miss an appointment or you're a couple hours early and we don't even get a steady bus for the weekend so it's like we are stuck out here for the whole weekend if we don't have a car. I spend too much money for my children and I to get back and forth to different appointments. Something has to be done. Just because people live out here doesn't mean that they should be stuck.	1/22/2016 9:59 AM
32	Everything is good with SJRTD. I'm grateful for the service, so thanks to everyone for a job well done.	1/22/2016 12:49 AM
33	I live on the corner of Kelly Dr I would like for the 365 to have more times in regards to the times of catching the buses in the mornings and more times in the afternoons and evening. I have two knee injuries on both of my knees, I don't like how I have to wait up until 3:55pm just to catch the bus and I definitely don't like catching the 43 and walking from W Hammer Ln and Kelley just to get home I'm in excruciating pain..	1/20/2016 12:11 AM
34	I travel to SJ Delta College from Tracy. More scheduled routes are needed to accommodate students. The schedules now are oriented toward the 8-to-5 workers. I know many students who would prefer taking the bus rather than driving, but there are too few schedule options available to make public transportation a timely alternative.	1/19/2016 6:49 PM
35	I would like to see a smaller fee for people over 65. I would also like to see a "helper" or the driver be able to assist people on and off the bus. I would like to be picked up as soon close to appointments as possible (so, no or late deliveries) Pick up from destination as soon possible.	1/17/2016 3:56 PM
36	Please bring back service to Mountain House. There are people who don't drive &/or are living in a one car household. That service was my lifeline. If this is really a viable living location, public transportation is needed. That's one of a list of "must haves" that made me move here.	1/15/2016 1:07 PM
37	I have to catch the bus to Lodi and then take Uber because no bus service is available to get me to my job. Buses should run later in the night as well.	1/14/2016 11:35 AM
38	Why do you keep changing the damn buses from Lodi to Stockton. Set the damn schedules and leave them alone and you wonder why people get pissed at RTD for not running every hour run them like you first did every hour and stop making big time gaps for a 1 p.m. appt I have to leave at either 9 a or 10 just to have to wait and then rush to get the bus home and that one is just as messed up. Stop messing up the buses	1/14/2016 7:38 AM
39	I need a bus round trip from Weston Ranch to the County Hospital and back to Weston Ranch	1/8/2016 9:27 PM
40	How about fast service on E. and W. March Lane Stockton?	1/8/2016 10:33 AM
41	No.	1/8/2016 9:41 AM
42	ACE should have funding from Alameda County to extend their platforms in Alameda County to those of San Joaquin and Santa Clara Counties. Opening one-half of one door on the last three cars doesn't cut it!	1/6/2016 1:50 PM
43	I wish for metro buses passes were checked more often because all I see are people who don't buy passes jump on the bus and get rowdy and cuss constantly on buses. They jump off before the check point locations downtown and the triangle so there is no way to get caught.	1/6/2016 11:10 AM
44	I ride the 93...66 almost everyday. It would be nice also on weekends.	1/6/2016 8:24 AM

45	I'm very enthusiastic about public transit, especially rail, but as a freelancer, typical commuter-oriented services are of limited use. Weekend, daytime, and reverse-commute services would be great for people like me who have nonstandard schedules, both for business and leisure travel.	1/4/2016 9:19 PM
46	poor service for seniors and the bus drivers need to learn how to handle the cussing and the young people taking up senior disabled seats sometimes we have to stand.	1/4/2016 11:59 AM
47	I have called and I have left a message. It takes at least 3 days or more for a phone call back. The email address bounces back. The 888-802-9675 number that is listed on the website is a constant busy tone when you call it. You need better ways for busy people to be able to contact the people that work at Regional Transit	1/4/2016 9:54 AM
48	We need hopper bus in don ave stockton straight to kaiser clinic	1/3/2016 9:08 PM
49	Lower monthly bus passes.	1/2/2016 8:04 PM
50	A weekend service to Trinity Parkway is desperately needed.	1/2/2016 7:37 PM
51	Have more buses be available to the public and to have more buses come during the afternoons for the public	12/30/2015 9:03 PM
52	Need more evening service	12/29/2015 3:29 PM
53	Living in Weston ranch working in mall always buses are running late. And Henry long has only bus every hour.	12/29/2015 6:48 AM
54	The services now available do not run enough or late enough for good service coverage. And you took routes that ran from one end of tow to the other and broke them into 3 pieces so it's not convenient to get from north to south Stockton.	12/28/2015 8:12 PM
55	Rail funds should be used to build proper platforms in Alameda County. Current procedures lock out three of seven cars causing inconvenience in embarking and disembarking. When BART expands to Livermore, the ACE train should link up and be adjacent to BART platform, thereby eliminating shuttle service to BART station.	12/28/2015 9:06 AM
56	if the Stockton community can have trains that will take people to San Francisco, Sacramento, Turlock, Modesto more faster and cheaper. We can clean our environment a bit by not driving everyday in separate cars.	12/27/2015 4:08 PM
57	Who qualifies for the Transit Ambassador position?	12/24/2015 3:09 PM
58	the 43 going down hamerlane need to run untill 9 pm i get out of school at 8pm and be stunk at the triangle station	12/23/2015 4:08 PM
59	Clean the bus more often	12/22/2015 7:28 PM
60	They really need to make the 52 route buses bigger or turn one of the metro buses into the 52 route because the buses for the bus 52 are too narrow and cant fit alot of people on the bus 52 like the different disabled adult programs like mine which is open door services.we used the bus 52 route alot to get down town and to the county hospital every Monday.they also need to put a hopper at the westlane bus stop too,in case the bus 52 is late showing up to the bus stop.	12/21/2015 7:43 AM
61	I have had a difficult time getting to San Joaquin County courthouse for Jury Duty. I have had to reschedule several time for transportation	12/18/2015 2:32 PM
62	Please do not discontinue Rural Connection Route 554 to Tracy-Delta College Mountain House Campus. Community members rely upon this route and more awareness would increase the ridership. Cab fair from my home to the campus one-way is \$25 w/o the tip. Not very economical. The drivers are friendly and knowledgeable. Please do not discontinue this service. Thank you ;->	12/16/2015 2:48 PM
63	Riding the bus is not as bad when the drivers are nice.	12/15/2015 3:25 PM
64	no I don't have any additional comments	12/15/2015 11:28 AM
65	There needs to be more buses from Stockton to Manteca than every 2 to 2 and a half hours. It's really irritating when I miss 1 bus by a couple of minutes then have to wait any where from an hour and a half to 2 and a half hours to be able to go where I need to	12/15/2015 8:47 AM
66	Personally I would love to see schedules run longer on weekends, though I realize there's probably not much budget for that. Another thing I would love to see is some kind of route to Turlock since a lot of students in Stockton go to CSU Stanislaus. (That is the "other" I was thinking about in questions 7 and 8.)	12/14/2015 3:01 PM
67	I would also like to see a park and ride lot in mountain house near 205 & Mountain House Parkway, as well as 580 & Mountain House Parkway. Those two locations would help carpools a lot!	12/8/2015 4:32 PM
68	I think the bus drivers should be more patient and courteous with riders. I know there are riders that don't deserve it, but that doesn't mean you have to be rude to all the riders. Some of your drivers should not be working with the public.	12/6/2015 6:21 PM
69	Now unable to drive, disability	12/6/2015 12:28 PM

70	I am thankful for the transit buses, but some routes are not thought out well. I think some buses need another bus less than a hour instead of waiting an hour for next bus cause of the capacity of people that take certain routes. I think also that some drivers are nice and some are rude. Drivers are late and a lot of people depend on the bus for work, school and etc.	12/6/2015 12:18 PM
71	The drivers are not asking people to shut off music or keep the noise down lately.and some of the driver's are extremely rude	12/2/2015 3:23 PM
72	Buses are always late and drivers are very rude	12/1/2015 10:18 AM
73	A departure point from the north Stockton area would be a huge plus... Trinity Parkway or March Lane/BenHolt at I-5	11/28/2015 10:16 PM
74	no	11/28/2015 12:20 PM
75	why the bus does not match ACE Train schedule. I take the last train home then I have to run from the ACE Station to DTR to take a 44 bus to Pacific then walk 15 minute home. It dark, It crazy and scary lot of crazy man. Please help thank you	11/26/2015 8:39 PM
76	Please Do Not Discontinue the Mountain House Bus. I am a single mother and i have no car. That is my transportation.	11/26/2015 11:20 AM
77	THEY SHOULD REALLY TRY TO HAVE AT LEAST A FEW BUSES RUNNING DURING HOLIDAYS. TRE SHOULD NEVER BE A TIME WITH NO BUSES RUNNING EVEN IF ITS ONLY 3 THE WHOE DAY.	11/26/2015 11:18 AM
78	Add more bus stops for Hopper 4 between March Lane and Stratford Circle (USPS) on the North-Bound route.	11/24/2015 3:51 PM
79	There needs to be buses to provide transportation to the Juvenile Justice Center. The current availability is Bus 52 which currently does not transportation during the visiting hours for youth detained in San Joaquin County Juvenile Justice center. The bus does not run on the weekend either. Our children are our future we need to invest. Im just a mom I have 2 boys locked up and I just want to be able to love them no matter what, part of that is being there when bad choices are made.	11/24/2015 4:36 AM
80	Weekend service almost non-existent. Why so many Hoppers and less RTD buses. The buses not maintained as well, little Hoppers are noisy,uncomfortable and there's frequently new drivers who don't seem to care. City Planning did a Transportation Forum in August 2014 and people said they need bus service, but RTD service is terrible from what it used to be. Hoppers use rude contract drivers who care little for public and disabled. Otherwise I'd ride everyday.	11/23/2015 12:55 PM
81	Improve connections to Bart Improve connections from Linden CA	11/17/2015 12:03 PM
82	Many people would use a train route from Stocton through downtown Tracy over the Dumbarton train bridge into Redwood City ether connecting to Caltrain or going into San Francisco, for work, events, or shopping. Hwy 580 gets more crowded every day. Alternatively, a single BART track to Dublin from i.e.Tracy would alleviate much 580 traffic even with 1 train an hour.	11/16/2015 8:11 PM
83	More rail service to the Bay Area. Automotive traffic is too heavy and one reason is the lack of a reliable alternative. Consistent and reliable rail will take cars off the road. Please link ACE Train with other Bay Area public transportation networks (like BART). To get to Oakland/SF is too cumbersome and requires too many lengthy transfers. Simplifying this will get people out of their cars.	11/16/2015 3:45 PM
84	We really need service to and from Linden. I am disabled and lack any kind of transportation from Home to Costco to get Prescriptions and Sutter Gould for Dr. Appts.	11/16/2015 10:13 AM
85	Sometimes I'm told certain features on the coaches don't work, heater, phones to dispatch, air. More maintenance is desired. Cleaner coaches, flu season is approaching sometimes the first coach out in the am already has trash and most coaches have filthy windows. The service is wonderful overall, thank you and good luck. By the way a lot of drivers could benefit from customer service and diversity classes, role play even.	11/13/2015 10:53 PM
86	If funding was available and a measure was passed, extending BART in San Joaquin County would be an honest investment. Many people drive or take Route 150 to BART. by funding an extension from the Dublin/Pleasanton line, this would reducing traffic conditions and bring better connections.	11/12/2015 6:46 PM
87	Weekdays are difficult because of an hour and a half or more between buses. Weekends are impossible with no buses. Many of us don't live on the 40 or 43 route.	11/11/2015 5:01 PM
88	Need to add more device to route 60	11/10/2015 8:35 PM
89	Some people don't feel safe while writing city bus. Would like to have an express down March lane	11/6/2015 2:13 PM
90	No	11/4/2015 11:53 AM
91	Please spend any additional money on making sure that the existing services actually run on time as it takes me and, I am sure, many of my fellow riders longer than necessary to reach destinations because events with in the drivers's control cause the service to miss connections such as leaving on time, waiting to board persons not waiting at stop on time, etc.	11/4/2015 7:02 AM

92	More times and bigger bus for manteca	11/2/2015 4:59 AM
93	Stop letting people curse	10/30/2015 10:23 AM
94	Every time a change is made the service gets worse! I had to move to another part of town just so I could have bus service throughout the day! I lived on route 65 that later was changed to 365. Mid day I had to walk 2 miles to get to bus 43 to go to work! That is ridiculous! Now I have service within 3 blocks of my new home (routes 5, 23, 51 and 52) but still need to get to work on weekends! I am a Merchandiser and my job requires me to travel all over Stockton and Lodi. Also the gap at midday in the 23 route and the 93 runs from DTC to Lodi BUT it needs to stop along EIDorado at the same stops that 23 does (example: EIDorado and Noble) instead of going all the way past Alpine for its first stop in the area!	10/29/2015 10:43 AM
95	AVG WAIT TIME FOR A BUS IS AN HOUR. BUSES THAT SERVICE THE METRO AREA STOP AROUND 5 PM. SOME SERVICE STOPS SHORTLY AFTER 5 PM FROM DTC - SOMETIMES THE BUS IS EARLY/LATE AND UNABLE TO CONNECT TO OTHER SERVICE OR CATCH LAST BUS. ENDED MOST/ALL SERVICE ON THE WEEKENDS MAKING IT VERY DIFFICULT TO GET AROUND DUE TO THE WEATHER. NO RESIDENTIAL SERVICE AFTER 5 PM. MAYBE EVERYONE THAT WORKS FOR/AT RTD SHOULD RIDE THE BUS TO/FROM WORK, SCHOOL, SHOPPING , ETC. TO ACTUALLY UNDERSTAND HOW DIFFICULT IT IS. SOMETIMES THERE ARE OTHER REASONS FOR SOMEONE NOT BEING ABLE TO DRIVE, SUCH AS HEALTH ISSUES. PLEASE MAKE PUBLIC TRANSPORTATION AVAILABLE AGAIN.	10/28/2015 12:46 PM
96	We need the 710 to go all the way around like the 55 during the weekend so more people can come out	10/22/2015 9:26 PM
97	you need to reinstate weekend service. you need to reinstate shuttle service to ACE train. This is the only city that doesn't provide shuttle service. you need to have less service that goes to Eight Mile Road	10/22/2015 2:53 PM
98	We need busses between Stockton and Lodi later in the evening.	10/22/2015 9:44 AM
99	Interested in bus to San Francisco	10/22/2015 9:07 AM
100	At all bus stop should be a voice alert so we the people rides the bus knows if the bus going to be late or not,because i hate being late meaning im a very impatient person	10/19/2015 8:03 PM
101	Sometimes, it's uncomfortable riding the busses because of bad odor and dirty seats. Clean seats should be a priority. Matbe RTD should change the seat types from cloth to a material that can be cleaned with wipes.	10/19/2015 5:07 PM
102	I actually love the sjrtd bus. It a great way to get around, the ride are pleasant, and he drivers all bave vreat character!	10/17/2015 6:56 AM
103	It is extremely important that all drivers, new or not, know where to depart and return to. And that if buses are delayed, that transfer connections wait. On Friday 10/2/15 I had to go and watch a movie (Everest) at the downtown Stockton Theatre to wait/avoid the heat due to the 40 Express being delayed 3 minutes. Missed my connecting bus to Tracy(#97) by 2 minutes. Had already waited for Express # 40 from 12:25-12:53 pm for a coach picked up passengers at the Ben Holt and Pacific stop( one passed us by~12:40pm). I had budgeted enough time to shop at Safeway and return home. Then, on 12/5/15, the driver of the #97 bus, departed from Channel Street instead of Weber Ave and left 12+ passengers stranded for 2+ hours. DTC personnel said that his coach phone was not working, so he could not be contacted to return to pick us up at the correct boarding point. It was very hot, crowded and uncomfortable at the DTC as we waited patiently. Coming to Stockton from Tracy for a 10:00 am appointment and returning home turned out to be and all day trip. The replacement Hopper, which arrived at 2:25 pm, with no air conditioning and no function ticket box, nearly broke down on the highway and the driver had the good sense to return to the DTC and report the situation. We were then re-boarded onto the returning #97 at ~ 2:50pm and returned to the Downtown Tracy Transit Center. One passenger called a Cab, as he was going to be late for his first day of work, others had medical appointments and other issues to address. One senior passenger did contact DTC and spoke to a women named Roberta who informed him of a transit meeting today 10/16/15 that was open to the public. She listened and was sympathetic as he recounted what the entire passenger experience had been for the last 2+ hours. However the situation was still Unacceptable. Also, the BART Express to Pleasanton needs to run until at least 8 pm returning to Stockton. After 6:35 pm, the only option is to take the Amtrak through way bus with a paid connection to Modesto. And that's if you call ahead and get a reservation #. Have been stranded in the Bay Area before, stayed with relatives overnight and did not return home until late afternoon. Unacceptable and so very inconvenient. ACE needs to run at least until 8 pm from Pleasanton as well towards Stockton. Same issue as above. Thanks for listening and asking for this survey. Here's to better transit futures :->	10/16/2015 10:06 AM
104	Regular rail service to Bay Area on Amtrak (more trains than at present). AND much better timed bus connections at the Amtrak station in Stockton. More ACE trains with midday departures and returns.	10/14/2015 10:13 PM
105	I had trouble with some of the questions	10/12/2015 11:43 PM
106	Bus service needs to run later for those of us that need service after 5:00 p.m.	10/11/2015 1:05 PM
107	Is there bus service on Monday October the 12th, 2015 in Stockton, California?	10/11/2015 11:56 AM

108	Bus service is worst then what it use to be. I've been passed up by hoppers and I've been late to work to where I have to get ride to work. It's a shame how the buses run now. The drivers who drives main line have truly helped me and your drivers needs to know how great they are. Those drivers needs a raise. Can you please fix the bus system to run better during day and weekends. I can't work weekends due to the way buses run.	10/10/2015 5:17 PM
109	can you or will you return the AM to Lodi on Bus 23 back to 8:30 AM? 2: express service on E. and W. March Lane would be super.	10/10/2015 4:47 PM
110	N/a	10/7/2015 7:52 PM
111	Please update the times for some buses. There's a twonhour layover for some buses and there would be no other means of transportation to get to work /school. Especially during peak hours of the day. And for weekend buses times to start earlier please. Thank you.	10/7/2015 9:03 AM
112	Bus services should run longer.	10/3/2015 2:08 PM
113	It would be nice to see more polite drivers in Stockton too. If another passenger got them upset it should be taken out on everyone else because their having a bad day.	10/2/2015 3:02 PM
114	Need to have some additional busses running between Stockton and Lodi #23 has large chunks of time it is not running and that can be very difficult with children and schedules	10/1/2015 8:53 AM
115	i would take the ace train , but i can not because the livermore bus arrives the same time ace train leaves the transit station	9/30/2015 9:48 PM
116	I would like to suggest that Route 55 run it's route at least until 7pm, weekdays. It's my only form of transportation to and from work and it brings me closer to my home after work. I would like to avoid walking home from the DTC after dark.	9/30/2015 4:11 PM
117	Route 97 going pass Lathrop library at Lathrop Generation Center during library open hours. Also I would think the high school students need public bus services to their school and activities at the Lathrop Generation Center.	9/30/2015 1:19 PM
118	We really need more buses on the weekends	9/30/2015 7:41 AM
119	1. Contract with Wheels Bus for a free bus transfer. 2. Update busses so that the correct bus route is displayed on the front and the side of the bus. Learn from Modesto Max bus, which looks light years ahead. 3. Wi-fi on board - would be nice to have.	9/28/2015 10:35 AM
120	Run more frequently to the Bay Area and Sacramento. Regardless of which mode at least every 1-2 hrs	9/28/2015 8:40 AM
121	Truly wish weekend service was available for route 71. It's a shame they took it out. People have lives. We like to go places on weekends too, especially if we don't have a car. I use 71 for work. I have to shell out so much money to get to work other ways on weekends or even weekdays bcuz times got cut	9/28/2015 1:33 AM
122	Live on henry long stockton no bus service on Sunday. Need help. Retail job dont have weekends off.	9/26/2015 7:18 AM
123	No	9/24/2015 3:30 PM
124	Is very good	9/24/2015 8:21 AM
125	I like riding the bus	9/23/2015 7:56 PM
126	I'm very upset. I just got an electric wheelchair cuz of my health. Have a DMV placard under my name cuz doctor signed forms to certify disability. Now I'm trying to get dial a ride service to get to work & have to jump thru more hoops to prove disability. I'm already going thru enough pain & emotional difficulties trying to keep "living" & now have to fill out more proof, try to get my doctor to fill out her part in a timely manner and wait 21 days to see if I can even get service!!! This is a horrible experience for anyone who is already traumatized by their disability!	9/23/2015 3:09 PM
127	No	9/22/2015 11:20 PM
128	Bus service stinks. Need 63 on weekends Pershing and Venetian area. Get rid of the old hopper buses for seniors with walkers, mobile devices. +++improve everything.	9/22/2015 10:10 PM
129	Bring BART to Tracy	9/22/2015 9:44 AM
130	I REALLY, REALLY, REALLY! want the bus number 61 weekend service which is number 745 to go to my weekday bus stop on Davinchi and Grand Canal north bound so I can go to church on Sunday's (Quail Lakes Baptist Church) without having to walk a mile to Rosemarie and McGaw St. to get there!!!! Please make this change!!!! Thank You!	9/22/2015 1:24 AM
131	The routes are confusing as far as in times. Some bus service runs 30mins on the dot while others are only between certain hours and only go so far.	9/21/2015 11:32 PM
132	RTD commuter to Bart from Tracy is too limited. It should extend one more bus in the afternoon for returns. There are lots of Bay Area Commuters riding on BART cannot catch the 6:30 bus. I believe either open one more bus or extend the 6:30pm bus to 7pm.	9/21/2015 4:18 PM

133	Buses 40, 43, and 44 are usually filthy inside from the passengers. If there was a way to keep it cleaner, it would be a much more pleasant bus ride. Often times there is tobacco, p in the seats, and peoples random trash. For the ethnicity option, I chose other because White was not one of the options. Caucasian is not white.	9/18/2015 10:25 AM
134	More transit options available during nights and weekends would be ideal.	9/18/2015 6:33 AM
135	Will Regional transit offer out of county transportation for medically fragile children?	9/15/2015 4:16 PM
136	Having a bus come into Lodi every 30 minutes from Stockton would be so much better for a student like me.	9/14/2015 9:20 PM
137	Current service on Route 90 is terrible. Drivers are often late and sometimes don't even show up. The schedule is oriented to working commuters and doesn't even consider Delta College and UoP students whose class schedules vary from those of working commuters. Additional weekday buses with hourly departures would probably attract greater student ridership. Do some surveys at Delta campuses.	9/14/2015 8:51 PM
138	My grandson takes the Hopper from Tracy to and fro. Twice the bus NEVER shows up to bring them home. Today the 6:50 has not come. It went by them a 7:30 and here it is 7:59 and these students still sit and wait. They pay for your service and get this . Something needs to be done to correct errors SOON.	9/14/2015 8:01 PM
139	It would be helpful to have a connection from Mountain House or nearby area (maybe Mountain House Parkway exit).	9/13/2015 4:05 PM
140	It gets annoying when I get to the metro bus stop on time, only for the bus to be 10 mins late. Which in return makes me miss my bus to my doctors appointment. Also being 36 weeks pregnant, doesn't help the fact either. I would appreciate it if you had bus drivers that were on time instead of worrying about talking to the homeless people at the bus stop(s).	9/13/2015 12:49 PM
141	It would be nice to have a few later running buses after 5:35 all ng 77 line. Thank you. Ms P. College ns 510.776.0707	9/13/2015 12:28 PM
142	I think public transportation is very important in the city of Stockton and we wouldn't be able to be independent without it. Thank you	9/13/2015 8:39 AM
143	I have to take the 66 to trinity parkway in stockton for work due to a recent car loss. I'm finding it very difficult to rely on the rtd route because it does not run in that area at all on weekends and has very limited hours of operation during the week. Because of the limited hours for the route, I can mostly take the bus to work and have to find a ride for after work. Very disappointing.	9/12/2015 11:21 PM
144	your website trip planner does not work. Need a bus that goes N to S or E to W on major streets, no diversions.; Need daily service on March Lane east to west to east - no diversions. List of all bus stops for each route available on web site. Have shade (or rain cover) benches for all stops. Copy of bus schedule of each route at each marked stop. Put air freshener trees on each bus, besides the filth, the smell is unbearable. Provide a park spot on bus where passenger can park their cart to allow free aisles and open seating. Small children must be accompanied and monitored and driver can ask for compliance on noise and gone wild behavior and non compliance will allow driver to eject passenger with option of issue of temp pass or app to file for fare refund.	9/11/2015 11:16 AM
145	Need to be in San Francisco by 7am Monday - Friday...unable to use ACE train and RTD commuter because no 4am service to get to BART by 5:30am. So I have to drive. Need more earlier morning service from Tracy to Pleasanton..	9/10/2015 6:42 PM
146	Public transport should be must for I eligible people who can t drive or can t spent on pvt car etc	9/10/2015 4:55 PM
147	d	9/10/2015 9:05 AM
148	I wish the transportation was up to standard like the transit systems in the bay area,and because it's not,it makes it very difficult to thrive in this area...Although,the cost of living is cheaper than some areas,it defeats the purpose of living here if u can't get to work to support yourself or your family...Not everyone drives a vehicle,and for those that do drive,it can be a hardship because of the commute,and if the car breaks down,you're stuck with no way to travel due to the poor transit systems in San Joaquin County/Central Valley...	9/9/2015 3:13 PM
149	Request for a service from Mountain House to Dublin Bart - weekdays around 6.30 a.m.	9/9/2015 1:12 PM
150	Bus 91 arriving/departing from Delta College to and from Manteca/Tracy at least every two hours.	9/9/2015 8:56 AM
151	Cheaper monthly passes.	9/8/2015 10:46 PM
152	ACE Train service to Sacramento would is much needed.	9/8/2015 4:43 PM
153	The hardship of no transportation here in Stockton and its neighboring areas has paralyzed me since I don't own a vehicle.	9/8/2015 12:03 PM
154	I would like to see 10 ride bus passes back	9/7/2015 6:22 AM
155	I wish there was a bus traveling from Pacific Ave. to Wilson Way via Harding Way.	9/6/2015 2:17 PM

156	I think it would be nice to have more frequent service of the San Joaquin bus to other cities as frequent as a bus of a single route arriving to that city once per hour or more frequent than that if possible. I think other routes should be made or extended to cities nearby because not every city is connected and there are students in those cities who attend college or university in Stockton. Therefore, I think there should be bus service to Galt, San Andreas, cities nearby San Andreas in the mountain route 4, Angels Camp, Farmington, Escalon, Oakdale, Salida, Modesto, Elk Grove, Byron, Brentwood, Oakley, Antioch, and other cities which are very close to Antioch all the way to the DTC of San Joaquin RTD. These will help maximize access to Stockton for those who attend college or university in Stockton, and having a bus go to those cities at least once an hour for every new route will give those students the fair access to go to Stockton and go home whenever they need to and will allow them to choose classes with less restrictions which is important to their progress and success as they move on with their studies and will help them to move on faster and get more help needed in their classes as to what is available. That would be great, but again, only if financially possible to create those new routes.	9/5/2015 10:26 AM
157	p[s help with extending times for busses, some of us depend on RTD. for everything ,its hard to stay home without transportation thank you :))	9/4/2015 11:26 AM
158	It would be nice to have a system in place that has a more efficient/effective timetable	9/2/2015 6:41 PM
159	It would be nice for RTD machines to give back any change, so we dont have to carry exact change.	9/2/2015 5:38 PM
160	Have updated in real time app that track where the bus is on its route many times I have had to wait for the bus to come when it an hour late	9/2/2015 11:08 AM
161	not at this time.	9/2/2015 11:04 AM
162	I am a disabled adult with a child who travels to school from east side of Stockton to country club for school I have a car but it's in shop n I have to take him by bus I haven't ridden bus in over 20+ years n don't know what number bus to use to get him there on time RTD should have better information on how to use buses n get there on time	9/1/2015 9:43 PM
163	Service to gilroy from central valley	9/1/2015 6:44 PM
164	Make express buses less congested. Too many people try to get on the bus free and so often do. There has got to be a more efficient way to weed out the non-payers of bus fare. Express buses are a great idea but I am highly disappointed in the people using it to get a free ride. I am certain one would see a less congested express bus if only honest people were the ones left riding these buses. I truly dislike taking the express bus most times for these very reasons.	9/1/2015 4:46 PM
165	An improvement in providing public transit in SJC would be to offer weekend ACE and/or RTD service to BART.	8/30/2015 8:12 PM
166	The ace Train should Run from Lodi to San Jose. The Morada Area need a fixed bus rout to service those who live north of morada LN	8/29/2015 1:07 PM
167	I really would love to have the entire city of Stockton having service on the weekends like it use to. There's areas that doesn't have service at all on the weekends. And this shouldn't be.	8/28/2015 10:49 PM
168	We need more routes to feather drive n deer creak	8/28/2015 5:55 PM
169	Lower down bus ride fees	8/28/2015 7:30 AM
170	Yes I would like see more later bus schedule for 43 to go Walmart on Hammer lane because you stop bus service at 6pm at night and later route 40 run late night. I weekends you stop route 43 at 6pm from Don and hammer and stop route 40 at 6 40pm so now I ride uber and lift because you don't have buses soon I might have start driving because buses are not here for workers.	8/27/2015 8:18 AM
171	You should make people pay on the Metro, and stop the music playing on the metro.	8/27/2015 7:58 AM
172	Regional agencies need to work together. It is clear that each agency is working in silo and without really coordinating fastest/most efficient service for commuters. Study European bus services and any large city (San Francisco) - you'll learn a lot.	8/26/2015 10:33 PM
173	Bus 152 should be direct service from stockton to livermore. If not, select stops for pickup next to freeway. It takes 1 hour 25 minutes to Livermore east gate. I might as will drive to work.	8/26/2015 6:50 AM
174	No.	8/25/2015 6:15 PM
175	There should be conversation initiated for light rail transit between Stockton-Tracy-Manteca-Lodi.	8/25/2015 10:12 AM
176	Stockton needs more buses that run late people work late an graveyard. Also all nighters buses is needed. I'm willing to volunteer an drive	8/25/2015 9:56 AM
177	Good people, and as helpful as they can be-under the circumstances. KUDOS! to whoever came up with the "Grandma sez" posters, about idiots wearin' knee-high pants. Put your friggen pants on, or no ride! SHOULD SELL T-SHIRTS @ RTD with that picture! You could earn a bunch for rtd & programs...or I might!?!)	8/24/2015 5:00 PM

178	Thank you for considering expanding the ACE train system to include the valley!!!! Wonderful idea and now for the fulfillment	8/24/2015 3:26 PM
179	More bus stops in Ripon would be nice. And some of the bus stops aren't actual bus stops, why?	8/22/2015 4:50 PM
180	I would like to see more service to eight street in stockton especially on weekend because if i want to do anything i have to wait until ten o clock to catch a 715 then still transfer two more times just to get to the mall this means that half my day is gone and due to having to take the three buses back so i can get home my day is a waste so if i need to go out on weekend i spend an hour and a half to walk from my home down town so i can catch the firts bus 40 @8am, i know many people in my area do the same	8/22/2015 7:38 AM
181	Service between Manteca to Tracy, connected by their transit stations.	8/20/2015 1:44 PM
182	We need a stronger transit system period. Now a days if cities and regions want to compete in today's global economy they need a good multimedia system in combination with an increase in density at the city's core. The question is do we as a city, as a county, as a region want to do that and compete? Also is how much and and how far do we need to go to strike a balance between generating enough tax revenue to sustain the cities and not going too far in displacement. We are a civil society don't let whats happening in the Bay Area happen here.	8/19/2015 9:33 PM
183	Bus service needs to be expanded during weekday and weekend evenings. Average citizens who work retail jobs occasionally get off of work around 10pm and then are forced to walk home because there is not any service. After all, this IS Stockton and its not the safest place to be walking at night. Payment machines located at the Metro Express stops need to maintained to a higher standard. Staffing needs to be increased so that when there IS an issue with a machine it gets fixed in a timely manner.	8/19/2015 5:02 PM
184	Your schedule doesn't reflect actual service...i.e. the county hopper 97 service stopped before 5p.m. but the brochure said last pick-up was 5:30p.m.	8/19/2015 10:19 AM
185	If funding was available for this, I would also suggest a BART extension into San Joaquin County to go as far as North Stockton	8/19/2015 9:27 AM
186	Improve routes to Sacramento with buses that have air conditioning and reliable service. Don't change drivers each week, don't be late every day and don't make excuses.	8/19/2015 9:12 AM
187	Yes, SJCOG we need a legitimate public transit here in Stockton and San Joaquin county. To many reductions in service in this community it looks like you guys don't know what your doing you guys take the easy way out ever time and that's cutting funding for services lets try this how about putting your college degree to work an help build a soild transit system that's well funded by a variety of funding One big help is advertising your services to the public, and also get advertising on these buses this will offset some of your operating cost. Stop being lazy SJCOG lets earn our paychecks for the rest of 2015 into 2016 and beyond lets make our transit system a model that the rest of world will recognize as the best.	8/18/2015 9:41 PM
188	more service within Stockton area	8/14/2015 1:47 PM
189	Is there any plan to provide regular Manteca bus transit to the southwest area of town ( Airport and Woodward, etc)? If so, when?	8/13/2015 8:02 PM
190	A bus link from Mossdale neighborhoods to Lathrop ACE station would reduce number of cars on the road in the mornings. Short drives with the engine cold emit the most pollution and cause the most wear and tear on cars.	8/12/2015 5:29 PM
191	Please put ACE train station in River Islands, Lathrop.	8/10/2015 10:55 PM
192	Please no ACE station at River Islands. It sets a bad precedent that all new developments deserve an ACE station.	8/5/2015 5:45 AM
193	Ensure safe and secure riding experience, reasonable fares, and convenient schedules, and you will have more riders.	8/4/2015 10:03 PM
194	It's a shame how buses in Stockton runs. Who ever in charge should be a shame of them self. For two weeks the CEO should ride the bus to and from work to see what we the public goes through from day to day. RTD use to care about passengers now leaving people struck. Hoppers driver was very rude and it takes to long to get where I need to go.	8/3/2015 5:22 PM
195	Add more weekend service as well	8/3/2015 1:16 PM

196	I am not too familiar with the transit system here, but I have some experience taking it as a teenager. Also, I would like to take it now to work, but it would take two buses and 1.5 hours to get to work, and I only work 4-5 miles away from where I live. Biking isn't safe either even though that is reasonable distance to bike on some days. Having a bus would be nice as I can't always bike for different reasons. I live in the Riverbend area (by Cesar Chavez high school) and work on Pacific Avenue (Delta College area) where there is lots of activity and traffic. If you haven't already, you need to work with major employers and businesses that get lots of traffic from people to figure out where people are coming out to plan more efficient and productive routes. Also, working with social service providers is important as planning for transit dependent people is important. A lot of change can happen with even simple yet innovative solutions (e.g. thinking outside the 9-5 schedule but running on a schedule like 8am-12pm and 2pm-7pm or some thing else. Buses shouldn't have to run for 8 hours straight). Perhaps working on route modifications and sliding scale fares would increase ridership/improve transportation options. If you all want to increase the population here, you should improve transportation/mobility options (also reducing the number of cars on the road). Having express buses to certain areas during certain times might be helpful as well. We also need to teach people of all ages to ride the bus, bike, and/or be multi-modal. Along with driver's ed, there should be days where students take the bus. Travel training would also help increase transit use. In addition, planners need to stop planning low density, auto-centric communities. We need better connectivity in this county. The cost of sprawl is way too high not just now but especially in the future.	8/3/2015 9:13 AM
197	The survey should allow for a 0 or n/a for a neutral response. I did not fully rank every category because I did not believe that those services would benefit me or my family. I left those blank and hope that a blank response counts equally as a "zero" value. We need more commuter bus and rail services as jobs sadly continue to decline within our County.	7/31/2015 11:29 AM
198	Convenience v. cost is the calculation we all make...	7/30/2015 9:55 AM
199	Not only should it be cheaper than driving, It's time to find the funds to be paying people to utilize mass transit. Or at least rebate them somehow.	7/29/2015 3:37 PM
200	Have more programs for Seniors that are on limited income.	7/28/2015 12:51 PM
201	Would love to see BART extended into Livermore and toward Tracy.	7/28/2015 9:29 AM
202	Please add Express ACE train service. Stockton sorely needs a direct line from the Stockton train station directly to Pleasanton. Bay Area ridership is soaring, and Stockton and area residents need a way to get from Stockton to the Bay Area in a short time period. RTD transit should also have expanded Express bus lines from Dublin to Stockton. At the very least, RTD and ACE should have one line, each day, in each direction, that runs from BART to Stockton without stops. Thank you for your consideration.	7/27/2015 1:05 PM
203	ACE needs better connection to BART. Also better Amtrak to Sacramento/Bay Area	7/27/2015 12:07 PM
204	give all monies to San Joaquin RTD. they are best suited and qualified to run the entire transit for the County and all smaller cities such as Lodi, Manteca, Lathrop, and Tracy..	7/27/2015 9:54 AM
205	Need more frequent servive on Stockton fixed routes, route 43 and 44 and the new route 49 and 47 should run a lot later in the evening. The route 365 should go back to route 65 and run a normal schedule as plan stop all the bullshit put the service back to the 2007 level we pay high enough taxes, why are we being cheated out of servlce.	7/26/2015 1:56 AM
206	With regards to San Joaquin Regional Transit, please operate Route(s) 23 & 93 on hourly headways, everyday. This will help with connectivity improvements to/from County of Sacramento South County Transit Links that would take passengers along the Lodi - Galt - Cosumnes River College Route. Officially effective September 6, 2015, Cosumnes River College Sacramento Regional Transit District Light Rail Station opens to the public. Light Rail Trains will operate everyday, and not take a day off.	7/25/2015 8:15 PM
207	We need much better service to the Bay Area. More frequent trains and a service direct to BART	7/25/2015 11:28 AM
208	Please get better AMTRAK service! Get rid of San Joaquin Street Station, consolidate to Cabral. Need non stop RTD commuter buses from Stockton to BART in the morning. For ACE, need ACE-specific shuttle from Pleasanton stop to BART, it's too time consuming to take Wheels.	7/25/2015 9:46 AM
209	More trips for Route 365 Please	7/24/2015 6:37 PM
210	I would like to see more frequent service extending into evening for all existing routes within Stockton.	7/24/2015 10:24 AM

*Appendix B – Federal Funding Programs for Transit*

<i>MAP-21 Program Name</i>	<i>Permitted Uses</i>	<i>Allocation Method</i>
<b>FTA Section 5307 Urbanized Area</b>	Capital projects, preventative maintenance and planning activities. For areas with less than 200,000 in population, operations expenses are also an eligible program expense.	Funds are distributed annually to urbanized areas (UZAs) using a formula based on population, population density, and transit revenue miles of service. <sup>1</sup>
<b>FTA Section 5310 Enhanced Mobility for Seniors and Individuals with Disabilities</b>	Capital and operating costs of providing services to the elderly and disabled.	Funds allocated by formula to states and large urbanized areas. A portion of the state-wide funding amount is awarded to operators through a competitive program.
<b>FTA Section 5311 Rural Program</b>	Capital and operating expenses for rural and small urban public transportation systems	Awarded to Counties based on their share of total non-urbanized population. Counties distribute further to rural transit providers.

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<sup>1</sup>UZAs in San Joaquin County include: Lodi, Manteca-Ripon, Stockton, and Tracy. Of these, all UZAs are less than 200,000 in population except Stockton.

<i>MAP-21 Program Name</i>	<i>Permitted Uses</i>	<i>Allocation Method</i>
<b>FTA Section 5337 State of Good Repair</b>	Capital assistance for replacement and rehabilitation projects of existing fixed guideway systems to maintain a state of good repair. In San Joaquin County, SJRRC is currently the only eligible recipient.	Funds are allocated directly to rail and BRT operators using a formula that incorporates some elements from the former Fixed Guideway Rail Modernization Program, as well as factors based on revenue miles and route miles.
<b>FTA Section 5339 Bus and Bus Facilities</b>	Capital expenses including funding to replace, rehabilitate, and purchase buses and related equipment as well as construct bus-related facilities vehicles, stops & stations, and maintenance equipment.	Based on proportional share of urbanized population. UZAs in San Joaquin County include: Lodi, Manteca-Ripon, Stockton, and Tracy.
<b>Congestion Mitigation and Air Quality Program (CMAQ)</b>	Capital & operating expenses for projects that help reduce traffic congestion and improve air quality in non-attainment areas. Examples include: signal coordination, ridesharing, bus service expansion.	Funding is allocated to counties for discretionary awards to sub-recipients, consistent with local needs.

*Appendix C –State Funding Sources for Transit*

<i>Funding Source</i>	<i>Permitted Uses</i>	<i>Allocation Method</i>
<b><i>Proposition 1B:</i></b> <b>Public Transportation Modernization, Improvement, and Service Enhancement Account (PTMISEA)</b>	Rehabilitation, safety or modernization improvements, capital service enhancements or expansions, new capital projects, bus rapid transit improvements, or for rolling stock procurement, rehabilitation or replacement.	Program funds are split: <ul style="list-style-type: none"> <li>• 50% allocated to Local Operators using formula in PUC Section 99314</li> <li>• 50% to Regional Entities using formula in PUC Section 99313.</li> </ul>
<b><i>Proposition 1B:</i></b> <b>Transit System Safety, Security, and Disaster Response Account (TSSSDRA)</b>	Capital projects that provide increased protection against a security and safety threat, and for capital expenditures to increase the capacity of transit operators, including waterborne transit operators, to develop disaster response transportation systems that move people, goods, and emergency personnel and equipment in the aftermath of a disaster impairing the mobility of goods, people, and equipment.	Directly allocated by the Legislature from one of three component programs: <ul style="list-style-type: none"> <li>• Mass Transit Program (60% of funds)</li> <li>• Waterborne Program (25% of funds)</li> <li>• Heavy Rail Program (15% of funds)</li> </ul>

<i>Funding Source</i>	<i>Permitted Uses</i>	<i>Allocation Method</i>
<b>State Transit Assistance (STA)</b>	Transportation planning and mass transportation purposes, including both capital and operating expenses.	Annual state appropriation in two categories: <ul style="list-style-type: none"> <li>• PUC 99313 funds are distributed proportionally based on relative share of transit ridership.</li> <li>• PUC 99314 funds are distributed proportionally based on relative share of fare revenues.</li> </ul>
<b>Greenhouse Gas Reduction Fund: Low Carbon Transit Operations Program (LCTOP)</b>	New or expanded bus or rail services, and expansion of intermodal transit facilities; may include equipment acquisition, fueling, maintenance and other costs to operate those services or facilities, with each project reducing greenhouse gas emissions. For agencies whose service area includes disadvantaged communities, at least 50 percent of the total moneys received shall be expended on projects that will benefit disadvantaged communities.	Continuous appropriate using same formula as STA (above): <ul style="list-style-type: none"> <li>• PUC 99313 funds are distributed proportionally based on relative share of transit ridership.</li> <li>• PUC 99314 funds are distributed proportionally based on relative share of fare revenues.</li> </ul>

## **APPENDIX D: PUBLIC FEEDBACK ON DRAFT PLAN**

### **SJCOG Interagency Committee Review of “Administrative Draft”**

Prior to the release of the complete draft, an “administrative draft” was made available for review to the San Joaquin Council of Governments Interagency Transit Committee. As stated earlier, these members include City of Escalon, San Joaquin Regional Transit District, City of Tracy, City of Lodi, San Joaquin Regional Rail Commission, and City of Manteca. The purpose was for this committee, who had been working on various chapters and technical content for the plan for over a year, to do final review and make any needed revisions before public release. Additionally, SJCOG encouraged transit agencies to review and update information that was included in Chapter B in order to ensure accuracy. As a result, staff received the most up-to-date data from transit agencies to include in the Draft Plan.

Specifically, SJCOG staff worked with individual committee members on requested edits, produced redlined versions of technical changes for final review as requested. In one instance, City of Manteca requested some modifications for the City of Manteca’s operator vignette (and related infographics) on June 30, 2016 when the draft plan had already been posted and available for public review. SJCOG, however, incorporated all those technical edits in the November 2016 Final Draft of the RTSP. City of Manteca transit staff was provided changes of the final draft and approved those changes for accuracy, prior to incorporating them in the November Final Draft.

### **Development of Public Outreach Strategy**

At the May SJCOG Board meeting, members requested staff hold public workshops for gathering public input and for discussion on key issues addressed by the RTSP. At the June Board meeting, staff notified Board that workshops would be scheduled in July to go over the plan in more detail. For further information, please refer to staff reports in Attachment 1.

The public draft was released on July 1, 2016 for a 30-day public review period. In addition to circulating the public draft through SJCOG committees and inviting written comments, SJCOG gathered feedback from a wide range of interested parties through public outreach efforts that include:

- Two (2) Public Workshops;
- Three (3) Board Workshops; and
- One (1) Stakeholder Meeting.

Below is a summary of the public feedback received throughout this process.

### **Public Workshops**

As requested, SJCOG staff held two public workshops in the month of July to gather public input on the Draft Plan. View the workshop flyer in Attachment 2.

Date	Time	Topic	Attendance	Location
July 14	10am – 11:30am	General Overview of RTSP	~15 (local groups, RTD, member agencies)	SJCOG Board Room
July 20	6pm – 7:30pm	General Overview of RTSP	<5 (local groups, CAC members)	SJCOG Board Room

### Summary of July 14

At the first workshop, SJCOG staff designed the agenda to be interactive with participants. A round of introductions revealed that participants attended for a variety of reasons that include:

- To learn about the RTSP;
- To serve clients who use transit;
- To re-grow transit service;
- To learn about the future funding outlook of transit in the region;
- To work collaboratively to serve transit riders;
- To help make the plan better; and
- To help define and acknowledge problems.

Staff also invited participants to share their own regional transit visions, which are listed below:

- Improved service frequency in outlying areas;
- Better connectivity with other regional and interregional transit systems, or simply a better way to get between counties;
- Reducing barriers for making the switch to transit—transit as a viable choice for everyone.

Staff provided a general overview of the RTSP, breaking down each section of the plan. The participants were then split up to delve into deeper discussions on aspects of the Action Areas that are a focus of Chapter D. From the break out groups, there was particularly high interest in Action Area #6: Funding Policy Changes/Grant Process. Another smaller group focused on Action Area #5: Supportive Land Use Policies/Practices.

At the conclusion of the workshop, participants were encouraged to review the plan and provide written comment by the August 1 deadline.

### Summary of July 20

Similar to the first public workshop, staff provided a general overview of the RTSP, breaking down each section of the plan. Because the group was small, staff facilitated a group discussion on the Action Areas featured in Chapter D, however the questions and comments that came up were off topic and did not pertain directly to the Draft Plan.

### SJCOG Board Workshops

Following the public workshops, a series of three board workshops were held to dive deeper into key issues addressed by the Draft Plan. All workshops were open to the public. View flyers in Attachment 3.

Date	Time	Topic	Attendance	Location
July 27	7:30am – 9:00 am	Transit Service Coordination	~20 (SJCOG Board members, RTD staff,	SJCOG Board Room

			member agencies, members of the public)	
August 10	7:30am – 9:00 am	Regional Rail & Bus Transit Service	~20 (SJCOG Board members, RTD staff, member agencies, members of the public)	SJCOG Board Room
August 24	7:30am – 9:00 am	Innovations in Transit	~20 (SJCOG Board members, RTD staff, member agencies, members of the public)	SJCOG Board Room

**Summary of July 27**

The first board workshop of the series was focused on the topic of transit service coordination, as a potential strategy to streamline redundancies in operations among transit operators in the region and to ultimately reduce costs.

Some key concerns shared by participants include:

- Skepticism that transit will efficiently and effectively serve the growth projected for the region, both in the movement of goods and people;
- Representatives from the City of Lodi shared their interest in seeing improved regional infrastructure for bicycles and the potential for introducing light rail to the region;

Guest speaker Phil McGuire of Innovative Paradigms gave a presentation that highlighted a case study of effective transit service coordination in Contra Costa County. Examples from this presentation helped to jump start discussion among the participants who attended. Some of the ideas for possible coordination that came up among participants included:

- Purchasing fuel in bulk,
- Sharing maintenance facilities,
- Bus procurement,
- Coordination of contracts,
- Centralized bus dispatching.

**Summary of August 10**

The second board workshop of the series was focused on the topic of regional rail and bus transit service. Guest speakers Donna DeMartino, CEO of SJRTD and Dan Leavitt, Manager of Regional Initiatives of SJRRC/ACE were invited to speak on the future of regional bus and rail transit in San Joaquin county.

Donna DeMartino highlighted San Joaquin RTD and the various services it provides throughout San Joaquin County, as well as a breakdown of monetary costs of service provided in member jurisdictions throughout the region. Donna DeMartino concluded her presentation with a list of potential areas where San Joaquin RTD could further provide value and expertise to the region. Following the presentation, there was discussion on coordination and cost savings opportunities. Board members were interested in developing economies of scale and figuring out how new efficiencies could open up

service in underserved areas like Lathrop. There was also discussion of commuter van pools and smaller buses as potential opportunities to increase efficiencies in operation.

Dan Leavitt gave a presentation highlighting ACE plans for expansion of service in the next 10 years. Due to a constraint in funding, Dan Leavitt presented a scaled back program which included adding a 5<sup>th</sup> and 6<sup>th</sup> daily round trip, station and platform improvements, and fleet expansion. Dan Leavitt also discussed financing challenges faced by ACE and the current landscape for addressing these challenges. At the conclusion of the presentation, Dan Leavitt discussed BART connectivity as long-range goal for ACE. Board members asked questions about expected ridership growth with an ACE-BART hard connection and expressed concerns about ensuring parking at station areas, as well as facilities for enabling riders to take transit, walk, or bike to their stations.

At the conclusion of this workshop, a member of the board expressed that they did not have the right information from the RTSP process due to difficulty finding connection between the ongoing transit funding issue and the Draft Plan in its current state. There was also concern about the impact transit service coordination would have on local control, as well as the continued question on how to better provide transit service in rural areas.

#### **Summary of August 24**

At the third board workshop, the discussion focused on innovations in transit to explore new technologies and alternative solutions for moving people in the region, both in urban and rural communities. Representatives from the UC Davis Institute of Transportation Studies, Lyft, and Government Technology were invited to speak.

At the time of the workshop, a pilot program for new technology-driven mobility services was in its initial phase of development with UC Davis Institute of Transportation Studies. Guest speaker Caroline Rodier focused on the concept of shared mobility as a solution to meeting rural transit needs in the San Joaquin Valley, including enabling technologies, ride sharing, ride sourcing, ride splitting, microtransit, car and bike sharing. The pilot project aims to look at these options to solve rural transit needs for accessing transit, employment centers, and for addressing specific needs of seniors and disabled residents. During a brief discussion following Caroline's presentation, a member of the board shared its concern over the accessibility of these shared mobility options given that seniors may be unfamiliar with services like Uber and Lyft and are more likely to rely on traditional dispatchers for transit service.

Laura Biseto from Lyft presented on transit and the future of mobility. Laura discussed the idea of density of demand and the need for flexible choices (e.g. vehicle size) to effectively meet needs. During her presentation, Laura demonstrated how a partnership with Denver Regional Transit District is providing subsidized line rides to or from light rail during commute hours. Laura also mentioned a partnership with transit dispatchers for arranging Lyft rides for customers. Following Laura's presentation, participants raised the issue of density and whether or not rural areas or even some of the urban/suburban areas of the county have the level of density to achieve adequate service provision from ride sourcing services like Uber or Lyft. There was also high interest among participants regarding vanpools.

Ben Miller from Government Technology highlighted three trends in transportation: automation, connection, and electrification. Ben offered some innovative ideas emerging in transportation that capitalize on these major trends, such as:

- System linking, for coordinating arrival/departure times, transit signal priority, and optimal speeds to avoid red lights;
- Integration applications that offer single ticket payment, provide non-transit options (rideshare, bike share, walking), kiosks to help connect the unconnected;
- Using better data to track vehicles, spot problems and find easy transit solutions;
- Develop first/last mile solutions that include rideshare, multi-modal options, self-driving shuttles or on-demand shuttles; and
- Electrification to upgrade buses, trains, shuttles, vans.

At the conclusion of his presentation, Ben discussed key connections for pursuing innovative transit solutions that include the encouragement of TOD/infill/compact development, switching to electric vehicles, partnerships for pursuing grant funds, better intergovernmental collaboration, partnerships with private entities that can promote the use of transit, as well as volunteering to test transit technology in the region which requires no funding at all. The group discussion revisited the challenge of density. There is uncertainty how readily residents will adopt alternative mobility options.

### **Stakeholder Meeting**

Additionally, staff presented the Draft RTSP to a group of local and regional stakeholders. At their monthly coalition meeting on August 26, El Concilio invited SJCOG staff to present the Draft RTSP. The meeting was held in Manteca and included a diverse audience of about 20 coalition members and service providers in the San Joaquin region. Meeting attendees represented organizations that included school districts, youth serving agencies, legal aid services, as well as health and social services. Staff fielded questions that were unrelated to the RTSP, such questions about projects currently under construction and the transit planning process that determines the location of stops and frequency of service. Although the review period had ended, staff invited those in attendance to send in their comments.

### **Comments Received During the 30-day Public Comment Period**

The complete draft document of the Regional Transit Systems Plan was made available for public review, with a 30-day comment period from July 1 and August 1, 2016.

### **Comments Received Between July 1 and August 1, 2016**

- **July 15, 2016** – SJCOG staff met with Stacey Mortensen and SJRRC/ACE staff on the draft document. Ms. Mortensen asked SJCOG to work with Dan Leavitt and Brian Schmidt for some technical corrections to the funding and cost figures identified in the Altamont Commuter Express (ACE) operator vignettes and related infographics based upon that information. SJCOG staff worked with RRC staff in making the needed corrections and all those corrections have been reviewed by RRC staff prior to inclusion in the November Final Draft of the RTSP.

- Other than comments described in the other parts of the public outreach strategy (i.e. workshops, committees), there were no other formal comments on the draft Plan received by August 1, 2016.
- One e-mail was received after the public comment period, and described below:

**August 2, 2016** – Michael Selling, Deputy Public Works Director for San Joaquin County. A copy of the letter (follows this section) and SJCOG staff responses provided below.

**Response to Comment A:** It is noted that these are general observations by the commenter on the Plan.

**Response to Comment B:** Many of the questions were the reason behind the development of Chapter D: Courses of Action in the Plan. Subsequent to the July Draft, an additional Chapter E: Next Steps Following the Comments on the Plan outlines a recommended strategy for further analysis to delve into these questions through an Ad Hoc Committee.

**Response to Comment C:** It is noted that the commenter is expressing questions related to a concern for route duplication and whether transit services can be “purged”. In the Board Workshop #3, RTD described how the agency performs transit route planning to meet operating efficiencies and cost-effectiveness. RTD routinely examines routes for performance to avoid duplication of services or low ridership. RTD routinely conducts on-board surveys as part of the empirical research behind route planning.

**Response to Comment D:** These figures are derived from the National Transit Database. The figures are “rounded” and this explains why simple math of the rounded figures will not add up.

**Response to Comment E:** The possible cost-effectiveness of Uber and Lyft services has been brought up during the public workshops on the RTSP. It is identified as an area needing more attention in RTSP Chapter D, Action Area #5E. So, the commenter is not alone with this observation. For this reason, a Lyft representative was invited to discuss Lyft existing service and addressed questions at Board Workshop #3. Currently, Uber and Lyft services have a limited service in San Joaquin County due to the distance of travel between urbanized areas and lack of drivers to meet demand response times in unincorporated areas. Neither company currently operate as a “transit system” because neither provide set schedules for pick up and drop off. Neither company operates a demand response system like Dial-a-Ride in San Joaquin County.

**Response to Comment F:** The comment is correct that individuals in San Joaquin County may fit in more than one socio-economic area (disability, under the poverty line, age). The statistics presented are intended to describe the persons in San Joaquin who are in one of these socioeconomic measures, recognizing that some persons may be in more than one.

**Response to Comment G:** Regarding Page #A2-4 references, the numbers on work force and commuting presented in both paragraphs are correct – however, they are derived from different data sets. The numbers presented in paragraph 1 were obtained from a University of the Pacific Center for Business and Policy Research and are based on data obtained from the 2005-2010 American Community Survey. The data in the second paragraph were obtained from the Longitudinal Employment Household

Dynamics (LEHD). While the LEHD is also a Census product, it is a combination of state and federal unemployment insurance data and the Quarterly Census of Employment and Wages. The American Community Survey data is derived from the annual long-form census questionnaire sent to individuals. The LEHD data tends to show a larger number of workers in total and more workers that live and work in the same county, thus the percentage of reported out-commuters is smaller.

Regarding Page #A4-1, the statement “By 2040 the vehicles miles traveled by individual drivers (VMT per capita) will increase 70 percent if San Joaquin County does not improve regional transportation mobility options” was not correct. The sentence has been removed from the paragraph. Also revisions were made to the following sentences on this page.

Roadway widening improvements cannot be the only solution to increasing travel demand in a region with a population as diverse as its need for transportation options and accessibility.

Such a transit system must be safe, reliable, accessible, convenient, cost-effective and sustainable.

Implementation of such a public transit system, in addition, must closely take into account neighborhood livability, environmental and open space preservation, sustainability, and cost-effectiveness for all routes and services.

**Response to Comment H:** Comment noted. The need for performance metrics and continuous re-examination of ways to bring down transit costs are described in Chapter D: Courses of Action (specifically, Action Area #2b and #2f). Also, the reference to alternative transportation modes commonly includes bike/pedestrian travel.

**Response to Comment I:** The Interagency Transit Committee, formed in 2004. The ITC agenda items are primarily focused on transit systems, transit funding, and transit planning. Possibly, it may have been that over the years, City of Stockton and San Joaquin County reduced attendance because RTD attended ITC and provides transit services in those areas. All cities and the County of San Joaquin are welcome to attend every meeting and representation by agencies to ITC is an option exercised by the respective city/county agency. SJCOG posts agendas on the web site, distributes agendas via e-mail per committee member request, and also has a teleconference line for those who want cannot attend in person.

**Response to Comment J:** Noted.

**Response to Comment K:** The graph shown on this page shows the weighted average and not the “score” identified in survey data. The way to read the graph is as follows—the weighted average closest to “1” reflects the higher the priority. Therefore, the weekend /evening service with a value of 2.82 is the highest priority followed by intracity service and weekday transit service. The narrative did not correctly describe the chart so this has been fixed in the November Final Draft of the RTSP.

**Response to Comment L:** Noted. The need to re-examine service efficiencies is outlined in Chapter D. Courses of Action and Chapter E: Next Steps.

**Response to Comment M:** Noted.

**Response to Comment N:** This chapter describes the funding that is eligible to transit. It also references Appendix B which describes the funds in more detail, where there is a reference to roadway projects (traffic signals) and other non-transit air quality beneficial projects eligible for CMAQ. For clarity, a footnote was added to the table denoting roadway improvement projects are equally qualified for CMAQ funding.

**Response to Comment O:** Additional wording added to Action Area #2b per suggestion.

**Response to Comment P:** Additional wording added to Action Area #6c, per suggestion.

**ATTACHMENT 1: STAFF REPORTS**

May 2016  
SJCOG Board

## STAFF REPORT

**SUBJECT:** Regional Transit Systems Plan

**RECOMMENDED ACTION:** Discussion

### DISCUSSION:

### SUMMARY:

The San Joaquin Council of Governments has prepared the administrative draft for ITC review of the Regional Transit Systems Plan.

SJCOG is looking for comments on or before June 3<sup>rd</sup> in order to prepare a June draft for public review.

SJCOG will brief the Board on some key observations from the administrative draft and describe next steps.

### RECOMMENDATION:

Discussion/information

### NEXT STEPS

1. Circulate Public Draft Document – June
2. Make revisions based upon public comments - July
3. SJCOG Board approves final report - August

*Prepared by: Diane Nguyen, Deputy Director*

June 2016  
SJCOG Board

## STAFF REPORT

**SUBJECT:** Regional Transit Systems Plan Update

**RECOMMENDED ACTION:** Information

### DISCUSSION:

### SUMMARY:

On May 18, 2016, the San Joaquin Council of Governments prepared an administrative draft for Interagency Transit Committee review of the Regional Transit Systems Plan. Comments were received from the ITC and, at the time of this mailing, the draft was undergoing revisions to respond and incorporate comments.

It is anticipated that the public draft will be released in late June through a web link directly to the plan. Stakeholders and interested parties will be notified of its availability and comment period.

A Board workshop will be planned for July to go over the plan in more detail.

### RECOMMENDATION:

Information

### NEXT STEPS

1. Circulate Public Draft Document – late June 2016
2. Comment Period Open for Draft Plan – June through July 2016
3. Preparation of Final Draft in response to Comments Received – August 2016
4. SJCOG Board approves final report – September 2016

*Prepared by: Diane Nguyen, Deputy Director*

September 2016  
Board

# STAFF REPORT

**SUBJECT:** Developing Recommendations for the  
Regional Transit Systems Plan

**RECOMMENDED ACTION:** Discussion

## DISCUSSION:

### SUMMARY:

The Regional Transit Systems Plan (Systems Plan) is the long-range transit plan that looks at bus and rail transit needs, their related costs, and details a financial forecast of anticipated funding through year 2024. The Plan outlines a regional transit vision and six “action areas” that define various strategies and calls for a collaborative process with transit operators, the general public, and city/county governments to develop solutions.

With the close of the 30-day public review of the plan and completing five public workshops, SJCOG staff received extensive feedback from the public, stakeholders, and SJCOG Board members. Some comments remarked on the readability of the plan in conveying technical information effectively as well as presenting a lot of helpful information about the transit operators. A consistent comment, in addition, was that the Plan lacked meaningful recommendations to immediately tackle tough policy decisions and therefore no solutions could be pursued to address the funding challenges.

This staff report summarizes key themes and policy areas discussed through the public outreach process and offers more detail on potential recommendations to be incorporated within the Systems Plan. SJCOG staff is looking for feedback and refinement on these policies in September before bringing back a final draft of the Systems Plan later this fall.

### RECOMMENDATION:

Discussion and input on transit policy to build recommendations within the Regional Transit Systems Plan.

### FISCAL IMPACT:

None at this time. Any policy development that results in funding policy will ultimately have a direct fiscal impacts on the allocation and expenditure of state, federal, and local funds in the San Joaquin region.

## BACKGROUND

Public transportation is important to the efficiency and effectiveness of the San Joaquin region's transportation system. It is a crucial factor in opportunity and economic prosperity which are contributors to overall quality of life.

The San Joaquin region provides public transportation, via bus and rail transit, that serves both local and regional transit needs. This is made possible by the local transit operators in the cities of Tracy, Manteca, Ripon, Lodi, and Escalon and by the regional transit operators, San Joaquin Regional Transit District (bus transit) and San Joaquin Regional Rail Commission (rail transit). Through short trips within the County or longer trips to neighboring counties, transit connects residents to jobs, schooling, shopping, medical visits, and other key destinations.



The San Joaquin Council of Governments has prepared the Draft Regional Transit Systems Plan that describes a future of public transit needs, costs, and financial resources through 2024. It identifies considerations, issues, policy development, and implementation areas that must be examined further, thereby guiding a comprehensive decision making process on transit investments. A copy of the draft plan can be found at this link:

<http://www.sjcog.org/index.aspx?nid=274>

Moving beyond the basic question of “how much money do we have to spend on transit?”, the Systems Plan provides an action plan to help better frame investment decisions that address increasing transit demand, access issues, and the need to move San Joaquin’s growing population efficiently and safely.

The Systems Plan data show that, on a regional (cumulative) level, there is not enough revenue to finance all the proposed transit system maintenance, enhancements, and improvements. The plan assumes \$1.02 billion in projected revenues to support the \$1.23 billion in public transportation needs through the planning period.



The Plan also articulates complex funding challenges that would require changes in policies to support priorities for transit investments. Those challenges are summarized in the infographic on the next page.



**Status of the Plan Development:** The 30-day public comment period has ended and revisions are underway to incorporate comments received. Also, SJCOG held five public workshops on the Regional Transit Plan, three of which were workshops for the SJCOG Board of Directors.

**Public Feedback – Policy development is not robust enough within the plan.**

The Systems Plan presented policy considerations and questions as it relates to funding policy and building a foundation to invest strategically in transit. The Systems Plan devoted a chapter entitled “Courses of Action” which discusses a menu of action areas and implementation strategies that maximize the transit investments. Those action areas involve exploring, identifying, and evaluating innovations and non-traditional approaches through recommended actions in a two-year work plan. Public feedback (which was mostly received during the SJCOG Board workshops) was critical that the plan simply did not do enough in formulating policy and articulating stronger recommendations to policymakers. SJCOG Board members expressed that the Systems Plan needed to come back with specific recommendations to address these issues.

**Development of Recommendations for the Final Draft of the Regional Transit Systems Plan**

SJCOG is seeking additional feedback to formulate policies and recommendations and some questions/considerations are summarized in Exhibit A. Exhibit B is a “working draft for discussion purposes” of possible policies to start the stakeholder engagement process.

**NEXT STEPS**

**Month of September** – COG Committee Input on Policy Development.

**September 22, 2016**—SJCOG Board discusses policy development and public feedback on the Plan.

**Late Fall 2016** – Final Draft of Regional Transit Plan for SJCOG Board Adoption

## Exhibit A: Policy Questions/Considerations for Development in Systems Plan

### Implementation of Transit Coordination

- What are 2 – 3 items for coordination opportunities (e.g. procurement, maintenance, federal auditing, dispatch?)
- Should we establish an ad hoc committee of executive decisions makers (e.g. City Mgrs, County Administrator, General Manager of Transit Agencies) to establish those 2 – 3 items?
- What is a realistic timeline and achievable (anticipated) work products?

### Modify Funding Policy and Allocation Practices

- Should the region start examining allocation for Federal Urbanized Area funding. (e.g. Fifteen percent of UZA funding from Lodi, Manteca, and Tracy was discussed during LTF process.)?
- Should there be a phasing formula for LSR in the Local Transportation Fund, and if so, what is the recommended approach?
- Should the STA Formula Apportionment be revised?

### Explore Brand new revenue (Measure K Three)

- What would be the first steps to exploring agency positions regarding a concurrent half cent transportation sales tax measure for the November 2018 ballots?

EXHIBIT B

## Developing Recommendations for the Regional Transit Systems Plan

---For Discussion Purposes to jumpstart stakeholder engagement and collaboration--

Consult with RTD and local transit operators to identify at least 3 areas for coordination; Establish an Executive Management Ad Hoc Committee (comprised of City Managers/County Administrator and CEOs of RTD and SJRRC). Report back with recommendations including cost analysis.

*Fiscal Impact: To be Determined*



Community (Regional) Benefit Apportionment for Urbanized Areas in Lodi, Manteca, & Tracy: In its role as MPO, SJCOG makes a planning recommendation to eligible recipients of UZA funding. Fifteen percent of Lodi, Manteca, Tracy UZA funding, starting in FY 16/17, is apportioned to Regional Bus or Rail Transit eligible activities.

Furthermore, recommendation includes any operating eligible for regional bus or regional rail funding must provide data on ridership to those UZAs (as a requirement) to receive funding annually. Also, for the Manteca UZA, recommendation addresses Ripon's transit needs with a proposal where 5% Share of the Manteca UZA would meet Ripon's transit needs.

*Fiscal Impact: Lodi UZA (\$1.6 M)*  
*Manteca UZA (\$1.7M)*  
*Tracy UZA (\$1.8M)*



LTF (Local Transportation Fund)- Proposal that starting in FY 16/17, phase LTF in a five-year plan that transitions use of LTF from Streets and Roads to 100% transit use. (e.g. 20%, 40%, 60%, 80%, 100%)

*Fiscal Impact: Reduction of LTF funds for Local Streets and Roads and increase of LTF funds for transit purposes.*



STA (State Transit Assistance)– Proposal that apportions 100% of STA (Section 99313) funding to San Joaquin Regional Transit District, starting in FY 16/17. Previous apportionment based upon ridership formula (e.g. 80.5% RTD, 4.4% Lodi, 1.3% Manteca, 2.3% Tracy, 11.5% SJRRC, \$5,000 minimum to Ripon and Escalon.)

*Fiscal Impact: \$2.9 Million annual apportionment in Section 99313*



Seek SJCOG Board direction to start the process and identification of next steps examining the possibility of a November 2018 ballot for a "third Measure K".

*Fiscal Impact: If approved by voters, a quarter-cent or half-cent sales tax will have enormous fiscal impacts.*

October 2016  
Board

# STAFF REPORT

**SUBJECT:** Developing Recommendations for the  
Regional Transit Systems Plan

**RECOMMENDED ACTION:** Discussion

## DISCUSSION:

### SUMMARY:

The Regional Transit Systems Plan (Systems Plan) is the long-range transit plan that looks at bus and rail transit needs, their related costs, and details a financial forecast of anticipated funding through year 2024. The Plan outlines a regional transit vision and six “action areas” that define various strategies and calls for a collaborative process with transit operators, the general public, and city/county governments to develop solutions.

SJCOG staff presented some conceptual recommendations to COG committees and the Board of Directors in September. This was done in response to the Board’s direction for meaningful recommendations addressing the public transportation funding issues. At the September 22<sup>nd</sup> Board meeting, the Board asked for a primer on the funding programs during staff’s presentation on conceptual recommendations. This “Primer” included in current staff report for the October Board. The staff report also presents a second iteration of recommendations, based upon the feedback and input, for further discussion by the Board.

### **Second “round” of recommendations and related Committee input:**

#### **Background**

At last month’s Board meeting, the Board was briefed on Committee comments related to the conceptual recommendations on for the Regional Transit Systems Plan. The recommendations examined specific policy areas impacting the Local Transportation Fund, State Transit Assistance Fund, and Federal Transit Administration 5307 Fund. The conceptual recommendations also described the formation of an Ad Hoc Committee and the need for direction on a “Measure K 3.0”.

The Board expressed that there needed to be more information on the funding programs themselves, specifically, how revenues were generated in each fund and how they were allocated within the region. (In response to this, SJCOG staff has prepared a “primer” on each of the funding programs in Attachment #1.)

Several Boardmembers also stated that there still remained more questions about funding impacts than answers. Therefore, some Board members expressed they were not ready to action on funding policy.

Discussion ensued among the Board about a “Measure K 3.0” and the related need for local streets and roads revenue. Finally, there was positive feedback from the Board about the formation of an Ad Hoc Committee comprised of the Member Agency City Managers/Administrators as CEOs of ACE and RTD. Some Board members posed the concept of the Committee going beyond transit coordination and perhaps expanding its scope of responsibilities to include examining of funding policy. SJCOG staff received direction to continue further work on developing recommendations.

Also in September, SJCOG staff contacted transit operators to get their input on the conceptual funding recommendations. All expressed various levels of concern about the policies proposed and echoed many of the comments received from the Board and SJCOG committees.

### **Updated Framework for Consideration**

With the cumulative feedback, SJCOG staff went back to the Committees in October for further discussion. First, SJCOG staff expressed the difficulty in moving forward on funding policy was predicated on two hurdles that needed to be overcome. It was hard to effectively posit changes in Local Transportation Fund apportionment from member jurisdictions when all of the LTF in the Regional Transit District boundaries were not used for public transit. The RTD boundaries are the City of Stockton and the unincorporated area. City of Stockton uses 100 percent for public transit; however, the unincorporated area divides 76 percent of their apportionment to public transit and retains 24 percent for local streets and roads. Until RTD and the County reviewed their joint agreement on LTF, SJCOG staff asserts there is an impasse on dialogue about reductions in LTF apportionment (to local streets and roads) from the cities in the region.

The other challenge was that member agencies raised the need for both better collaborations on intercity transit planning and enhanced understanding of the community benefit of intercity bus transit service and rail to their respective communities. A 1993 adopted resolution by the Transit District (then known as Stockton Metropolitan Transit District), outlined the parameters of operations with cities (Attachment #2). SJCOG staff believes there can be great value in re-visiting the key business points within the resolution about roles/responsibilities/expectations between RTD and its partners in the provision of transit service.

Once those areas are addressed, SJCOG staff believes the climate would be favorable for the formation of the above-described Ad Hoc Committee. Staff recommends the committee establish a mission to look at (1) Transit Coordination and (2) Funding Policy. Staff stresses the need to treat all agencies equitably and foster a commitment to involve all in the decision-making process. The deliverables from the committee include advisory recommendations for the Board’s consideration in addressing the public transportation funding needs in the San Joaquin region.

**Committee Feedback:**

**Technical Advisory Committee:** This committee restated its concern that public transportation was not living within its means and that local streets and roads funding was a high priority in communities. Some members felt it would take a long time to establish Memorandums of Understandings/Master agreements on the collaborative parameters between RTD and communities in working out transit planning and funding. Others expressed time was needed to truly evaluate this new set of conceptual recommendations by SJCOG staff.

**Management and Finance Committee:** The Committee was strongly in favor of acting as the Ad Hoc Committee to evaluate transit coordination and to bring forward funding policy recommendations. The County stated that executive staff are in current discussions with RTD about the joint agreement on TLF with RTD and a resolution was coming very soon. The Committee also discussed the value of individual agreements between communities and ACE on operating parameters and partnerships.

**Executive Committee:** At the time of this staff report, this committee had not met.

**Interagency Transit Committee:** At the time of this staff report, this committee had not met.

**RECOMMENDATION:**

Discussion and input on transit policy to build recommendations within the Regional Transit Systems Plan.

**NEXT STEP:**

Staff will bring back recommendations and final draft of the Regional Transit Systems Plan at the November Board meeting.

**FISCAL IMPACT:**

None at this time. Any policy development that results in funding policy will ultimately have a direct fiscal impacts on the allocation and expenditure of state, federal, and local funds in the San Joaquin region.

**ATTACHMENTS:**

1. 1993 Transit District Resolution Defining Parameters of Service
2. Primer for LTF, STA, FTA, and Measure K funds

*Prepared by: Diane Nguyen, Deputy Director*

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RESOLUTION NO. 4056  
DATED: NOVEMBER 9, 1993

RESOLUTION DECLARING NEED TO EXPAND  
DISTRICT'S BOUNDARIES TO COUNTYWIDE  
AND DEFINING PARAMETERS OF ITS OPERATION

WHEREAS, over the last three years considerable discussion regarding the expansion of public transit services throughout the region has occurred between representatives of the City of Stockton (Stockton), the Cities of Escalon, Lathrop, Lodi, Manteca, Ripon and Tracy (herein collectively referred to as the Cities and individually as the City), the County of San Joaquin (County), the San Joaquin County Council of Governments (COG) and the Stockton Metropolitan Transit District (SMTD); and,

WHEREAS, COG contracted with a consultant to study the regional needs for expanded public transit service; and,

WHEREAS, COG received and adopted a Regional Transit Systems Plan in September, 1992, that identified the immediate need for intercity, interregional and rural transit service; and,

WHEREAS, over the last year special committees have worked diligently toward the implementation of the recommendations of the Regional Transportation Systems Plan; and,

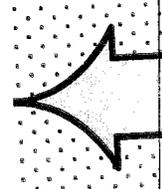
WHEREAS, COG, at its October 26, 1993, Board of Directors' Meeting, approved staff recommendations to expand SMTD through the annexation procedures contained within the SMTD Act; and,

WHEREAS, it is the desire that the expanded district evolve towards a full-regional system within five years; and,

WHEREAS, the need exists to move forward expeditiously.

NOW, THEREFORE, BE IT HEREBY RESOLVED AND ORDERED by the Board of Directors of the Stockton Metropolitan Transit District as follows:

1. That there is an immediate need to expand the SMTD boundaries to countywide.
2. That the expanded district should do business under the name of the San Joaquin Regional Transit District.
3. That the composition of the District Board of Directors will at this time remain at five members.
4. That the expanded Transit District shall provide base level intercity, interregional and rural transit services in accordance with the following:



- (a) Expanded transit services will be funded through Measure K and State Transit Assistance (STA) funds.
- (b) No Local Transportation Funds (LTF) will be used from any City unless negotiated with said City.
- (c) Increased intercity and interregional service may be negotiated through an LTF shift from the affected cities.
- (d) Cities may enter into contracts with SMTD for intracity local service.
- (e) Intercity, interregional and rural services will be subject to competitive bidding at least every five years.
- (f) The current property tax provisions of the SMTD Act will not extend to the annexed territory.
- (g) Within five (5) years of the annexation, institutional arrangements as set forth in the SMTD Act shall be re-evaluated for possible changes.

PASSED AND ADOPTED THIS 9TH DAY OF NOVEMBER, 1993, BY FOLLOWING VOTE OF THE BOARD OF DIRECTORS, TO WIT:

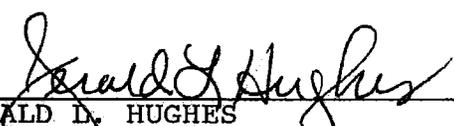
AYES: Directors Snyder, Perino, Barbour, Shaver and Smith  
 NOES: None  
 ABSENT: None

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CERTIFICATE

I, JERALD L. HUGHES, Secretary of the STOCKTON METROPOLITAN TRANSIT DISTRICT, do hereby certify that the foregoing Resolution is a full, true and correct copy of a Resolution passed by the Board of Directors of the Stockton Metropolitan Transit District at a meeting thereof held on the 9th day of November, 1993, at which meeting a quorum was present; that said Resolution has never been revoked, and the same is now in full force and effect.

DATED: November 9, 1993

  
 \_\_\_\_\_  
 JERALD L. HUGHES  
 SECRETARY OF THE BOARD OF  
 DIRECTORS OF THE STOCKTON  
 METROPOLITAN TRANSIT DISTRICT

## Urbanized Area (UZA) Formula Grants

The Urbanized Area Formula Funding program makes federal resources available to urbanized areas, and to governors for transit capital and operating assistance in urbanized areas and for transportation-related planning. An urbanized area is an incorporated area with a population of 50,000 or more that is designated as such by the U.S. Department of Commerce, Bureau of the Census.

- Who establishes funding policy for this Category?
  - 49 U.S. Code § 5307, 49 U.S. Code § 5337, 49 U.S. Code § 5339 as determined by FTA
  - SJCOG Board
- Who is Eligible?
  - Urbanized areas in San Joaquin County include:
    - Lodi UZA (includes City of Lodi and unincorporated areas outside of Lodi)
    - Manteca UZA (includes Cities of Manteca and Ripon and unincorporated areas)
    - Stockton UZA (includes Cities of Stockton and Lathrop and unincorporated areas)
    - Tracy UZA (includes City of Tracy and unincorporated areas outside of Tracy)
  - Designated recipient, defined as a public body with the legal authority to receive and dispense federal funds are responsible for distributing the funds to public transportation operators within a UZA. Funding may be allocated to any public transportation operator within a UZA, provided that each public transportation system serving the UZA is a party to a jointly prepared written agreement outlining the distribution of funding.
  - SJRTD is the designated recipient for the Stockton UZA, while Caltrans is the designated recipient for the Lodi, Manteca, and Tracy UZAs.
- What types of projects are eligible?
  - Planning (e.g., Short-Range Transit Plans)
  - Engineering, design, and evaluation of transit projects
  - Capital investments (e.g., replacement vehicles, track improvements, signals)
  - Operating assistance for UZAs less than 200,000 in population
  - Operating assistance for UZAs greater than 200,000 in population, if identified by FTA
  - **All projects must serve the residents of the UZA for which funds were apportioned.**
- How much funding is received?
  - UZAs of 50,000 to 199,999 in population, funding is apportioned based on proportion of population and density. The Lodi, Manteca, and Tracy UZAs each typically receive between \$1,500,000 and \$2,000,000 per year.
  - UZAs over 200,000 in population, funding is apportioned based on a combination of bus revenue vehicle miles, bus passenger miles, fixed guideway revenue vehicle miles, and fixed guideway route miles as well as population and population density. The Stockton UZA typically receives over \$7,000,000 per year.
- What has been funded in the past?
  - Vehicle replacements
  - Transit operations
  - Transit facility improvements
  - Transit plans
  - Capital cost of contracting

# PRIMER

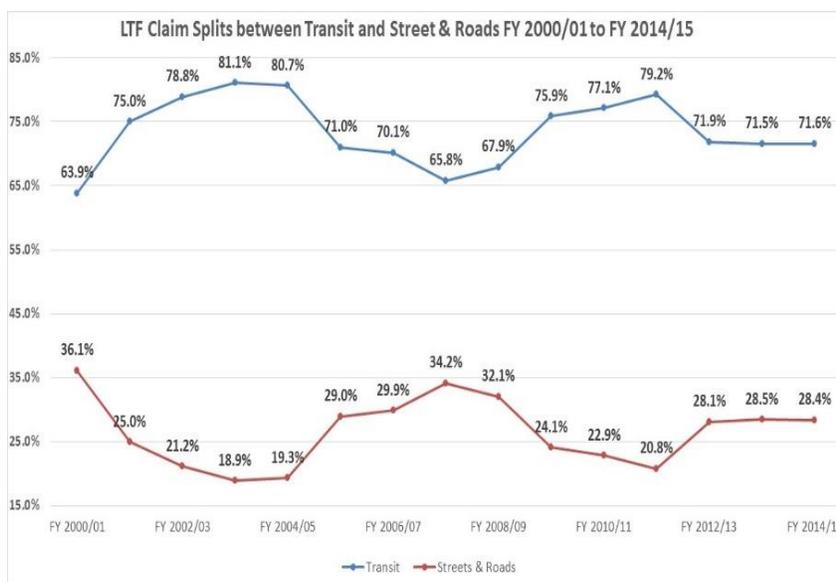
## Local Transportation Fund (LTF)

In 1971, the Transportation Development Act was passed to provide funding to counties for transit purposes. The TDA has two major funding sources, the Local Transportation Fund (LTF) and the State Transit Assistance Fund (STA). The LTF is derived from a statewide ¼-cent general sales tax and is collected by the state and returned to each County for distribution. Counties with a population less than 500,000 at the 1970 Census are allowed to use LTF funds for Local Streets and Roads purposes if they have a population less than 100,000 and following a finding of no Unmet Transit Needs being made. LTF does not return to source for cities and counties based upon taxes generated by a jurisdiction.

- Who establishes funding policy for this Category?
  - State statutes as outlined in the California Government Code and Public Utilities Code and implemented by Caltrans
  - SJCOG Board
- Who is Eligible?
  - Cities and San Joaquin County
  - San Joaquin RTD
  - San Joaquin Regional Rail Commission
  - City of Stockton (Pedestrian and Bicycle Facilities Only)
  - SJCOG
- What types of projects are eligible? In priority order:
  - TDA Administration
  - SJCOG Planning and Programming
  - Pedestrian and Bicycle facilities
  - Rail passenger service operations and capital improvements
  - Community Transit Services (by a Consolidated Transit Services Agency)
  - Article 4 & 8 Public Transportation Service Operations
  - Article 8 Local Streets & Roads
- How much funding is received?
  - Varies depending on sales tax collection. Approximately \$25.2 million annually as of FY 14/15, and \$321 million total since FY 2000/01.

- What has been funded in the past?

- SJCOG TDA administration and planning
- Bicycle and pedestrian facilities
- Rail Passenger operations
- Bus Transit operations
- Local Streets and Road repair

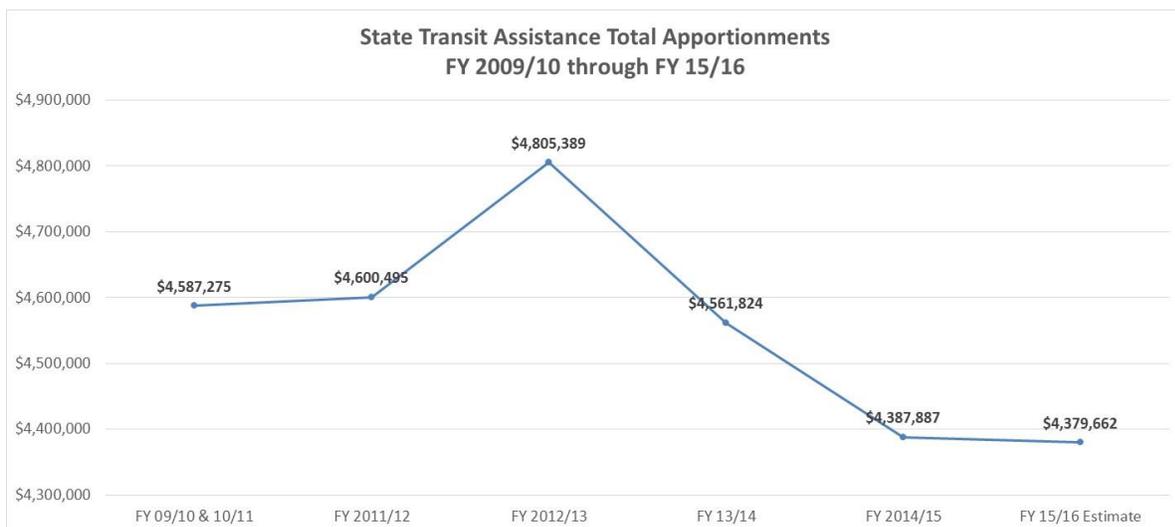


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## State Transit Assistance (STA)

In 1971, the Transportation Development Act was passed to provide funding to counties for transit purposes. The TDA has two major funding sources, the Local Transportation Fund (LTF) and the State Transit Assistance Fund (STA). The STA is derived from the statewide sales tax on diesel fuel. 50% of the funds are distributed based on population (PUC Section 99313) and 50% of the funds are distributed based upon transit operator revenues from the prior fiscal year (PUC Section 99314). STA does not return to source to local jurisdictions based upon taxes generated by a jurisdiction.

- Who establishes funding policy for this Category?
  - State statutes as outlined in the California Government Code and Public Utilities Code and implemented by Caltrans
  - SJCOG Board
- Who is Eligible?
  - Transit Operators
  - SJCOG Transit Planning
- What types of projects are eligible?
  - STA funds can only be used for Transit Planning and Transit Operations
- How much funding is received?
  - Varies depending on diesel sales tax collection. Approximately \$4.6 million annually.
  - ACE additionally receives STA revenue from Alameda County and Contra Costa County
- What has been funded in the past?
  - SJCOG transit planning
  - ACE operations
  - SJRTD Operations
  - City of Lodi Bus Transit Operations
  - City of Ripon Bus Transit Operations



# PRIMER

## Measure K Renewal Transit Category

30% of Measure K Renewal revenues is devoted to the Passenger Rail, Bus, and Bicycles category of Measure K. Of this, 39% of the revenue is used for the Passenger Rail Subcategory, 49% for the Bus Transit Subcategory, 5% for the Bus Rapid Transit Capital category, and 7% for the Bicycle, Pedestrian, and Safe Routes to School Subcategory. Measure K does not return to source for cities and counties based upon taxes generated by a jurisdiction.

### Passenger Rail Subcategory

- Who establishes funding policy for this Category?
  - The voters of San Joaquin County and the SJCOG Board
- Who is Eligible?
  - San Joaquin Regional Rail Commission
- What types of projects are eligible?
  - Costs related to Passenger Rail operations and capital improvements
- How much funding is received?
  - 39% of Measure K Transit Category funding, or approximately \$5.5 million annually, with Measure K revenue growing at approximately 4.5% annually
- What has been funded in the past?
  - SJRRC and ACE Operations
  - Rail Maintenance Facility Debt Service and Capital Improvements
  - Capital spare parts for locomotives and rolling stock
  - UPRR Capital Access Fees and required maintenance projects
  - Cabral Station Track Extension
  - SJCOG Consolidated Loan Repayments
  - Implementation of Positive Train Control federal mandate

### Bus Transit Subcategory

- Who establishes funding policy for this Category?
  - The voters of San Joaquin County and the SJCOG Board
- Who is Eligible?
  - San Joaquin RTD, City of Escalon, City of Lodi, and City of Ripon
  - The City of Tracy is not currently eligible for Measure K Bus Transit funds, as their population exceeds 75,000 and they do not use 100% of their LTF funds on transit
  - The City of Manteca does not currently use Measure K Bus Transit funds, but they are currently eligible until their population exceeds 75,000, anticipated in 2016-17. If Manteca then used 100% of their LTF funds on transit they could receive Measure K.
  - The City of Lathrop does not currently operate a transit service.
- What types of projects are eligible?
  - Costs related to Bus Rapid Transit operations and capital improvements
  - Costs related to Interregional/intra-city commute buses, intercity and elderly/persons with disabilities bus service and passenger amenities
  - Park and Ride lots and Ridesharing

# PRIMER

- Bus service to Modesto from Ripon and Escalon
- How much funding is received?
  - Approximately \$6.5 million annually, with Measure K revenue growing at approximately 4.5% annually
  - SJRTD required to receive a minimum of 50% of the funding
  - Cities of Escalon and Ripon receive 50% of their population share of the funding for service to Modesto, or approximately 0.5% and 1% respectively.
- What has been funded in the past?
  - Escalon eTrans Operations to Modesto
  - Ripon Blossom Express Operations to Modesto
  - Lodi Grapevine Bus Operations (FY 11/12 – FY 13/14)
  - SJRTD Interregional Commuter Service Operations
  - SJRTD Intercity Bus Service Operations
  - SJRTD BRT Express Service Operations
  - SJRTD Passenger Amenities
  - SJRTD Park and Ride Lease Lots
  - SJRTD Regional Transportation Center
  - City of Ripon Jack Tone Road Park and Ride Lot

## Bus Rapid Transit Subcategory

- Who establishes funding policy for this Category?
  - The voters of San Joaquin County and the SJCOG Board
- Who is Eligible?
  - San Joaquin RTD
- What types of projects are eligible?
  - Costs related to Bus Rapid Transit capital improvements
- How much funding is received?
  - 5% of Measure K Transit Category, or approximately \$700,000 annually, with Measure K revenue growing at approximately 4.5% annually
- What has been funded in the past?
  - SJRTD Regional Transportation Center
  - SJRTD BRT Passenger Amenities for BRT IV (MLK Jr. Blvd Corridor) and BRT V (Crosstown/Miner/Fremont Corridor)

## Bicycle, Pedestrian, and Safe Routes to School Subcategory

- Who establishes funding policy for this Category?
  - The voters of San Joaquin County and the SJCOG Board
- Who is Eligible?
  - Cities, San Joaquin County, transit operators, school districts, and 501(c)(3)s depending on project type
- What types of projects are eligible?
  - Bicycle and pedestrian infrastructure

# PRIMER

- Safe Routes to School infrastructure and non-infrastructure projects
- Maintenance projects are ineligible for Measure K funds from this subcategory
  
- How much funding is received?
  - 7% of Measure K Transit Category. Funding is anticipated to begin in FY 21/22 at \$1.6 million, increasing 4.5% annually
  - 40% of the funds are non-competitively allocated to local jurisdictions based on their population share and 60% of the funds are awarded through a competitive process
  
- What has been funded in the past?
  - No funding has been available in this subcategory due to Measure K cashflow issues.

**PUBLIC  
WORKSHOP**

# Regional Transit Systems Plan

**Strategically Investing in Public  
Transportation**

**July 14, 2016**

**10 a.m. to 11:30 a.m.**

**July 20, 2016**

**6 p.m. to 7:30 p.m.**

Hear about the draft plan and give some feedback on the future of regional transit in San Joaquin County.

Plan is available for review at [www.sjcog.org/rtsp](http://www.sjcog.org/rtsp)

**Location:**  
**San Joaquin Council of Governments**  
**555 E. Weber Avenue**  
**Stockton, CA 95202**

**ATTACHMENT 3: BOARD WORKSHOP FLYERS**



# REGIONAL TRANSIT SYSTEMS PLAN

*SJCOG BOARD WORKSHOP SERIES*

## PLEASE JOIN US!

The San Joaquin Council of Governments (SJCOG) invites you to attend 3 workshops for the SJCOG Board of Directors on the 2015 Regional Transit Systems Plan.

Each workshop will cover the various topics and take place on the following dates:

- 1** **July 27, 2016**  
*Transit Service Coordination*
- 2** **August 10, 2016**  
*Intercity Transit Service*
- 3** **August 24, 2016**  
*Innovations in Transit*

*The workshops are open to the public. All workshops will be held at the same location and time on their respective posted dates.*

**7:30am -  
9:00 am**

SJCOG Board Room  
555 E. Weber Avenue  
Stockton, CA 95202

For more info, please visit: [www.sjcog.org/rtsp](http://www.sjcog.org/rtsp).

## WORKSHOP 1 | JULY 27, 2016

### TRANSIT SERVICE COORDINATION

How do we, as a region, coordinate transit services among the different transit operators to identify (and eliminate) redundancies in operations? This includes but is not limited to, discussion of a Consolidated Transit Services Agency and case study examples of successes in the industry in this area. Possible examples of streamlining may be in coordinating procurement, vehicle maintenance, dispatching, etc. in a "one-stop shop" so multiple transit agencies are not performing the same function.

#### *Guest Speaker & Facilitator:*



**Phil McGuire of Innovative Paradigms**  
With over 35 years of experience, Phil is a leader in the field of community transit operations and works with public agencies and nonprofit organizations to design and implement coordinated transportation plans.





# REGIONAL TRANSIT SYSTEMS PLAN

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- 3** August 24, 2016  
*Innovations in Transit*

*The workshops are open to the public. All workshops will be held at the same location and time on their respective posted dates.*

**7:30am -  
9:00 am**

SJCOG Board Room  
555 E. Weber Avenue  
Stockton, CA 95202

**WORKSHOP 2 | AUGUST 10, 2016**

## REGIONAL RAIL & BUS TRANSIT SERVICE

What is the future of regional bus transit service and rail transit service in the San Joaquin region? How do the expansion plans for both regional systems move people between urban areas and communities?

*Guest Speakers:*



**Donna DeMartino**  
General Manager/CEO  
SJRTD



**Dan Leavitt**  
Manager of Regional Initiatives  
SJRRRC/ACE

*For more info, please visit: [www.sjcog.org/rtsp](http://www.sjcog.org/rtsp).*





# REGIONAL TRANSIT SYSTEMS PLAN

SJCOG BOARD WORKSHOP SERIES

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**7:30am -  
9:00 am**

SJCOG Board Room  
555 E. Weber Avenue  
Stockton, CA 95202

For more info, please visit: [www.sjcog.org/rtsp](http://www.sjcog.org/rtsp).

## WORKSHOP 3 | AUGUST 24, 2016

### INNOVATIONS IN TRANSIT

A thought provoking discussion on new technologies and alternative solutions to move people in the region, both in urban and rural communities. This workshop will also discuss and explore how to address rural transit needs.

#### *Guest Speakers\**

**Caroline Rodier**  
UC Davis Institute of  
Transportation Studies



**Laura Bisesto**  
Public Policy Manager  
Government Relations  
Lyft



**Ben Miller**  
Journalist/Staff Writer for  
*Government Technology* and  
*FutureStructure*



\*See other side for speaker bios.





### *Speaker Bios:*

**Dr. Caroline Rodier** is a Research Scientist at the National Center for Sustainable Transportation led by the Institute of Transportation Studies, University of California at Davis. Her major areas of research include transport, land use, and environmental planning and policy analysis. Her current research involves the design and evaluation of new shared use mobility systems. This research includes travel modeling to forecast the travel and vehicle emission effects of dynamic ridesharing services and designing a shared use pilot project to serve disadvantaged populations in the San Joaquin Valley. She currently serves as the Chair of the National Academies of Sciences' Transportation Research Board Committee on Emerging and Innovative Public Transport and Technologies. She holds a B.A. in US History from Barnard College and a M.S. in Community Development and Ph.D. in Ecology from the University of California at Davis. Dr. Rodier will speak on the Rural Transit Study she is managing for the San Joaquin Valley.

**Laura Bisesto** is a Public Policy Manager on Lyft's Government Relations team. Laura oversees political and policy strategy in the Pacific Northwest, Arizona, and California by advocating for Lyft's interests with legislators and regulators on state and local bills relating to ridesharing. Prior to joining Lyft's Government Relations team in 2015, Laura spent five years working as an Assistant District Attorney in San Diego and San Francisco counties where she served as the lead attorney in over two dozen jury trials. Prior to that, she spent a year on the California Supreme Court's Criminal Central Staff making recommendations on petitions for review.

**Ben Miller** is a reporter for *Government Technology* magazine and the primary writer for *FutureStructure*, a sub-website dedicated to exploring connections between various aspects of government. His beat has focused on transportation, transit, energy, water, information technology and data. His past experience includes writing for print and web publications about business, communities, technical subjects and breaking news. He holds a Bachelor's degree in journalism from the Reynolds School of Journalism at the University of Nevada, Reno, and lives in Sacramento. Ben will speak in his capacity as a journalist covering transportation technology and government in general.



# ATTACHMENT 4: COMMENT LETTER FROM SAN JOAQUIN COUNTY

## San Joaquin County Department of Public Works Comments To Regional Transit Systems Plan

- HANDWRITTEN  
NOTATIONS MADE  
BY SJCOG STAFF

### General Comments

A

County opposes changing the STP funding distribution formula to include transit operators. The STP program is not intended to provide funding for transit operations. The STP funds should not include transit as they are directly benefiting from the roadway preservation strategies that each agency uses to maintain their federal aid routes.

Transit funding should be largely performance based. All funds are the result of taxes or fees imposed on the public and the use of the funds should be tied to the effectiveness of the service provided.

Per the draft plan:

B

1. -through 2024 the Transit system in the County will cost \$1.23 billion and the Transit Revenue over the same time period is estimated to be \$1.02 billion. How will the shortfall be made up? What cost reduction strategies will be employed?
2. Bus operators will need \$675 million and SJCOG has identified \$594 million in revenue. Again, how will shortfall be made up and what cost reduction opportunities are there?
3. Rail will need \$552 million and revenue is projected to be \$429 million. Same question as 1 & 2 above.
4. The plans calls for savings by providing more efficient service but does not go into any detail on what is proposed. Please identify efficiency strategies and respective estimated cost savings.
5. The plan lists a number of potential strategies to make up the shortfall that will need SJCOG policy changes.
  - a. Based on current policy& practices approx. \$525 million is pledged directly to individual operators. Some operators will be overfunded and others underfunded. Any new policies should first utilize available funding to address this imbalance before considering other policies.
  - b. The County has strong concerns regarding changing the CMAQ distribution Policy to direct a portion to rail or bus transit without supporting air quality improvement data.
  - c. The County opposes any change to the distribution formula for STP to include transit operators. STP funds are not intended to fund transit operations.
  - d. New project selection criteria for competitive based funding programs needs to be tied to performance standards.

Specific Comments

C

Pg ES4: Transit System Quick Facts –

Seems like too many different services, is there duplication? Can some services be purged?

D

Pg ES5: Fixed Route BRT and Local Performance –

Operating Costs per Passenger is \$5 and subsidy per passenger is \$4 that makes the Fare Box recovery 20% not 16% as noted.

Intercity Hopper Performance – numbers and percentages don't add up.

Pg ES6: 10-Yr Funding Outlook-

Looks like a wish list... how does this tie to demand? Are the existing routes over capacity? Need boarding and alighting data to support demand assumptions.

Pg ES7: City of Escalon –

Annual Ridership is 1614; given 260 week days per year the daily ridership calculates to 6 passengers per day. Operating cost for this service is \$50 per passenger. This service should be replaced by a contract with private transit provider such as Uber or Lyft etc.

Dial- A-Ride Performance –Same as above comment.

Pg ES9: City of Lodi –

Demand Responsive Performance... This service should be replaced by a contract with private transit provider such as Uber or Lyft etc.

E

Pg ES11: City of Manteca –

Dial-A-Ride Performance... This service should be replaced by a contract with private transit provider such as Uber or Lyft etc.

Pg ES 13: City of Ripon –

Van Service Performance... looks like the daily ridership is 3 passenger maximum... This service should be replaced by a contract with private transit provider such as Uber or Lyft etc.

Pg ES15: City of Tracy –

Dial-A-Ride Performance... This service should be replaced by a contract with private transit provider such as Uber or Lyft etc.

Pg A1-1:

The Plan recognizes fully that a discussion of strategic transit investments and related policy development cannot be viewed simply through the lens of "how much money do we have to

pay for the transit system." Question is why not? A responsible plan would be fiscally and financially constrained.

F Pg A2-3:

From another perspective, 1 out of 10 persons have a disability, 4 out of 10 may be too young or old to drive, and 1 in 4 persons may not be able to afford a personal vehicle... This statement is confusing at best. In other words a young person with disability and under poverty line can fit in all three categories mentioned above. There may be overlaps in these socio-economic measures.

A2-4:

"Additionally, 26 percent of employed residents worked outside of San Joaquin County in 2010",... "Of the 233,200 residents representing the employed workforce, approximately 114,610 commute outside of the region to their employment site" The above two statements do not add up mathematically.

"Additionally, 26 percent of employed residents worked outside of San Joaquin County in 2010"... "Of the 233,200 residents representing the employed workforce, approximately 114,610 commute outside of the region to their employment. By 2040, the vehicles miles traveled by individual drivers (VMT per capita) will increase 70 percent employment sites"... The above two statements do not add up mathematically.

G Pg A4-1:

"By 2040, the vehicles miles traveled by individual drivers (VMT per capita) will increase 70 percent" This may not be true. Why would the distances travelled by the existing residents increase?

"Widening roads cannot be the primary solution to increasing travel demand in a region with a population as diverse as its need for transportation options and accessibility"... Statement too general, assumes that the local streets are already over capacity, which may not be the case. Cities are continually updating their GP to accommodate their anticipated growth.

"The regional solution is to create a public transportation system that addresses goals for environmental preservation, energy conservation, public health, the safety and security of the transportation system, and economic vitality.".... If these are the goals they should be evaluated for Measure of effectiveness for all routes and services.

"Such a transit system must be safe, reliable, accessible, and convenient"... need to add cost-effective and sustainable.

H Pg A4-4:

"2. Develop a transit system which addresses to the greatest extent possible the needs for air quality and congestion management." This should be an MOE. Routes with 10 or less passengers, at any time during the day, should be evaluated for air quality and congestion reduction benefits.

"The provision of alternative transportation modes must be viable and cost-effective in order to de-emphasize the reliance on single occupancy vehicles (SOV)."... These alternatives should include bicycling and pedestrian travel.

"Additionally, the cost for the replacement of buses, train cars, tracks, security upgrades, fare machines, and other capital equipment far outpaces available funds. And just as with local streets and roads, delayed (or deferred) maintenance of the transit system leads to even costlier rehabilitation down the road."... How about leasing buses instead of buying, this may reduce life-cycle cost because of low maintenance cost in early years.

H  
Pg B1-3:

Interagency Transit Committee – The membership is comprised of representatives from each of the transit agencies as well as from each member jurisdiction. Why is the City of Stockton and San Joaquin not represented?

J  
Pg B1-5:

It is interesting to note that work related trips using public transit are the least. Religious Services related use the highest. That means that our focus of connecting job sites and home is not going to provide the desired results. We need to refocus our thinking and associated policies.

K  
Pg B1-6:

Contrary to the conclusion stated, the survey data suggest that the Dial-A-Ride (i.e. door to door and customized travel) service followed by service to Modesto Area (Hospitals and Mall) and service to Sacramento are most desirable.

L  
Pg B2-3:

Subsidies for Metro Hopper and Demand Response services are the highest therefore these two services should be minimized and or replaced with private door to door service providers such as Uber, Lyft etc.

Pg B2-4:

Replacement of Hopper Buses and 42 non-revenue vehicles should be reevaluated.

Pg B3-4:

What triggers the fleet expansion? Are the four trains running at capacity? If not, no need to expand. Revise the expenditures accordingly.

M  
Pg B4-3

Subsidy per Passenger for both, Deviated Fixed Route and Dial-a-Ride are too much. Alternative Private Service provider such as Uber, Lyft etc. should be explored.

B5-3:

Subsidy for DAR is excessive... Need to explore private service provider such as Uber, Lyft etc.

B8-2:

Subsidy for DAR is excessive... Need to explore private service provider such as Uber, Lyft etc.

Pg C2-3:

The table creates an impression that CMAQ is totally dedicated to Transit, which is not the case. Roadway operations improvement projects are equally qualified for CMAQ funding.

Pg D1-4:

Action Area #2, b) Develop Evaluation criteria...develop multiple scenarios, one with fiscal constraints.

Pg D1-8:

Action Area #6.c) Explore the possibility of putting additional sales tax measure.. Prior to this we need to reexamine the transit future needs and make sure that cost cutting measures such as privatizing high subsidy transit elements such as Dial-a-ride will not bring the future expenditures within available future revenues.