



AGENDA
Meeting
of the
BOARD OF DIRECTORS
of the
SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
A Public Agency
Tuesday, February 23, 2010
8:30 a.m. CLOSED SESSION
9:00 a.m. REGULAR BOARD MEETING
Santa Barbara MTD Auditorium
550 Olive Street, Santa Barbara, CA 93101

1. CALL TO ORDER

2. ROLL CALL OF THE BOARD OF DIRECTORS

Dave Davis, Chair; Roger Aceves, Vice Chair; Chuck McQuary, Secretary; Dick Weinberg, Director; Sharon Anderson, Director; Brian Fahnestock, Director; John Britton, Director

3. REPORT REGARDING POSTING OF AGENDA

4. RECESS TO CLOSED SESSION-GENERAL MANAGER PERFORMANCE EVALUATION (ACTION MAY BE TAKEN)

Conference with Labor Negotiators pursuant to Government Code Section 54957.6:

SBMTD designated representatives: MTD Board of Directors

SBMTD unrepresented employee: General Manager, Sherrie Fisher

PUBLIC COMMENT WILL BE ALLOWED RELATED TO THE CLOSED SESSION ITEM(S) BEFORE THE RECESS.

PUBLIC COMMENT

Members of the public may address the Board on items within the jurisdiction of the Board that are not scheduled for public hearing. The time allotted per speaker will be at the discretion of the Board Chair. If you wish to address the Board under this item number, please complete and deliver to the MTD Board Clerk **before the meeting is convened**, a "Request to Speak" form including a description of the subject you wish to address. Additional public comment will be allowed during each agenda item, including closed session items. Please fill out the Request to Speak form and indicate the agenda item # that you wish to comment on.

TIME CERTAIN 9:00 A.M. REGULAR BOARD MEETING

CONSENT CALENDAR

5. APPROVAL OF PRIOR MINUTES (ATTACHMENT- ACTION MAY BE TAKEN)

The Board will be asked to waive the reading of and approve the draft minutes for the meetings of February 9, 2010.

6. CASH REPORT- (ATTACHMENTS- ACTION MAY BE TAKEN)

The Board will be asked to review the cash reports for February 2, 2010 through February 15, 2010.

THIS CONCLUDES THE CONSENT CALENDAR

7. PUBLIC COMMENT

Members of the public may address the Board on items within the jurisdiction of the Board that are not scheduled for public hearing. The time allotted per speaker will be at the discretion of the Board Chair. If you wish to address the Board under this item number, please complete and deliver to the MTD Board Clerk **before the meeting is convened**, a "Request to Speak" form including a description of the subject you wish to address. Additional public comment will be allowed during each agenda item, including closed session items. Please fill out the Request to Speak form and indicate the agenda item # that you wish to comment on.

8. UPDATE- CITY OF SANTA BARBARA (ACTION MAY BE TAKEN)

The Board will receive an update from the City of Santa Barbara Council MTD Liaison.

9. TRANSPORTATION DEVELOPMENT ACT TRIENNIAL PERFORMANCE AUDIT (INFORMATIONAL)

Staff will update the Board on the elements of the Triennial Review Audit.

10. SERVICE PLANNING CRITERIA AND EVALUATION PROCESS- (ACTION MAY BE TAKEN)

The Board will review and comment on the updated Service Planning Criteria & Evaluation Process.

11. PROPOSED BUDGET REVISIONS FOR FY 09-10 (ACTION MAY BE TAKEN)

The Board will review the proposed budget revisions for FY 2009/10.

12. GENERAL MANAGERS REPORT- (ACTION MAY BE TAKEN)

- a. Valley Express Funding
- b. Bus Shelters
- c. Hybrid Vehicle Update
- d. Upon Request Late Night Trips
- e. Other

13. OTHER BUSINESS AND COMMITTEE REPORTS- (ACTION MAY BE TAKEN)

The Board will report on related public transit issues and committee meetings.

14. ADJOURNMENT

AMERICANS WITH DISABILITIES ACT: If you need special assistance to participate in this meeting, please contact the MTD Administrative Office at 963-3364 at least **48 hours in advance** of the meeting to allow time for MTD to attempt a reasonable accommodation.



DRAFT MINUTES
Meeting
of the
BOARD OF DIRECTORS
of the
SANTA BARBARA METROPOLITAN TRANSIT DISTRICT
A Public Agency
Tuesday, February 9, 2010
8:30 a.m.
Santa Barbara MTD Auditorium
550 Olive Street, Santa Barbara, CA 93101

1. CALL TO ORDER

Chair Davis called the meeting to order at 8:30 a.m.

2. ROLL CALL OF THE BOARD OF DIRECTORS

Chair Davis reported that all Board members were present with the exception of Director Anderson.

3. REPORT REGARDING POSTING OF AGENDA

Imelda Martin, Executive Assistant to the General Manager and Board of Directors, reported that the agenda was posted on Friday, February 5, 2010 at MTD's administrative offices, emailed and mailed to those on the agenda minutes list, and posted on MTD's website

CONSENT CALENDAR

4. & 5. APPROVAL OF PRIOR MINUTES & CASH REPORT ATTACHMENT- (ACTION MAY BE TAKEN)

Director Aceves moved to approve the draft minutes for the meetings of January 26, 2010 and the cash report for January 19, 2010 through February 1, 2010. Director McQuary seconded the motion. The motion passed unanimously.

THIS CONCLUDES THE CONSENT CALENDAR

6. PUBLIC COMMENT

There was no public comment made.

7. UPDATE- CITY OF SANTA BARBARA (ACTION MAY BE TAKEN)

Chair Davis welcomed newly appointed City of Santa Barbara Councilmember and City appointed MTD Liaison Michael Self to the MTD Board meeting. Ms. Self reported that the City of Santa Barbara may be looking at an approximate \$9 million dollar budget deficit in the current fiscal year.

Councilmember Self also reported that there is a special workshop scheduled Thursday, February 11th regarding Plan Santa Barbara. She encouraged MTD staff to bring their comments.

8. HEALTH INSURANCE (ATTACHMENT- ACTION MAY BE TAKEN)

Director Fahnestock moved to authorize the renewal of Staff Medical and Dental Insurance. Director Aceves seconded the motion. The motion passed unanimously.

9. QUARTERLY STAFF REPORTS (ATTACHMENT- ACTION MAY BE TAKEN)

General Manager Fisher reviewed the quarterly staff reports for the period of October 1, 2009 through December 31, 2009.

Following a discussion, Director Aceves asked staff to return with a report of number of passengers per trip on the (request) portion of the line 7.

In response to a comment from Director McQuary at a previous Board meeting regarding the District's Goals and Objectives, General Manager Fisher reported that they are included in the Short Range Transit Plan. However, General Manager Fisher stated that staff will return to the Board with a review of MTD's Mission Statement as well as the Performance Standards to ensure any changes are included in the upcoming update of the Short Range Transit Plan.

10. SIX-MONTH FINANCIAL STATEMENTS (ATTACHMENT- ACTION MAY BE TAKEN)

Assistant General Manager/ Controller, Jerry Estrada reviewed the Six-Month Financial Statements for FY09/10. Mr. Estrada reported that the trend of declining sales tax revenue (TDA-LTF) continued through the six-month period ending December 31, 2009. Furthermore, Mr. Estrada stated that if the local economy does not improve, the decline in TDA-LTF sales tax revenue will have a long-term negative impact on the District's operating budget. As it pertains to the short-term financial results, Mr. Estrada reported that the District's operating budget variance for the aforementioned period was positive as a decline in revenue was offset by lower expenses.

11. GENERAL MANAGERS REPORT- (ACTION MAY BE TAKEN)

General Manager Fisher reported that she and Mr. Maas had attended a Solvang City Council meeting, at which support for the Valley Express funding request was passed unanimously.

General Manager Fisher reported that MTD has been approached by Santa Barbara County Association of Governments (SBCAG) with a request to conduct an on board survey. Following further discussion among the Board members, Director McQuary stated that in his experience it is a burden for the driver to conduct the survey. He suggested that perhaps SBCAG could provide funding to provide surveyors. The Board unanimously agreed to direct staff to draft a letter to SBCAG to request that they provide funding for the survey

In response to a question from Chair Davis, General Manager Fisher responded that staff will provide the Board with a report on the Hybrid buses which were moved off the Lines 1 & 2 to the Lines 6 & 11 due to the Stone Pine trees on Anapamu Street. Director Fahnestock asked that staff contact the City of Santa Barbara suggesting that if parking is removed at the problem area at Olive and Anapamu Street the bus can avoid contact with the tree branch.

Following a question from Director McQuary, General Manager Fisher stated that staff will return to the full Board with details on the specifics of TDA Audits.

12. OTHER BUSINESS AND COMMITTEE REPORTS- (ACTION MAY BE TAKEN)

Director Aceves requested a closed session item with the Human Resources and Personnel Committee Meeting on February 23, 201 followed by the regularly scheduled Board Meeting at 9:00 a.m.

13. ADJOURNMENT

Director Aceves moved to adjourn the meeting at 9:51 a.m. Director Britton seconded the motion. The motion passed unanimously.

AMERICANS WITH DISABILITIES ACT: If you need special assistance to participate in this meeting, please contact the MTD Administrative Office at 963-3364 at least **48 hours in advance** of the meeting to allow time for MTD to attempt a reasonable accommodation.

Santa Barbara Metropolitan Transit District
Cash Report
Board Meeting of February 23, 2010
For the Period February 2, 2010 through February 15, 2010

MONEY MARKET

Beginning Balance February 2, 2010 **\$812,632.97**

LAIF Incoming	500,000.00
Accounts Receivable	246,344.11
Passenger Fares	166,329.54
Advertising & Prepaid Dep	96,350.05
UCSB Fares	95,315.05
Miscellaneous	1,243.85
Interest Inc - Jan 10	1,022.54
Property Tax Revenue	976.16
Total Deposits	1,107,581.30

Bank Fee - Jan 10	36.00
ACH Garnishment Trf	(2,703.31)
WC Reimb. - Jan 10	(14,665.64)
ACH Pensions Transfer	(34,700.85)
ACH Tax Deposit	(126,184.77)
Payroll Transfer	(279,646.35)
Operations Transfer	(431,395.48)
Total Disbursements	(889,260.40)

Ending Balance **\$1,030,953.87**

CASH INVESTMENTS

LAIF Account	\$5,769,837.26
Money Market Account	1,030,953.87

Total Cash Balance **\$6,800,791.13**

SELF INSURED LIABILITY ACCOUNTS

WC / Liability Reserves as of Feb 15, 2010	(\$1,257,291.03)
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Working Capital **\$5,543,500.10**

**Santa Barbara Metropolitan Transit District
Accounts Payable**

Check #	Date	Company	Description	Amount	Voids
93539	9/11/2009	SEELEY-RUIZ, KAREN	PAYROLL RELATED	75.69	V
93894	10/23/2009	SEELEY-RUIZ, KAREN	PAYROLL RELATED	75.69	V
94128	11/20/2009	SEELEY-RUIZ, KAREN	PAYROLL RELATED	75.69	V
94672	2/4/2010	AMERICAN NAMEPLATE COMPANY	ENGRAVING SERVICES	20.88	
94673	2/4/2010	ASBURY ENVIRONMENTAL SERVIC	WASTE OIL RECYCLER	40.00	
94674	2/4/2010	ASPEN PUBLISHERS, INC.	SUBSCRIPTION	126.80	
94675	2/4/2010	BIG BRAND TIRES	TIRES- SERVICE VEHICLE	427.01	
94676	2/4/2010	BNS ELECTRONICS, INC.	GIB. SITE RENTAL	230.56	
94677	2/4/2010	BOMAR SECURITY & INVESTIGATI	SECURITY SERVICES	714.56	
94678	2/4/2010	BROWN & BROWN/WHILT FATCH	DIRECTORS/OFFICERS INSURANCE	500.00	
94679	2/4/2010	CALIFORNIA ELECTRIC SUPPLY, IN	SHOP/B&G SUPPLIES	20.86	
94680	2/4/2010	CARQUEST AUTO PARTS	BUS PARTS & SUPPLIES	972.36	
94681	2/4/2010	COMMUNITY RADIO, INC.	GIB. SITE RENTAL	225.35	
94682	2/4/2010	CINTAS FIRST AID & SAFETY DB	FIRST AID SUPPLIES	379.72	
94683	2/4/2010	COAST TRUCK PARTS	BUS PARTS	36.36	
94684	2/4/2010	CUMMINS CAL PACIFIC LLC	BUS PARTS	2,051.17	
94685	2/4/2010	DOCUPRODUCTS CORPORATION	COPIER COPIES & SUPPLIES	334.99	
94686	2/4/2010	EASY LIFT TRANSPORTATION, INC.	ADA SUBSIDY	47,867.00	
94687	2/4/2010	FISHER, SHERRIE	REIMBURSEMENT	327.00	
94688	2/4/2010	GFI GENFARE, INC.	FAREBOX REPAIRS & PARTS	889.37	
94689	2/4/2010	GIBBS INTERNATIONAL INC	BUS PARTS/SUPPLIES	3,400.32	
94690	2/4/2010	GOODYEAR TIRE & RUBBER CO	LEASED TIRES	14,836.85	
94691	2/4/2010	HAYNES SALES DBA	B&G REPAIRS & SUPPLIES	277.12	
94692	2/4/2010	H.G. MAKELIM CO.	BUS PARTS	2,269.97	
94693	2/4/2010	HILLYARD/LOS ANGELES	SHOP SUPPLIES	69.38	
94694	2/4/2010	HOME IMPROVEMENT CTR.	SHOP/B&G SUPPLIES	44.23	
94695	2/4/2010	HYDREX PEST CONTROL	FUMIGATION	70.00	
94696	2/4/2010	INTERCON TECHNOLOGIES DBA	EV/CHARGER REPAIRS	652.00	
94697	2/4/2010	JACK-X-CHANGE DBA	B&G REPAIRS & SUPPLIES	386.44	
94698	2/4/2010	KING, THOMAS	DMV REIMBURSEMENT	10.00	
94699	2/4/2010	LUBRICATION ENGINEERS, INC.	LUBRICANTS	147.95	
94700	2/4/2010	MC CORMIX CORP. (OIL)	LUBRICANTS	2,370.34	
94701	2/4/2010	MC CORMIX CORP. (GAS)	FUEL-SERVICE VEHICLES	2,026.51	
94702	2/4/2010	MCMaster-CARR SUPPLY CO.	SHOP/B&G SUPPLIES	106.99	
94703	2/4/2010	MGB INDUSTRIAL SUPPLY	BUS & SHOP SUPPLIES	67.14	
94704	2/4/2010	MISSION LINEN SUPPLY, INC	UNIFORM & LINEN SERVICE	3,326.19	
94705	2/4/2010	MOUNTAIN SPRING WATER	SHOP & OFFICE SUPPLIES	891.95	

Check #	Date	Company	Description	Amount	Voids
94706	2/4/2010	MUZICRAFT, INC	TC CONTRACT MAINTENANCE	38.00	
94707	2/4/2010	PREVOST CAR INC.- CREDIT DEPT.	BUS PARTS	3,347.40	
94708	2/4/2010	POWERSTRIDE BATTERY	EV BATTERIES	1,113.60	
94709	2/4/2010	PRESTIGE TIRE & AUTO SERVICE, I	SERVICE VEHICLE REPAIRS	34.98	
94710	2/4/2010	RAMIREZ, ANTONIO	MEDICAL REIMBURSEMENT	285.00	
94711	2/4/2010	SEELEY-RUIZ, KAREN	PAYROLL RELATED	227.07	
94712	2/4/2010	SMITH, RON	TOOL ALLOWANCE	1,100.00	
94713	2/4/2010	SM TIRE, CORP.	BUS TIRE MOUNTING	672.83	
94714	2/4/2010	SO. CAL. EDISON CO.	UTILITIES	4,620.59	
94715	2/4/2010	SPECIALTY TOOL & BOLT	SHOP SUPPLIES	54.18	
94716	2/4/2010	SB CITY OF-REFUSE/WATER	UTILITIES	1,318.79	
94717	2/4/2010	THE LIGHTHOUSE	SHOP SUPPLIES	38.13	
94718	2/4/2010	TRUCK TRAILER TRANSIT	BUS PARTS	444.95	
94719	2/4/2010	TRI-COUNTY AUTO GLASS INC	REPLACE BUS WINDOWS	440.00	
94720	2/4/2010	UPS/ UPS SCS CHICAGO	FREIGHT SHIPPING	948.92	
94721	2/4/2010	WAXIE SANITARY SUPPLY DBA	JANITORIAL SUPPLIES	148.66	
94722	2/4/2010	WAYNE'S TIRE INC.	VEHICLE TIRES	1,101.07	
94723	2/4/2010	WAYTEK INC.	BUS PARTS & SHOP SUPPLIES	347.75	
94724	2/12/2010	ROGER STEVEN ACEVES	DIRECTOR FEES	180.00	
94725	2/12/2010	AGENCIES TOOL CENTER CORP.	FAREBOX/SHOP SUPPLIES	234.63	
94726	2/12/2010	ARCHBALD & SPRAY	LEGAL COUNSEL	5,712.15	
94727	2/12/2010	AMERICAN NAMEPLATE COMPANY	ENGRAVING SERVICES	20.88	
94728	2/12/2010	SHARON ANDERSON	DIRECTOR FEES	120.00	
94729	2/12/2010	BIG BRAND TIRES	TIRES- SERVICE VEHICLE	85.88	
94730	2/12/2010	BOMAR SECURITY & INVESTIGATI	SECURITY SERVICES	816.64	
94731	2/12/2010	JOHN BRITTON	DIRECTOR FEES	180.00	
94732	2/12/2010	CALIFORNIA ELECTRIC SUPPLY, IN	SHOP/B&G SUPPLIES	193.48	
94733	2/12/2010	CARQUEST AUTO PARTS	BUS PARTS & SUPPLIES	765.91	
94734	2/12/2010	CENTRAL CITY ABS, INC.	BUS SUPPLIES	157.94	
94735	2/12/2010	CAL COAST GLASS TINT	BUS PARTS	1,229.00	
94736	2/12/2010	CERTIFIED ENVIRONMENTAL	PROFESSIONAL SERVICES	7,108.30	
94737	2/12/2010	CENTRAL COAST CIRCULATION, LL	BUS BOOK DISTRIBUTION	575.00	
94738	2/12/2010	CHILD SUPPORT ENFORCEMENT AG	PAYROLL RELATED	147.69	
94739	2/12/2010	COAST TRUCK PARTS	BUS PARTS	261.39	
94740	2/12/2010	COX COMMUNICATIONS	INTERNET & CABLE TV	212.95	
94741	2/12/2010	CROCKER REFRIGERATION & AIR	HVAC MAINTENANCE	63.03	
94742	2/12/2010	CUMMINS CAL PACIFIC LLC	BUS PARTS	177.44	
94743	2/12/2010	CUNNINGHAM'S RADIATOR DBA	REPAIR SERVICE	1,428.90	
94744	2/12/2010	DAVID D. DAVIS JR.	DIRECTOR FEES	120.00	
94745	2/12/2010	DEAILE, MARY	PAYROLL RELATED	106.15	

Check #	Date	Company	Description	Amount	Voids
94746	2/12/2010	DOCUPRODUCTS CORPORATION	COPIER COPIES & SUPPLIES	334.99	
94747	2/12/2010	DOWNTOWN ORGANIZATION, INC.	ANNUAL FEE/TC MAINT.	670.00	
94748	2/12/2010	EVERYTHING ELECTRIC	SHOP/B&G SUPPLIES	117.24	
94749	2/12/2010	FALCON FUELS, INC.	BUS FUEL	32,941.89	
94750	2/12/2010	FERRO MAGNETIC CORPORATION	BATTERY CHARGERS	2,750.00	
94751	2/12/2010	BRIAN FAHNESTOCK	DIRECTOR FEES	120.00	
94752	2/12/2010	FRAZEE INDUSTRIES, INC	BUS STOP MAINT.	106.90	
94753	2/12/2010	STATE OF CALIFORNIA	PAYROLL RELATED	515.74	
94754	2/12/2010	GIBBS INTERNATIONAL INC	BUS PARTS/SUPPLIES	1,261.73	
94755	2/12/2010	GLEASON, GARY	HEALTH/DENTAL REIMBURSEMENT	1,400.64	
94756	2/12/2010	GOODYEAR TIRE & RUBBER CO	LEASED TIRES	9,484.36	
94757	2/12/2010	GRAHAM CHEVROLET CORP.	SERVICE VEHICLE PARTS	1,045.68	
94758	2/12/2010	GRAINGER, INC.	SHOP/B&G SUPPLIES	160.43	
94759	2/12/2010	H.G. MAKELIM CO.	BUS PARTS	840.87	
94760	2/12/2010	HOME IMPROVEMENT CTR.	SHOP/B&G SUPPLIES	19.37	
94761	2/12/2010	INDOFF, INC.	OFFICE SUPPLIES	293.56	
94762	2/12/2010	UNITED STATES TREASURY - IRS	PAYROLL RELATED	500.00	
94763	2/12/2010	SHERIFF CIVIL BUREAU	PAYROLL RELATED	576.82	
94764	2/12/2010	LARA'S AUTO REPAIR DBA	BUS REPAIRS	322.94	
94765	2/12/2010	MARBORG INDUSTRIES (INC)	UTILITIES & RENTAL FEES	160.48	
94766	2/12/2010	MCGOWAN GUNTERMANN	ANNUAL AUDIT	86.00	
94767	2/12/2010	CHUCK MCQUARY	DIRECTOR FEES	180.00	
94768	2/12/2010	MIKE CUEVAS GARDENING SERVIC	LANDSCAPE MAINTENANCE SERVICE	632.00	
94769	2/12/2010	MOTOR COACH INDUSTRIES	BUS PARTS	680.21	
94770	2/12/2010	NEWARK ELECTRONICS	BUS PARTS	196.22	
94771	2/12/2010	PREVOST CAR INC.- CREDIT DEPT.	BUS PARTS	603.79	
94772	2/12/2010	PRAXAIR DISTRIBUTION, INC.	SHOP SUPPLIES	82.79	
94773	2/12/2010	REPUBLIC ELEVATOR, INC	ELEVATOR MAINTENANCE	126.28	
94774	2/12/2010	SB COUNTY FEDERAL CREDIT UNIO	PAYROLL DEDUCTION	1,448.00	
94775	2/12/2010	SANTA BARBARA NEWSPRESS	EMPLOYMENT ADS/PUBLIC NOTICES	45.76	
94776	2/12/2010	SEELEY-RUIZ, KAREN	PAYROLL RELATED	75.69	
94777	2/12/2010	SERVICE MASTER OF SANTA BARB	JANITORIAL SERV./SUPPLIES	4,952.00	
94778	2/12/2010	SMARDAN-HATCHER CO., INC	B&G REPAIRS & SUPPLIES	7.56	
94779	2/12/2010	SO. CAL. EDISON CO.	UTILITIES	1,878.74	
94780	2/12/2010	SOO HOO CUSTOMS BROKER DB	PROFESSIONAL SERVICES	425.00	
94781	2/12/2010	SPECIALTY TOOL & BOLT	SHOP SUPPLIES	266.70	
94782	2/12/2010	SUPREME AUTO CARE PROD., LLC	BUS CLEANING SUPPLIES	97.88	
94783	2/12/2010	STEWART'S DE-ROOTING & PLUMBI	PLUMBING REPAIRS	225.00	
94784	2/12/2010	THE MEDCENTER	MEDICAL EXAMS	2,101.00	
94785	2/12/2010	TILFORD WELDING	VENDOR BUS REPAIRS	20.00	

Check #	Date	Company	Description	Amount	Voids
94786	2/12/2010	TANK TEAM INC.	TANK TESTS	534.00	
94787	2/12/2010	TEAMSTERS MISC FUND	UNION MEDICAL/DENTAL	121,159.97	
94788	2/12/2010	TEAMSTERS PENSION TRUST	UNION PENSION	94,135.89	
94789	2/12/2010	TEAMSTERS UNION LOCAL NO. 186	UNION DUES	10,027.81	
94790	2/12/2010	TRUCK TRAILER TRANSIT	BUS PARTS	521.73	
94791	2/12/2010	TRI-COUNTY AUTO GLASS INC	REPLACE BUS WINDOWS	500.00	
94792	2/12/2010	TOOL DISCOUNTER.COM DBA	CLEANING SUPPLIES	3,586.98	
94793	2/12/2010	TRANSIT PRODUCTS AND SERVICES	BUS PARTS	2,024.90	
94794	2/12/2010	INTERSTATE CAPITAL CORPORATI	UNIFORMS	497.59	
94795	2/12/2010	VERIZON CALIFORNIA	TELEPHONES	1,117.27	
94796	2/12/2010	WESTERN STATES TRANSMISSIONS	BUS PARTS	6,519.56	
94797	2/12/2010	WAXIE SANITARY SUPPLY DBA	JANITORIAL SUPPLIES	765.94	
94798	2/12/2010	RICHARD WEINBERG	DIRECTOR FEES	180.00	
				431,622.55	
Current Cash Report Voided Checks:				0.00	
Prior Cash Report Voided Checks:				227.07	
Grand Total:				\$431,395.48	

**Santa Barbara Metropolitan Transit District
Cash Receipts of Accounts Receivable**

Date	Company	Description	Amount
2/2/2010	ASTI Holding Company, LLC	Overpass Property Lease - Jan10	14,000.00
2/2/2010	Calles, Gilbert & Leandra	Health Insurance - Retiree	256.54
2/2/2010	City of Goleta	Calle Real Old Towne Shuttle - Jan-Mar10	20,751.60
2/2/2010	Fountain, Melvin and Elizabeth	Health Insurance - Retiree	256.54
2/3/2010	SB County Public Health	Passes/Token Sales	2,362.50
2/3/2010	SB County Public Health	Passes/Token Sales	1,575.00
2/4/2010	Federal Transit Administration	FTA Operating Assistance - Oct-Dec09	79,593.00
2/4/2010	Sarah G. Bowman	Health Cobra	712.89
2/5/2010	Santa Barbara Airport	Advertising on Buses	4,910.00
2/8/2010	City of SB Creeks Division	Advertising on Buses	483.00
2/8/2010	Department of Rehabilitation	Passes/Token Sales	20.00
2/8/2010	Department of Rehabilitation	Passes/Token Sales	20.00
2/8/2010	Department of Rehabilitation	Passes/Token Sales	20.00
2/8/2010	Department of Rehabilitation	Passes/Token Sales	20.00
2/8/2010	Department of Rehabilitation	Passes/Token Sales	20.00
2/8/2010	Department of Rehabilitation	Passes/Token Sales	20.00
2/8/2010	Department of Rehabilitation	Passes/Token Sales	20.00
2/8/2010	UCSB - Contract Fares	Contract Fares - Jan10	95,315.04
2/8/2010	UCSB - Parking Services	Passes/Passport Sales	1,560.00
2/11/2010	City of SB - Public Works	Passes/Token Sales	750.00
2/11/2010	Godzilla Graphics	Advertising on Buses	3,611.00
2/11/2010	UCSB - Parking Services	Passes/Passport Sales	11,260.00
2/12/2010	Kara Woods Agency	Advertising on Buses	8,807.00
Total Accounts Receivable Paid During Period			\$246,344.11



BOARD OF DIRECTORS REPORT

MEETING DATE: FEBRUARY 23, 2010 **AGENDA ITEM #:** 9

TYPE: INFORMATIONAL

PREPARED BY: STEVE MAAS

Signature

REVIEWED BY: GENERAL MANAGER

GM Signature

SUBJECT: Transportation Development Act Triennial Performance Audits

RECOMMENDATION:

Receive report on the elements of a Transportation Development Act (TDA) Triennial Performance Audit.

DISCUSSION:

Triennial transportation performance audits are intended to provide an independent, objective and comprehensive review of the economy, efficiency and effectiveness of transit operators, as well as local planning agencies such as SBCAG. The Transportation Development Act (in Section 99246 of the Public Utilities Code) requires that the performance audit shall evaluate the efficiency, effectiveness, and economy of the operation of the entity being audited, and shall be conducted in accordance with the efficiency, economy, and program results portions of the Comptroller General's "Standard for Audit of Governmental Organizations, Programs, Activities, and Functions." This document defines performance auditing as follows:

"A systematic process of evaluating an organization's effectiveness, efficiency, and economy of operation under management's control and reporting to appropriate persons the results of the evaluation along with recommendations for improvements. Its objectives are to provide a means for evaluating an organization's performance and to enhance performance by making recommendations for improvements. Performance auditing requires measuring the degree of correspondence between actual performance and acceptable criteria and focuses on management's planning and control system. Both the adequacy of the system and the degree of compliance with established policies and procedures are evaluated."

The triennial transportation performance audit affords management the opportunity to periodically have an independent and objective evaluation of their organization and operations that otherwise might not be feasible, given the daily demands of

managing transportation programs and activities. The major elements of performance audits of transit operators include:

- Review of compliance requirements
- Review of prior performance audit recommendations
- Review of transit operator functions
- Review of performance indicators
 - Operating cost per passenger
 - Operating cost per revenue hour
 - Passengers per revenue hour
 - Passengers per revenue mile
 - Revenue hours per employee
 - Farebox recovery



BOARD OF DIRECTORS REPORT

AGENDA DATE: February 23, 2009
DEPARTMENT: Transit Development

AGENDA ITEM: 10

TYPE: Action

PREPARED BY: David Damiano

Signature

REVIEWED BY: General Manager

GM Signature

SUBJECT: Service Planning Criteria & Evaluation Process

RECOMMENDATION:

Staff will present the updated Service Planning Criteria & Evaluation Process and will seek approval of the updated document by the Board of Directors.

DISCUSSION:

The Service Planning & Evaluation policy was adopted by the Board of Directors in 2002. Due to the fact that the Transit District has evolved over the years it is time to update and re-title the document to meet the needs of the District in 2010.

**Santa Barbara
Metropolitan Transit District**

**SERVICE PLANNING CRITERIA
&
EVALUATION PROCESS**

Updated February 2010

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APPENDIX A – SERVICE EVALUATION

Service Planning & Evaluation Policy Executive Summary

MTD Service Planning & Evaluation Data Collection

- Qualitative Data
 - Public input
 - ✓ Passenger comments
 - ✓ E-mail and phone communications
 - ✓ Public meetings
 - ✓ Advocacy groups
 - MTD employee input
 - ✓ Drivers/supervisors/transit center staff comments
 - ✓ Staff ride-alongs
 - ✓ Time point checks
 - ✓ Schedule adherence checks
 - Local agency staff input
 - ✓ County
 - ✓ Cities
 - ✓ SBCAG
 - ✓ Other districts (e.g., SBCAG, schools)
- Quantitative Data
 - Route Analysis
 - ✓ Compare each route to the current system average and to the three-year system-wide average.
 - Service Evaluation
 - ✓ Ridership measure (riders per hour or trip)
 - ✓ Economic measure (subsidy per passenger)
 - ✓ Classified by service type
 - Origin and Destination surveys
 - ✓ Various lines as needed
 - Standard transit industry methodologies
 - ✓ Transit elasticities
 - ✓ Demographic analysis

MTD Staff Provides Recommendations to Board

- MTD Board:
 - Holds public hearing
 - Considers staff recommendations

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1. INTRODUCTION

The goal of the Santa Barbara Metropolitan Transit District (MTD) is to provide a reliable, safe, convenient and cost-effective public transit system for everyone residing within the MTD boundaries. This includes people lacking other means of transportation, such as those with limited means, students, the elderly and disabled and visitors to the area. The service is also intended to provide an attractive transportation option for commuters and shoppers who would otherwise drive automobiles.

With these many needs, it is necessary to optimize the use of the District's limited resources. Accordingly, this Policy is established for service planning and service evaluation. It provides guidelines for developing routes and schedules and presents a comprehensive way of evaluating their relative effectiveness. Further, it provides the Board of Directors with information needed to establish priorities in the allocation of district resources.

2. PURPOSE

The purpose of this document is to establish guidelines for planning new services and evaluating the effectiveness of new and existing services on an ongoing basis.

3. PLANNING GUIDELINES

Various regulations, constraints and market conditions shape the planning process. These include but are not limited to the following.

3.1 Government Agency Regulations

The MTD route planning process, as described in this document, complies with Federal Transit Administration (FTA) requirements that MTD have a written copy of a locally developed process to solicit and consider public comment before raising a fare or carrying out a major reduction of transportation services. In addition, the MTD route planning process complies with requirements of the California Transportation Development Act (TDA). Because MTD utilizes the entirety of its Local Transportation Fund apportionment for the provision of transit service, MTD is not required to hold an annual unmet transit needs hearing.

3.2 Agreements

All Agreements between MTD and other agencies are reviewed to identify any service obligations.

3.3 Budget

The Accounting Department initiates the annual process by establishing a revenue-hours budget for the operation of the system. A budget representing a revenue hour reduction from the previous year of 15 percent or greater is considered a major service reduction. A review of available equipment is conducted with the Maintenance Department; they will then advise the number of vehicles it can provide and keep in service. Based on these numbers, the Transit Development Department establishes the number of service hours to be used in constructing the schedule.

3.4 Demographic Changes

Shifts in population as a result of new residential developments and/or new commercial business parks are considered when developing service plans.

3.5 Public and Employee Input

Members of the public and MTD employees can be valuable sources of information in planning quality bus service. In order that inputs from these sources can be incorporated, proposed service changes will be communicated far enough in advance of implementation so that recommendations can be evaluated effectively. This input process will also be applied to any potential fare policy changes.

Public Input

MTD's public input process includes some or all of the following elements:

- a) *Public Meetings*: Various media will be utilized to ensure that the public is adequately informed of proposed service changes meetings. Such media include, but are not limited to, press releases, on-board flyers, at stop information holders, electronic postcards, targeted direct mail, and display advertisements. The proposed service changes shall be clearly communicated so that the public can make an educated decision as to whether or not they will participate in the input process.
- b) *Festivals/Community Events*: Information booths may be employed to distribute information about proposed service changes to provide opportunities for members of the community who may not otherwise attend public meetings to provide feedback.
- c) *Community Meetings*: MTD will present proposed service changes at select community meetings in areas that would be impacted so as to maximize the awareness of the targeted audience, such as residents, employees, seniors or students.
- d) *Office Hours*: MTD will hold office hours at a temporary site in an affected service area. Publicizing the office hours throughout the community so that residents can easily come to MTD on a drop-in basis, during scheduled hours, to learn about proposed new services and provide feedback.

- e) *Website*: MTD's website will be used to communicate upcoming service changes with an easy option to provide feedback via an email message sent to MTD.

Employee Input

MTD's employee input process includes some or all of the following elements:

- a) *Operations Meetings*: Meetings will be scheduled with Operations personnel to review proposed service changes early in the planning process so that recommendations may be assessed and implemented as appropriate. Additionally, presentations may be given at Verification of Transit Training sessions and supervisor meetings to gain input and communicate final decisions.
- b) *Employee Communications*: Proposed service changes will also be posted on the intranet and communicated via printed employee materials, such as the Employee Newsletters to provide an opportunity for employees to give feedback.
- c) *Ride Alongs*: Members of Planning and Operations will conduct ride alongs on trips to acquire firsthand knowledge about the operation.
- d) *Table Hours*: Members of Planning will establish table hours to receive input from Drivers.

Public and Employee Input Follow-up

The Planning Department will evaluate public and employee input for possible inclusion in future service changes. Following the input process and completion of service change planning, MTD shall attempt to contact the participants where practicable to thank them for their input and impart final results of the plan. Concurrently, MTD will begin implementing the approved promotion plan for the service changes (refer to Section 6, Route & Service Promotion Policy).

4. PLANNING PROCESS

The following guidelines serve as a guide to the Transit Development Department in planning new or restructured bus service.

4.1 Route Structure

- The highest priority for deployment of resources shall be those routes or markets exhibiting the highest transit demand.
- Routes shall operate bi-directionally except for service on one-way couplets and turnarounds.
- Express and Regional routes shall be designed to connect major activity centers and shall be routed via local freeways with limited stops.
- Trunk routes shall operate via major arterial roads and connect the principal areas of development in the South Coast.

- Local routes shall operate between residential neighborhoods and central business districts.
- Feeder routes shall connect lower density residential areas with Trunk, Express and Regional lines.
- Shuttle Service shall operate along short high-density corridors, connecting major traffic generators.
 - Provide circulation in lower density areas.

4.2 Directness of Route

Routes shall be designed to be as direct as possible and to provide maximum accessibility to transit. Deviations from a direct path from end-to-end of the route shall account for no more than one-tenth of the end-to-end travel time of the route.

- One way loops shall not be inserted into routes except to facilitate bus turnaround at terminal points unless there is no practicable alternative.

4.3 Minimum Service Frequency

Headways (frequency of trips) shall be based on passenger demand and budgetary considerations. New routes shall provide the minimum frequencies specified below. Existing services that cannot meet these minimum guidelines while adhering to the minimum productivity guidelines defined in Section 7 shall be identified as candidates for service changes or appropriate marketing promotion within available resources. Elimination of the route may be considered if service changes and/or promotional efforts do not improve productivity. The following table indicates the minimum frequency guideline for types of service and time of day.

Minimum Service Frequency Targets		
<u>Service Type</u>	<u>Time Frame</u>	<u>Minimum Headway</u>
Trunk + Local	Mon – Fri Peak Periods	30 Minutes
	Other hours and days	60 Minutes
Express + Regional	3 peak trips, Mon – Fri Trips should support work shift start and end times	

4.4 Days of Service

Saturday and Sunday average service shall produce at least 50 percent of the weekday passengers per hour for the same span of service.

4.5 Maximum Passenger Loads

For reasons of safety and passenger comfort, loads shall not exceed more than 30 standees in a forty-foot bus and 20 standees in a thirty-foot bus. A bus is also considered at capacity when passengers exceed the line's maximum load point.

4.6 Transfers

If transfers constitute 20 percent or more of the ridership on a line, staff shall evaluate opportunities for direct service.

4.7 Booster Service

Booster service shall be established as fixed-route bus trips specifically scheduled to prevent overcrowding of regularly scheduled service. Booster buses are also deployed when passengers are refused due to loads.

4.8 Holiday Service

Holiday service shall be either Saturday or Sunday service, depending on the degree of closures of businesses. Information regarding holiday closures shall be maintained from major employers located within the MTD route system. Holiday levels of service may also be implemented based on ridership history.

5. SCHEDULING GUIDELINES

5.1 Major Traffic Generators

The starting and ending times of major employers, universities, hospitals and schools shall be considered in developing individual line schedules.

5.2 Timed Transfers

Timed transfer connections shall be focused on designated MTD hubs at the Transit Center, State and La Cumbre, UCSB, Downtown Goleta, and Storke and Hollister. Transfer information, where possible, shall be included in the MTD schedule guide.

5.3 Recovery

Recovery is built into a schedule to protect schedule reliability. Minor additional time is inserted to allow a driver to catch up when the bus has fallen behind schedule. To minimize the possibility that passengers would be forced to sit through recovery, it shall be placed into schedules, when necessary, only at the end points of lines or at major nodes where connection time is established (such as the Transit Center or at UCSB North Hall).

5.4 Layover

Driver layover, or breaks, shall be scheduled only as contractually required or to ensure schedule reliability (to make it unnecessary for drivers to take unauthorized breaks enroute). When practicable, such layover will be established concurrent with recovery at the endpoints of lines.

5.5 Bus Allocation

Buses shall be assigned to routes according to capacity requirements and neighborhood characteristics. Subject to the limitations of efficient utilization and capacity requirements, a forty-foot bus will not be assigned to a trip that requires only a smaller vehicle. Diesel buses shall be scheduled into neighborhoods only when other alternatives are not available or feasible. Newer buses shall compose the base fleet with older buses used primarily as peak boosters. Electric vehicles are typically placed on shuttle routes while hybrid-electric buses are placed on routes with frequent starts and stops.

5.6 Relief Vehicle Allocation

Driver reliefs shall be grouped when possible to minimize relief vehicle costs. Evaluations shall be made to compare the cost of unnecessary driver pay time against the cost of deploying additional relief vehicles.

5.7 Supplemental Bus Service

Supplemental Bus Service may be provided when passenger loads cannot be adequately handled by regularly scheduled service. This type of service can be operated only if:

- Requests are received three weeks in advance of the date needed,
- The service operates along existing MTD routes.
- The anticipated number of passengers including the regular passengers exceeds the levels set in Section 4.5, Maximize Passenger Loads.
- A Supplemental Bus Service form has been approved.
- The regular fare is paid.
- The General Manager, Manager of Transit Development, and the Operations Manager must all sign off on the supplemental service request form prior to authorizing the service.

5.8 Run-Cut Parameters

- Pay hours shall not exceed scheduled revenue hours by more than 15 percent in any run cut.
- All runs will be in compliance with the union labor agreement.
- Split runs shall be used to reduce total cost.
- In order to reduce costs, all runs are cut in a way to avoid the use of premium time.

5.9 Schedule Monitoring

- Service schedules shall be monitored by utilizing the Mobile On-time Performance System (MOPS) and evaluated through regular onboard running time checks. MTD will continue to utilize the latest technologies that are available to ensure schedule adherence.
- New or revised schedules will be subject to special schedule evaluation during the first six months of operation.
- The frequency of wheelchair, bicycle and baby-stroller boardings shall be monitored to determine if schedule adjustments are required.

6. ROUTE & SERVICE PROMOTION

For the purpose of route planning, a promotional plan shall be prepared in conjunction with all route enhancements, whether new or revised, so that existing and new passengers are informed about transit services that may meet their transportation needs. The promotional plan shall identify the target audience and the marketing message.

6.1 Target Audience

Marketing personnel will be closely involved in the planning of new or revised routes and services for the purpose of identifying potential target markets.

- As new routes and services are proposed, a target audience will be clearly identified in the promotional plan.
- As existing routes are considered for revision, a target audience will be clearly identified in the new routing area.

6.2 Marketing Message

Once a target audience is identified, a marketing message is developed. The message shall be delivered through the most effective means in which to reach the target audience. The target audience may include both existing passengers and potential new riders and therefore the delivery may vary to reach both groups.

Existing Passengers

- *Media*: The following media will be used to reach this market:
 - *Routes & Schedules Guide*
 - *Line 2000 Supplement to Routes & Schedules Guide*
 - *Rider Newsletters*
 - *Interior Transit Ads*: Both inside buses and larger format inside shuttles.
 - *Flyers*: To be used as needed for specific routes that may be affected by service changes.
 - *Bus Stop Schedule Information*
 - *Press Release(s)*
 - *Newspaper Display Advertisements*
 - *Website*
 - *In addition to the above MTD personnel may be placed at busy bus stops and transfer points*
- *Distribution*: Printed promotional materials and press releases are to begin distribution no less than 4 weeks prior to a pending service change so that passengers are provided time to learn about the changes and, if necessary, adjust their travel patterns/times accordingly. Display advertisements are to hit the press much closer to, even on, the service change date for larger impression and retention value.

- MTD employees shall be provided a copy of all materials that are distributed to the public so that they are aware and knowledgeable of what the public is receiving.
- *Translation:* Spanish translation shall be provided for existing passengers, on materials such as flyers, newsletters, and interior transit ads.

Potential New Passengers

This group is to be clearly identified and will likely fall into segmented target audiences such as, residents (i.e. new housing developments), seniors, commuters, students, etc. in service area(s) affected by the new or changed route(s).

- *Media:* Based on the identified audience, following are options which may be employed:
 - *Newspaper Display Advertisements*
 - *Direct Mail Campaigns*
 - *Printed Marketing Pieces:* This may include, brochures, rack cards, etc.
 - *Radio/Television Advertisements*
 - *Movie Theater On-screen Advertisements*
 - *Press Releases/Media Interviews*
 - *Website*
 - *Brand/Logo Development:* This strategy is to be employed in the case of new route launches, as deemed appropriate.
 - *Marketing Partnerships:* Partnerships help MTD to broaden its reach by pooling the resources of other agencies and message and businesses. This strategy is to be employed as deemed appropriate and based on the target audience.
 - *Participation in Group Meetings:* As deemed appropriate based on target audience and new or changing service (e.g. a new or changing route serving senior community would warrant speaking to senior groups to educate them on the new or changing service, etc.)
 - *Public Relations Campaign:* Activities could include guest columns in publications/newspapers, speaking opportunities on local shows, at service clubs, media interviews, etc., to help communicate the service changes and diffuse any community/passenger concerns. This is separate from and more focused than an overall image campaign.
- *Distribution:* All materials targeting the potential new passenger will be distributed on or after the new service launch to promote immediate usage. MTD employees shall be provided a copy of all materials that are distributed to the public so that they are knowledgeable about what the public is receiving.

6.3 Promotional Plan Budget/Schedule

Budget

A budget is to be developed for each promotional plan associated with route planning. The budget is to clearly detail all mediums used to reach the target audience (see 6.1 above) and anticipated costs associated with each. The promotional plan budget shall be subject to approval by the General Manager prior to approval of any new route implementations or existing route revisions.

Schedule

A schedule shall be submitted with the budget, which clearly outlines when each marketing medium will reach the intended target audience.

6.4 Promotional Plan Analysis/Summary

- Upon implementation of a new or revised route, ridership will be evaluated over several months to determine the success or need for additional marketing efforts. It may be determined that a small on-board survey of the new or newly revised route should be conducted to understand how passengers learned of the service. From this survey, a further marketing effort may be developed to continue building ridership. In this case, the steps above would be employed.
- A summary report should be completed assessing which parts of the marketing message worked and which parts did not and if the appropriate target audience was identified and reached.

7. SERVICE EVALUATION

7.1 Overview

MTD continually receives requests for changes to existing service and for new service in growing areas of the District. Additionally, MTD may be operating some services that are not attracting enough riders, in this case other factors are considered in the evaluation process. In order to be consistent in the evaluation of service proposals, and to ensure that the service being provided represents the most cost-effective use of the District's resources, a set of service guidelines is maintained by MTD.

The specific guidelines, targets or minimum/maximum values for the guidelines, and a procedure for applying these guidelines, are presented in this section. Since service guidelines are intended to optimize usage of the District's resources, they are updated periodically to reflect changes in the District goals and resources.

7.2 Application of Service Guidelines

There are two primary applications for the ongoing use of the service guidelines. These are the use of guidelines to initiate the evaluation of existing services, and use of guidelines to evaluate proposals for new service.

Existing Service

The application of guidelines to existing routes is a flexible process. The purpose of the guidelines is to help identify routes which are most in need of service changes.

- Such as restructuring to eliminate lower-productivity segments or branches.
- Adjusting service frequency to better reflect the demand for service, or providing additional promotion of less patronized routes where appropriate.
- Services that do not meet guidelines are not automatically designated for elimination. Elimination of routes is only intended as a last resort, when it has been determined that no cost-effective actions are able to improve the productivity of the route.

The guidelines for evaluation of existing routes are not intended to preclude changes to routes that meet these minimum guidelines. In many cases, it may be possible to improve the productivity of services that meet the minimum guidelines by making minor changes to headways or trip times.

New Service

The evaluation of new service proposals will take place as proposals are received or needs identified. The most recent values of the guidelines for existing routes will be used to evaluate the proposed new services. New routes will be expected to meet all applicable route design guidelines described in Section 4, but will not be expected to meet the productivity guidelines described in Sections 7 or 8 until they have been in operation for at least three years.

8. FIXED ROUTE PRODUCTIVITY GUIDELINES

8.1 Derivation of Guidelines

The fixed route productivity guidelines are used to identify routes for appropriate marketing and possible revision or elimination. Separate guidelines are identified for each class of service. Routes are evaluated on both ridership (boardings per trip or per hour, depending on the class of service) and on an economic measure (MTD subsidy per passenger). Staff must evaluate and recommend action when a route falls into the least productive 25 percent of routes in both measures.

New routes should meet the applicable guidelines for their class of service after three years of operation. All new routes will be reviewed after as early as six months of operation and routes that have not shown adequate progress toward meeting the guidelines will be targeted for cost-effective actions to increase productivity or elimination.

For the purpose of applying the guidelines, types of services with similar characteristics are grouped together so that common measures can be used. Accordingly, Trunk and Local routes are grouped together, while Express and Regional services are grouped separately due to the different service characteristics between the two groups.

8.2 Ridership and Economic Measures

Ridership Measure

Because the operating characteristics of the classes of service differ, different ridership evaluation criteria are identified for the various groupings of route type, as shown in appendix A. For Trunk and Local routes, which typically have passengers boarding and alighting at all points along the route, the unit of measurement selected is “passengers per revenue hour.” For Express and Regional routes, which generally provide line-haul service between well-defined boarding and alighting areas, the unit of measurement selected is “passengers per trip”. For Shuttle routes, which typically operate on short routes at high frequencies, the unit of measurement selected is “passengers per revenue hour.”

Economic Measure

For each class of service, the economic unit of measurement selected is MTD “subsidy per passenger”. This measure combines fare and contract revenues and total cost impacts to produce a net rate that comprehensively reflects the allocation of MTD resources.

8.3 Guidelines for Evaluating Specific Trips

The guidelines for evaluating specific trips on a route varies by the time of day, with ridership guidelines for evening and night service generally lower than those for daytime service. Trips must have boardings of at least the specified percentage of the minimum boardings guidelines for the time period of the trip, as defined in the table in appendix A.

For Trunk or Local routes, the minimum boardings per trip measure are derived by multiplying the boardings per mile guideline by the length (number of miles) of the trip.

On Express and Regional routes with more than three trips and which provide only peak period service, the first and last trips should have minimum boardings of one-half the service guidelines for the class of service if the overall route meets the minimum boarding guidelines. If boardings on the first or last trips are less than 50 percent of the service guidelines, these trips may be candidates for elimination, if there is alternative local service available

9. NON-FIXED ROUTE PRODUCTIVITY GUIDELINES

MTD may in the future inaugurate non-fixed-route services (in addition to the ADA complementary paratransit service currently operated by Easy Lift Transportation), such as on-call bus service or paratransit feeder service to a fixed route. In the event that MTD plans to inaugurate such service, productivity guidelines will be developed prior to the start of the service.

10. EVENTS & SPECIAL SERVICES

Service to special events is based on the public convenience and necessity to:

- Protect neighborhoods from the impact of events which are so large as to overwhelm the surrounding supply of parking,
- Serve customers by offering adequate service for events which are predictably large enough to overload the normally available transit service, and
- Protect taxpayers by only serving those events, which have a predictable level of transit demand great enough to justify the operation of special routes.
- Introduce individuals to transit that may not normally ride the bus.

11. SPECIAL CONSIDERATIONS

11.1 Displacement

The above-mentioned productivity measures should be used as a guideline and other factors should be considered when making service adjustments. MTD will make every attempt to minimize the amount of displacement that occurs in any part of the service area when implementing service changes or reductions. As a general rule trip reduction should be considered prior to the elimination of an entire route to avoid displacement of entire neighborhoods.

11.2 Lifeline Service

There may be communities, neighborhoods or parts of the service area that MTD may choose to provide service to on the grounds of necessity or 'transit dependence' even though they do not meet the minimum thresholds set for transit service. 'Lifeline' services are considered when they specifically address the needs of those that most depend on transit or would otherwise not have access to public transit. This section applies to existing service where individuals in neighborhoods may have become dependent on transit.

11.3 Financial Considerations

The MTD allocates all of the available funding to providing transit service to the community. The guidelines outlined in this document are intended to act as a guide and exceptions may occur depending on financial considerations.

For example in years of financial growth MTD may allocate resources to service expansion. In years of reduced funding MTD may reduce service levels according to budgetary need. In some cases service reductions may occur on routes that are exceeding the adopted guidelines due to funding constraints.

12. DECISION MAKING PROCESS

MTD Board Public Hearing: Consistent with FTA guidelines, a legal notice to notify the public of the official public hearing of the MTD Board will be printed in the local newspaper. The MTD Board meeting agenda is also distributed and available to the public. The public is also notified of the MTD Board Hearing through the various media mentioned in section 3.5.

- Member of the community will be encouraged to provide input to the Board of Directors.
- In accordance with the Enabling Act of the California Public Utilities Code, § Section 95000 – 97007, the final decision on any changes will ultimately be made by the MTD Board of Directors.

APPENDIX A

Updating of Service Guidelines

The service guidelines are intended to support the goals and objectives of the District. Since these objectives and the resources available to attain them can be expected to change over time, the guidelines will be revised periodically to reflect those changes.

The numerical values of productivity guidelines shall be updated annually, using ridership, revenue and cost figures for the system-wide three-year average. The rankings are based only on those routes that existed for the entire year. Routes that were eliminated during the year will not be included because they cannot be identified as candidates for revisions. Routes that were introduced during the year will not be included in determining the new guidelines since they are not required to meet the productivity guidelines until they have been in operation for at least three years. However, these routes will be evaluated separately, using the service guidelines contained in this document.

The updating procedure will compare the values of the productivity guidelines with those in effect for the previous year. Operating cost data for the previous year will be revised to account for system-wide increases or decreases in operating cost.

Target values of the productivity guidelines included in this report are based on the system-wide three-year average (the period from July 1, 2007, to June 30, 2009). This data is presented in the table below.

2007- 2009 Three Year Average

Service Type	Performance Guidelines					
	Ridership Measures					Financial Measure
	75% 5:00 am - 6:00 am	100% 6:00 am - 8:00 pm	75% 8:00 pm - 11:00 pm	50% 11:00 pm - 12:00 am		(MTD Subsidy per Passenger)
Trunk & Local	21.6	28.7	21.6	14.4	Passengers/Rev. Hour	\$2.97
Shuttle	17.6	23.5	17.6	11.7	Passengers/Rev. Hour	\$1.06
Express	15.5	20.7	15.5	10.3	Passengers/Trip	\$3.17
Regional	13.1	17.4	13.1	8.7	Passengers/Trip	\$8.17

Source: Santa Barbara Metropolitan Transit District.

Routes that fall below the performance guidelines or are in the fourth quartile (the least productive 25 percent of all routes) will be identified for further review.

BOARD OF DIRECTORS REPORT

MEETING DATE: FEBRUARY 23, 2010 **AGENDA ITEM #:** 11

TYPE: ACTION

PREPARED BY: JERRY ESTRADA

Signature

REVIEWED BY: GENERAL MANAGER

GM Signature

SUBJECT: FISCAL YEAR 09-10 SIX-MONTH BUDGET REVISION

DISCUSSION:

The District's financial management process consists of four steps that provide management with the opportunity to make adjustments throughout the year to ensure its financial stability. Each fiscal year the process culminates with the adoption of the final operating and capital budget. An outline of the process is listed below:

- Quarterly Financial Assessments
- Six-month Budget Revision
- Draft Operating & Capital Budget
- Final Operating & Capital Budget

Of the four financial quarterly assessments conducted the six-month report is the most influential as it is used as the basis for the six-month budget revision. The revised budget is used as the baseline for the draft budget presented in early March which concludes with a final budget being adopted in early June.

Results:

As presented by staff during the previous board meeting, the District's operating revenue has dropped significantly and the trend does not appear to be changing.

Management's decision to leave two budgeted staff positions vacant along with efficient route planning and a significantly reduced marketing budget have provided some long-term offsets to the revenue deterioration.

An advantageous fixed-price diesel fuel contract has provided a great deal of the one-time savings reflected in the six-month financial assessment. However, the 12-month contract will expire in May of 2010 and staff projects that a new contract based on current fuel prices will result in increased costs between \$300 - \$500 thousand dollars. Additionally, the District completed the six-month period significantly under budget as it pertains to liability and workers compensation costs. The District is self-insured with an excess policy for both provided to limit the risk. As such, it is not prudent to assume that similar results will occur during second half of the year. Staff is cautiously optimistic that the aforementioned costs will remain low but recommends a conservative approach.

The budget revisions attached reflect the trends and projections outlined in the six-month financial assessment.

FY 09-10 Budget Revision Summary – Significant Items

Operating Revenue

- Reduce Sales Tax Revenue (TDA-LTF) by \$485,790
- Reduce Passenger Fares by \$301,595
- Reduce CMAQ Operating Assistance by \$60,700
- Reduce Non-Transportation Income by \$45,000

Operating Expense

- Reduce Driver Wage & Benefits by \$331,182
- Reduce Liability Expenses by \$85,000
- Reduce Workers Compensation Costs by \$225,000
- Reduce Fuel & Lubricants by \$134,568
- Reduce Vehicle Parts & Supplies by \$16,139
- Reduce Promotion & Information - Wage & Benefits by \$97,354
- Reduce Promotional Services by \$42,600
- Increase Fare Revenue Collection costs by \$28,659
- Increase Banking Fees (Fare Processing) by \$44,900
- Reduce Tickets & Tokens by \$25,000
- Increase Overpass Site Costs by \$37,080
- Reduce B&G Repairs by \$20,000
- Reduce District Administration Wage & Benefits by \$63,014
- Reduce Miscellaneous Services by \$22,500



***OPERATING & CAPITAL BUDGET
FISCAL YEAR 2009/2010
REVISED BUDGET***

*Santa Barbara Metropolitan Transit District
550 Olive Street * Santa Barbara, CA 93101
Telephone (805) 963-3364 * FAX (805) 962-4794
Website: sbmtd.gov * E-Mail: cservice@sbmtd.gov*

Submitted: February 23, 2010

SANTA BARBARA METROPOLITAN TRANSIT DISTRICT

**OPERATING & CAPITAL BUDGET
FISCAL YEAR 2009/2010**

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OPERATING & CAPITAL BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	\$ Change
Operating Budget			
<u>Revenue</u>			
Passenger Fares	\$8,372,190	\$8,673,785	(\$301,595)
Federal Operating Assistance	4,387,091	4,387,091	0
FTA CMAQ Operating Assistance	445,000	505,700	(60,700)
Property Tax Revenue	782,000	782,000	0
Local Operating Assistance	1,267,192	1,267,192	0
Non-Transportation Income	603,500	648,500	(45,000)
Sales Tax Revenue (TDA-LTF) Current Year	5,200,000	5,685,790	(485,790)
Total Operating Revenue	\$21,056,973	\$21,950,058	(\$893,085)
<u>Expense</u>			
Route Operations	\$12,149,185	\$12,715,911	(\$566,725)
Vehicle Maintenance	5,010,682	5,212,518	(201,836)
Passenger Accommodations	1,659,171	1,766,955	(107,784)
General Overhead	2,406,592	2,458,205	(51,613)
Total Operating Expense	\$21,225,630	\$22,153,588	(\$927,958)
<u>Required to Balance Operating Budget:</u>			
Deferred Credits (TDA - LTF) Prior Year	\$168,657	\$203,531	(\$34,873)
Capital Budget			
<u>Revenue</u>			
Sales Tax Revenue (TDA - LTF) Current Year	\$0	\$0	\$0
Other Capital Assistance	4,556,326	4,556,326	0
State Transit Assistance (TDA - STA) - Current Year	0	0	0
State Transit Assistance (TDA - STA) - Prior Year	1,650,108	1,686,508	(36,400)
Federal Capital Assistance	5,758,888	6,482,431	(723,543)
Total Capital Revenue	\$11,965,322	\$12,725,265	(\$759,943)
<u>Expense - Projects</u>			
Buses	\$9,635,009	\$10,358,552	(\$723,543)
Bus Rehab	587,600	587,600	0
Fixed Facilities	515,483	515,483	0
WIP - Calle Real Development	0	0	0
Radios & Fareboxes	475,000	475,000	0
Service Vehicles	300,000	300,000	0
Bus Stops	363,630	363,630	0
Shop Equipment	7,600	65,000	(57,400)
Management Info Systems	76,000	55,000	21,000
Office Furniture & Equipment	5,000	5,000	0
Total Capital Projects	\$11,965,322	\$12,725,265	(\$759,943)
<u>Required to Balance Capital Budget:</u>			
Deferred Credits (TDA - LTF) Prior Year	\$0	\$0	0
TOTAL OPERATING & CAPITAL	\$33,190,952	\$34,878,853	\$1,687,901
Deferred Credits Balance			
Beginning Balance	\$7,759,521	\$7,963,052	
Deferred Credits (TDA - LTF) Prior Year	(168,657)	(203,531)	
Ending Balance	\$7,590,864	\$7,759,521	

OPERATING REVENUE BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
<i>FAREBOX REVENUE</i>			
Cash Fares	\$2,931,581	\$2,349,735	\$581,846
Downtown-Waterfront Shuttle/My Ric	1,361,590	1,371,590	(10,000)
UCSB Contract Fares	974,824	927,556	47,268
SBCB Contract Fares	868,165	829,017	39,148
Carpinteria Seaside Shuttle	80,491	80,491	0
Amtrak Fares	500	225	275
Special Event Fares	100	500	(400)
Brooks Pass Program	7,909	4,000	3,909
Day Pass	1,029	2,500	(1,471)
Adult 10-Ride Passes	805,926	1,471,027	(665,101)
Student 10-Ride Passes	342,462	360,868	(18,406)
Senior/Disabled 10-Ride Passes	112,705	109,663	3,042
Valley Express 10-Ride Passes	35,802	105,000	(69,198)
Adult 30-Day Pass	518,898	653,382	(134,484)
Student 30-Day Pass	102,919	183,714	(80,795)
Senior/Disabled 30-Day Pass	201,716	169,517	32,199
Valley Express 30-Day Pass	25,574	55,000	(29,426)
<i>Subtotal</i>	<u>\$8,372,190</u>	<u>\$8,673,785</u>	<u>(\$301,595)</u>
<i>NON-TRANSPORTATION INCOME</i>			
Advertising on Buses	\$370,000	\$370,000	\$0
Interest on Investments	55,500	100,500	(45,000)
Overpass Lease & Misc	178,000	178,000	0
<i>Subtotal</i>	<u>\$603,500</u>	<u>\$648,500</u>	<u>(\$45,000)</u>
<i>SUBSIDIES</i>			
TDA Sales Tax Revenue	\$5,200,000	\$5,685,790	(\$485,790)
(Amount applied to captial)	0	0	0
FTA Formula Assistance	4,387,091	4,387,091	0
FTA CMAQ Operating Assistance	445,000	505,700	(60,700)
Property Tax Revenue	782,000	782,000	0
LOA (City of SB)	1,267,192	1,267,192	0
<i>Subtotal</i>	<u>\$12,081,283</u>	<u>\$12,627,773</u>	<u>(\$546,490)</u>
TOTAL OPERATING REVENUE	<u><u>\$21,056,973</u></u>	<u><u>\$21,950,058</u></u>	<u><u>(\$893,085)</u></u>

OPERATING EXPENSE BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
<i>ROUTE OPERATIONS</i>			
Drivers	\$9,391,101	\$9,722,283	(\$331,182)
Dispatch & Supervision	501,255	495,711	5,544
Hiring & Training	311,059	301,233	9,827
Risk & Safety	1,371,360	1,622,273	(250,913)
Transportation Subsidies	574,411	574,411	0
<i>Subtotal</i>	<u>\$12,149,185</u>	<u>\$12,715,911</u>	<u>(\$566,725)</u>
<i>VEHICLE MAINTENANCE</i>			
Mechanics	\$1,079,391	\$1,053,505	\$25,885
Cleaners & Fuelers	711,199	710,950	249
Supervision	527,326	532,089	(4,763)
Vehicle Consumables	1,780,792	1,915,360	(134,568)
Bus Parts & Supplies	815,989	832,128	(16,139)
Vendor Services	51,500	59,000	(7,500)
Risk & Safety	44,485	109,485	(65,000)
<i>Subtotal</i>	<u>\$5,010,682</u>	<u>\$5,212,518</u>	<u>(\$201,836)</u>
<i>PASSENGER ACCOMMODATIONS</i>			
Passenger Facilities	\$765,114	\$769,450	(\$4,336)
Transit Development	338,553	350,607	(12,054)
Promotion & Information	244,911	384,865	(139,954)
Fare Revenue Collection	310,592	262,032	48,559
<i>Subtotal</i>	<u>\$1,659,171</u>	<u>\$1,766,955</u>	<u>(\$107,784)</u>
<i>GENERAL OVERHEAD</i>			
Finance	\$575,490	\$578,302	-\$2,812
Personnel	100,178	100,860	(683)
Utilities & Communication	210,000	210,000	0
Operating Facilities	297,136	280,745	16,392
District Administration	1,223,788	1,288,298	(64,510)
<i>Subtotal</i>	<u>\$2,406,592</u>	<u>\$2,458,205</u>	<u>(\$51,613)</u>
TOTAL OPERATING COST	<u><u>\$21,225,630</u></u>	<u><u>\$22,153,588</u></u>	<u><u>(\$927,958)</u></u>

CAPITAL PROJECT DETAIL
FISCAL YEAR 2009/2010

<i>REVENUE VEHICLE PURCHASES</i>		
40' Hybrid Buses (7) (\$601,783)	\$4,212,486	
40' Diesel Buses (7) (\$389,562)	2,782,523	
22' Shuttles (8) (\$330,000)	<u>2,640,000</u>	
<i>Subtotal</i>		\$9,635,009
 <i>REVENUE VEHICLE IMPROVEMENTS</i>		
Diesel Fleet Drivetrains	\$312,600	
EV Drivetrain/Battery Chargers etc	<u>275,000</u>	
<i>Subtotal</i>		\$587,600
 <i>OFFICE FURNITURE & EQUIPMENT</i>		
Office Furniture Allowance	<u>\$5,000</u>	
<i>Subtotal</i>		\$5,000
 <i>MANAGEMENT INFORMATION SYSTEMS</i>		
Software Programming	\$10,000	
Mobile On-Time Performance Solution	20,000	
PC Hardware/ Major Software Upgrades	<u>46,000</u>	
<i>Subtotal</i>		\$76,000
 <i>SERVICE VEHICLES</i>		
Service Vehicle Replacements	<u>\$300,000</u>	
<i>Subtotal</i>		\$300,000
 <i>BUS STOP EQUIPMENT</i>		
Superstops	\$313,630	
Bus Stop Upgrades	<u>50,000</u>	
<i>Subtotal</i>		\$363,630
 <i>FIXED FACILITIES</i>		
Facilities	\$25,000	
Security Improvements T1	480,483	
TC Fixed Facilities	10,000	
WIP - Calle Real Development	<u>0</u>	
<i>Subtotal</i>		\$515,483
 <i>FAREBOXES & RADIOS</i>		
Fare Collection & Radio Allowance	<u>\$475,000</u>	
<i>Subtotal</i>		\$475,000
 <i>SHOP EQUIPMENT</i>		
Shop Equipment Allowance	<u>\$7,600</u>	
<i>Subtotal</i>		\$7,600
 TOTAL CAPITAL PROJECTS		 <u><u>\$11,965,322</u></u>

ROUTE OPERATIONS BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
DRIVERS			
Scheduled	\$5,716,422	\$6,075,274	(\$358,852)
Scheduled Overtime	233,144	291,381	(58,238)
Unscheduled Pay	209,099	245,699	(36,600)
Driver Lite Duty	4,496	10,789	(6,294)
FICA	533,033	565,054	(32,021)
Pension	896,679	843,657	53,022
Health	948,402	887,384	61,018
Sick Pay	128,849	128,849	0
Vacation Pay	420,588	420,588	0
Holiday Pay	230,653	188,251	42,402
Other Paid Leave	24,500	25,500	(1,000)
Unemployment Insurance	27,236	21,856	5,380
Uniforms	18,000	18,000	0
<i>Drivers Subtotal</i>	<u>\$9,391,101</u>	<u>\$9,722,283</u>	<u>(\$331,182)</u>
DISPATCH & SUPERVISION			
Supervisors	\$160,512	\$148,512	\$12,000
Staff	154,534	159,702	(5,168)
FICA	28,194	27,830	364
Pension	35,660	31,756	3,905
Health	67,718	71,415	(3,697)
Sick Pay	9,893	10,315	(422)
Vacation Pay	24,838	24,979	(141)
Holiday Pay	13,632	14,621	(989)
Other Paid Leave	5,136	5,663	(527)
Unemployment Insurance	1,138	919	219
<i>Dispatch & Supervision Subtotal</i>	<u>\$501,255</u>	<u>\$495,711</u>	<u>\$5,544</u>
HIRING & TRAINING			
Staff	\$36,500	\$36,500	\$0
Student Drivers	68,280	53,280	15,000
Existing Drivers/Supers	119,060	126,560	(7,500)
FICA	18,108	17,534	574
Pension	10,743	10,669	74
Health	20,139	18,280	1,859
Sick Pay	2,382	2,382	0
Vacation Pay	4,346	4,346	0
Holiday Pay	4,764	4,764	0
Other Paid Leave	1,374	1,374	0
Unemployment Insurance	364	294	70
Medical Exams & License Fees	22,100	22,100	0
Employment Advertising	500	1,150	(650)
Training, Travel & Meetings	2,400	2,000	400
<i>Hiring & Training Subtotal</i>	<u>\$311,059</u>	<u>\$301,233</u>	<u>\$9,827</u>

ROUTE OPERATIONS BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
RISK & SAFETY			
Wages & Benefits			
Staff	\$61,370	\$61,370	\$0
Supervisors	252,560	259,560	(7,000)
Driver Accident Pay	1,124	1,124	0
FICA	26,969	27,103	(134)
Pension	32,310	30,110	2,200
Health	42,942	49,279	(6,338)
Sick Pay	3,129	3,129	0
Vacation Pay	17,305	17,305	0
Holiday Pay	14,300	9,766	4,534
Other Paid Leave	2,749	2,038	711
Unemployment Insurance	592	478	114
Wages & Benefits Subtotal	\$455,350	\$461,263	(\$5,913)
Public Liability			
Professional Services	\$105,413	\$110,413	(\$5,000)
Insurance	282,874	282,874	0
Current Year Incident Payouts	35,000	35,000	0
Current Year Incident Reserves	50,000	50,000	0
Prior Years Incident Payouts	30,000	75,000	(45,000)
Change in Prior Years Reserves	(80,000)	(45,000)	(35,000)
Public Liability Subtotal	\$423,287	\$508,287	(\$85,000)
Workers' Compensation			
Professional Services	\$176,450	\$181,200	(\$4,750)
Insurance	41,772	37,022	4,750
Current Year Incident Payouts	45,000	85,000	(40,000)
Current Year Incident Reserves	135,000	135,000	0
Prior Years Incident Payouts	175,000	250,000	(75,000)
Change in Prior Years Reserves	(90,000)	(45,000)	(45,000)
Miscellaneous Risk & Safety	9,500	9,500	0
Workers' Compensation Subtotal	\$492,723	\$652,723	(\$160,000)
Risk & Safety Subtotal	<u>\$1,371,360</u>	<u>\$1,622,273</u>	<u>(\$250,913)</u>
TRANSPORTATION SUBSIDIES			
Dial-a-Ride (Easy Lift)	\$574,411	\$574,411	\$0
Transportation Subsidies Subtotal	<u>\$574,411</u>	<u>\$574,411</u>	<u>\$0</u>
TOTAL ROUTE OPERATIONS	<u>\$12,149,185</u>	<u>\$12,715,911</u>	<u>(\$566,725)</u>

VEHICLE MAINTENANCE BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
MECHANICS			
Mechanics	\$707,952	\$712,825	(\$4,873)
Less Mechanic Labor Capitalizati	(21,794)	(40,864)	19,070
Mechanics-OT	7,151	4,086	3,065
FICA	63,078	62,766	312
Pension	86,296	83,944	2,352
Health	97,318	97,734	(416)
Sick Pay	24,791	19,070	5,721
Vacation Pay	52,546	52,546	0
Holiday Pay	30,579	30,414	165
Other Paid Leave	1,526	1,526	0
Unemployment Insurance	2,548	2,058	490
Uniforms	12,000	12,000	0
Tool Allowance	15,400	15,400	0
<i>Mechanics Subtotal</i>	<u>\$1,079,391</u>	<u>\$1,053,505</u>	<u>\$25,885</u>
CLEANERS & FUELERS			
Service Workers	\$422,916	\$423,192	(\$276)
FICA	35,248	35,016	232
Pension	72,345	72,513	(169)
Health	117,279	119,624	(2,346)
Sick Pay	7,052	7,052	0
Vacation Pay	23,196	20,696	2,500
Holiday Pay	19,343	19,343	0
Other Paid Leave	1,288	736	552
Unemployment Insurance	2,394	1,939	455
Uniforms	7,098	7,098	0
Medical Exams & License Fees	3,040	3,740	(700)
<i>Cleaners & Fuelers Subtotal</i>	<u>\$711,199</u>	<u>\$710,950</u>	<u>\$249</u>
SUPERVISION			
Staff	\$321,338	\$321,338	\$0
FICA	27,933	27,933	0
Pension	36,513	36,513	0
Health	92,835	96,773	(3,938)
Sick Pay	2,086	2,086	0
Vacation Pay	20,856	20,856	0
Holiday Pay	13,904	13,904	0
Other Paid Leave	6,952	6,952	0
Unemployment Insurance	910	735	175
Training, Travel & Meetings	4,000	5,000	(1,000)
<i>Supervision Subtotal</i>	<u>\$527,326</u>	<u>\$532,089</u>	<u>(\$4,763)</u>

VEHICLE MAINTENANCE BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
VEHICLE CONSUMABLES			
Fuel & Lubricants	\$1,532,892	\$1,667,460	(\$134,568)
Electric Vehicle Power	82,800	82,800	0
Tire Lease	155,100	155,100	0
Tire Mounting	10,000	10,000	0
<i>Vehicle Consumables Subtotal</i>	<u>\$1,780,792</u>	<u>\$1,915,360</u>	<u>(\$134,568)</u>
VEHICLE PARTS & SUPPLIES			
Bus Parts Issued	\$727,989	\$746,128	(\$18,139)
Shop Supplies	62,500	65,000	(2,500)
Bus Servicing Supplies	13,500	13,500	0
Hazmat Disposal & Compliance	12,000	7,500	4,500
<i>Vehicle Part & Supplies Subtotal</i>	<u>\$815,989</u>	<u>\$832,128</u>	<u>(\$16,139)</u>
VENDOR BUS REPAIRS			
Vandalism Repairs	\$13,000	\$18,000	(\$5,000)
Accident Damage Repairs	7,500	13,500	(6,000)
Accident Claim Collections	(4,000)	(7,500)	3,500
Other Vendor Repairs	35,000	35,000	0
<i>Vendor Bus Repairs Subtotal</i>	<u>\$51,500</u>	<u>\$59,000</u>	<u>(\$7,500)</u>
RISK & SAFETY			
Workers' Comp Services	\$9,287	\$9,537	(\$250)
Workers' Comp Insurance	2,199	1,949	250
Current Year Incident Payouts	20,000	25,000	(5,000)
Current Year Incident Reserves	25,000	55,000	(30,000)
Prior Years Incident Payouts	38,000	38,000	0
Change in Prior Years Reserves	(50,000)	(20,000)	(30,000)
<i>Risk & Safety Subtotal</i>	<u>\$44,485</u>	<u>\$109,485</u>	<u>(\$65,000)</u>
TOTAL VEHICLE MAINTENANCE	<u><u>\$5,010,682</u></u>	<u><u>\$5,212,518</u></u>	<u><u>(\$201,836)</u></u>

PASSENGER ACCOMMODATIONS BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
PASSENGER FACILITIES			
Wages & Benefits			
Supervisors	\$173,992	\$173,992	\$0
TC Advisors	131,121	131,121	0
Staff	122,645	122,645	0
FICA	36,548	36,548	(0)
Pension	37,931	37,620	312
Health	128,443	133,483	(5,041)
Sick Pay	10,628	10,628	0
Vacation Pay	23,387	23,387	0
Holiday Pay	15,622	15,622	(0)
Other Paid Leave	2,815	2,815	0
Unemployment Insurance	2,048	1,654	394
Wages & Benefits Subtotal	\$685,178	\$689,514	(\$4,336)
Buildings & Grounds			
TC Contract Maintenance	\$53,460	\$53,460	\$0
TC Repairs/Supplies	10,000	10,000	0
Bus Stop Repairs/Supplies	14,900	14,900	0
TC Property Insurance	1,577	1,577	0
Buildings & Grounds Subtotal	\$79,936	\$79,936	\$0
Passenger Facilities Subtotal	\$765,114	\$769,450	(\$4,336)
TRANSIT DEVELOPMENT			
Staff	\$205,440	\$205,440	\$0
FICA	18,231	18,231	0
Pension	23,832	23,832	0
Health	51,127	53,286	(2,159)
Sick Pay	3,646	3,646	0
Vacation Pay	15,558	15,558	0
Holiday Pay	9,115	9,115	0
Other Paid Leave	4,558	4,558	0
Unemployment Insurance	546	441	105
Training, Travel & Meetings	1,500	1,500	0
Planning Services & Supplies	5,000	15,000	(10,000)
Transit Development Subtotal	\$338,553	\$350,607	(\$12,054)
PROMOTION & INFORMATION			
Wages & Benefits			
Staff	\$53,894	\$102,981	(\$49,087)
FICA	4,514	9,104	(4,590)
Pension	5,900	11,900	(6,000)
Health	8,816	35,468	(26,652)

PASSENGER ACCOMMODATIONS BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
Sick Pay	567	2,288	(1,721)
Vacation Pay	2,269	4,577	(2,308)
Holiday Pay	1,135	4,577	(3,442)
Other Paid Leave	1,135	4,577	(3,442)
Unemployment Insurance	182	294	(112)
Wages & Benefits Subtotal	\$78,411	\$175,765	(\$97,354)
Outside Services			
Media Ad Placement	25,000	50,000	(25,000)
Brochures & Publications	15,000	20,000	(5,000)
Promotional Giveaways	2,500	2,500	0
Bus/Shuttle Decorations	2,500	5,000	(2,500)
Other Promotions	5,500	5,000	500
Route Schedules & Information	115,000	125,600	(10,600)
Training, Travel & Meetings	1,000	1,000	0
Outside Services Subtotal	\$166,500	\$209,100	(\$42,600)
Promotion & Information Subtotal	\$244,911	\$384,865	(\$139,954)
FARE REVENUE COLLECTION			
Wages & Benefits			
Security Officer	\$109,011	\$90,367	\$18,645
FICA	9,402	7,660	1,742
Pension	12,290	10,013	2,277
Health	34,699	36,074	(1,375)
Sick Pay	2,072	1,298	774
Vacation Pay	5,358	3,398	1,960
Holiday Pay	4,327	305	4,022
Other Paid Leave	2,133	1,668	465
Unemployment Insurance	400	250	151
Wages & Benefits Subtotal	\$179,692	\$151,032	\$28,659
Outside Services			
Fare Processing	\$55,900	\$11,000	\$44,900
Farebox Parts & Repairs	50,000	50,000	0
Tickets, Tokens & Transfers	25,000	50,000	(25,000)
Outside Services Subtotal	\$130,900	\$111,000	\$19,900
Fare Revenue Collection Subtotal	\$310,592	\$262,032	\$48,559
TOTAL PSNGR ACCOMMODATIONS	\$1,659,171	\$1,766,955	(\$107,784)

GENERAL OVERHEAD BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
FINANCE			
Staff	\$337,911	\$337,911	\$0
FICA	29,791	29,791	0
Pension	38,943	38,943	0
Health	71,362	74,359	(2,998)
Sick Pay	3,102	3,102	0
Vacation Pay	28,154	28,154	0
Holiday Pay	15,508	15,508	0
Other Paid Leave	7,754	7,754	0
Unemployment Insurance	965	779	186
Financial Audit Services	42,000	42,000	0
<i>Finance Subtotal</i>	<u>\$575,490</u>	<u>\$578,302</u>	<u>(\$2,812)</u>
PERSONNEL			
Staff	\$61,428	\$61,428	\$0
FICA	5,400	5,400	0
Pension	7,059	7,059	0
Health	16,945	17,663	(718)
Sick Pay	2,022	2,022	0
Vacation Pay	3,907	3,907	0
Holiday Pay	2,696	2,696	0
Other Paid Leave	539	539	0
Unemployment Insurance	182	147	35
<i>Personnel Subtotal</i>	<u>\$100,178</u>	<u>\$100,860</u>	<u>(\$683)</u>
UTILITIES			
Telephone & Data Communications	\$50,000	\$50,000	\$0
Power, Water & Refuse	135,000	135,000	0
Two-Way Radios	25,000	25,000	0
<i>Utilities Subtotal</i>	<u>\$210,000</u>	<u>\$210,000</u>	<u>\$0</u>
OPERATING FACILITIES			
Wages & Benefits			
Staff	\$40,138	\$40,138	\$0
FICA	3,397	3,397	0
Pension	4,441	4,441	0
Health	16,916	17,640	(723)
Sick Pay	683	683	0
Vacation Pay	1,708	1,708	0
Holiday Pay	1,708	1,708	0
Other Paid Leave	171	171	0
Unemployment Insurance	182	147	35
<i>Wages & Benefits Subtotal</i>	<u>\$69,344</u>	<u>\$70,033</u>	<u>(\$688)</u>
OPERATING FACILITIES (cont'd)			
Service Vehicles			

GENERAL OVERHEAD BUDGET
FISCAL YEAR 2009/2010

	Revised Budget FY 09/10	Original Budget FY 09/10	Change
Parts & Repairs	\$18,000	\$18,000	\$0
Fuel	49,200	49,200	0
Service Vehicles Subtotal	\$67,200	\$67,200	\$0
Buildings & Grounds			
Contract Maintenance	\$61,400	\$61,400	\$0
Overpass Site	45,000	7,920	37,080
B&G Repairs/Supplies	40,000	60,000	(20,000)
Property Insurance	14,192	14,192	0
Buildings & Grounds Subtotal	<u>\$160,592</u>	<u>\$143,512</u>	<u>\$17,080</u>
<i>Operating Facilities Subtotal</i>	<u>\$297,136</u>	<u>\$280,745</u>	<u>\$16,392</u>
DISTRICT ADMINISTRATION			
Wages & Benefits			
Staff	\$405,401	\$436,660	(\$31,260)
Bus Ad Revenue Placement	6,160	6,160	0
FICA	36,368	39,042	(2,674)
Pension	47,540	51,036	(3,496)
Health	88,522	122,629	(34,107)
Sick Pay	7,839	7,096	743
Vacation Pay	43,625	40,751	2,874
Holiday Pay	23,265	19,695	3,571
Other Paid Leave	7,270	6,155	1,116
Unemployment Insurance	1,138	919	219
Wages & Benefits Subtotal	\$667,128	\$730,142	(\$63,014)
Administrative Services			
Directors Fees	\$16,800	\$16,800	\$0
Public Officials Insurance	24,375	24,375	0
Legal Counsel	60,000	60,000	0
Pension Administration	10,900	10,900	0
Office Equipment Maintenance	98,648	85,644	13,004
Miscellaneous Services	97,140	119,640	(22,500)
Office & Computer Supplies	53,000	55,000	(2,000)
Dues & Subscriptions	36,075	36,075	0
Conferences, Meetings & Training	5,000	5,000	0
Employee Relations	13,000	13,000	0
Retiree Health Insurance	99,022	99,022	0
Mandated Fees & Permits	27,700	17,700	10,000
Bus Ad Revenue Program	1,500	1,500	0
Miscellaneous	13,500	13,500	0
Environmental Cleanup Costs	0	0	0
Administrative Services Subtotal	<u>\$556,660</u>	<u>\$558,156</u>	<u>(\$1,496)</u>
<i>District Administration Subtotal</i>	<u>\$1,223,788</u>	<u>\$1,288,298</u>	<u>(\$64,510)</u>
TOTAL GENERAL OVERHEAD	<u><u>\$2,406,592</u></u>	<u><u>\$2,458,205</u></u>	<u><u>(\$51,613)</u></u>

MTD Report to Santa Barbara on City-Assisted Services

**Monthly Report
January 2010**

Prepared by the

Santa Barbara Metropolitan Transit District



February 12, 2010

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MTD Report to Santa Barbara on City-Assisted Services January 2010 Monthly Report

The City of Santa Barbara provides funding to the Santa Barbara Metropolitan Transit District (MTD) to assist in supporting several MTD bus routes. This report, prepared pursuant to Agreements No. 22,278.1 and No. 23,135, provides the City with data regarding MTD shuttle services in Santa Barbara, MTD South Coast Transit Priorities routes supported by the City, and core MTD routes assisted by the City through the Enhanced Transit Program.

Table 1 presents the ridership of each City-assisted MTD route for January 2010 and for fiscal year (FY) 2010 to date. (The MTD fiscal year runs from July 1 through June 30.) The table also presents ridership for the corresponding periods of the previous fiscal year, as well as the percent change in ridership over the previous year. January 2010 had 19 weekday service days and 12 weekend service days, and January 2009 had 20 weekday service days and 11 weekend service days.

TABLE 1
MTD Routes Assisted by Santa Barbara - Ridership

Line	Current Month		Fiscal Year to Date		Percent Change	
	FY 2010 Jan 2010	FY 2009 Jan 2009	FY 2010 Jul-Jan	FY 2009 Jul-Jan	Current Month	FY To Date
Shuttle Services						
DWE - State Street	27,172	28,500	259,534	272,369	-4.7%	-4.7%
DWE - East Beach	3,314	3,440	48,796	50,023	-3.7%	-2.5%
DWE - West Beach	1,666	1,587	20,513	20,345	5.0%	0.8%
<i>Downtown-Waterfront Total</i>	<i>32,152</i>	<i>33,527</i>	<i>328,843</i>	<i>342,737</i>	<i>-4.1%</i>	<i>-4.1%</i>
Carrillo Commuter Lot	1,490	1,473	11,516	11,592	1.2%	-0.7%
South Coast Transit Priorities						
Crosstown Shuttle	9,902	11,342	92,599	88,090	-12.7%	5.1%
4 - Mesa/SBCC	8,999	9,853	87,640	82,777	-8.7%	5.9%
Enhanced Transit Program						
1 - Westside	38,142	39,103	289,510	326,277	-2.5%	-11.3%
2 - Eastside	54,334	60,040	423,497	457,664	-9.5%	-7.5%
<i>Lines 1 & 2 Total</i>	<i>92,476</i>	<i>99,143</i>	<i>713,007</i>	<i>783,941</i>	<i>-6.7%</i>	<i>-9.0%</i>
6 - State/Hollister/Goleta	61,546	68,240	473,258	503,137	-9.8%	-5.9%
11 - State/Hollister/UCSB	81,413	80,839	585,115	625,031	0.7%	-6.4%
<i>Lines 6 & 11 Total</i>	<i>142,959</i>	<i>149,079</i>	<i>1,058,373</i>	<i>1,128,168</i>	<i>-4.1%</i>	<i>-6.2%</i>
3 - Oak Park	22,875	30,352	192,261	210,281	-24.6%	-8.6%

Source: Santa Barbara Metropolitan Transit District.

There are several factors that have contributed to an overall decrease in travel in recent months when compared to the same month of the previous year. These include: the depressed economy, which has led to a reduction both in commute trips and other trips; decreased tourism to the area; MTD's January 2009 fare increase; the decreased price of gasoline; and an increase in the use of various measures such as carpooling, flex schedules, and compressed workweeks.

MTD experienced a significant ridership spike during much of FY 2009, due to the increased cost of gasoline at that time. With the decreased fuel prices that have followed, as well as the other factors mentioned above, MTD ridership has returned to more typical rates. This can be seen in an examination of MTD's five-year ridership trend.

Table 2 shows the number of revenue hours that MTD operated on each City-assisted route in January 2010 and for fiscal year 2010 to date, along with corresponding data from the previous fiscal year for comparison. The table also presents ridership per revenue hour for each route for the current month and the corresponding month of the previous fiscal year.

TABLE 2
MTD Routes Assisted by Santa Barbara - Revenue Hours

Line	Current Month		Fiscal Year to Date		Riders per Hour	
	FY 2010 Jan 2010	FY 2009 Jan 2009	FY 2010 Jul-Jan	FY 2009 Jul-Jan	FY 2010 Jan 2010	FY 2009 Jan 2009
Shuttle Services						
DWE - State Street	907	887	6,869	6,766	30.0	32.1
DWE - East Beach	165	165	1,586	1,550	20.1	20.8
DWE - West Beach	83	83	754	737	20.1	19.1
<i>Downtown-Waterfront Total</i>	<i>1,155</i>	<i>1,135</i>	<i>9,209</i>	<i>9,053</i>	<i>27.8</i>	<i>29.5</i>
Carrillo Commuter Lot	95	106	728	712	15.7	13.9
South Coast Transit Priorities						
Crosstown Shuttle	555	584	4,263	4,278	17.8	19.4
4 - Mesa/SBCC	318	335	2,442	2,365	28.3	29.4
Enhanced Transit Program						
1 - Westside	791	814	5,689	5,682	48.2	48.0
2 - Eastside	1,324	1,364	9,595	9,584	41.0	44.0
<i>Lines 1 & 2 Total</i>	<i>2,115</i>	<i>2,178</i>	<i>15,284</i>	<i>15,266</i>	<i>43.7</i>	<i>45.5</i>
6 - State/Hollister/Goleta	1,538	1,547	10,677	10,672	40.0	44.1
11 - State/Hollister/UCSB	1,982	2,013	13,898	13,986	41.1	40.2
<i>Lines 6 & 11 Total</i>	<i>3,520</i>	<i>3,560</i>	<i>24,575</i>	<i>24,658</i>	<i>40.6</i>	<i>41.9</i>
3 - Oak Park	910	940	6,696	6,696	25.1	32.3

Source: Santa Barbara Metropolitan Transit District.

SHUTTLE SERVICES

The City provides a fare-buydown subsidy to MTD for clean and quiet 22-ft. electric shuttle services to meet downtown Santa Barbara traffic-reduction goals.

- *Downtown-Waterfront Shuttle.* The Downtown service operates along State Street from Sola Street to Cabrillo Boulevard, and the Waterfront service operates along Cabrillo Boulevard from the harbor to the zoo. The one-way fare is \$0.25. Transfers between State Street and the Waterfront are free.
- *Carrillo Lot Shuttle.* Weekday peak-period service subsidized by the City as an incentive to attract downtown employees to park in the Carrillo commuter lot. The service is free for commuter lot parkers and \$0.25 for other riders.

Downtown-Waterfront Shuttle

As shown in Table 1, total ridership on the Downtown-Waterfront Shuttle decreased from 33,527 passengers in January 2009 to 32,152 in January 2010. Ridership decreased on both State Street and on the Waterfront. Table 2 shows that total revenue hours operated on the Downtown-Waterfront Shuttle increased from 1,135 in January 2009 to 1,155 in January 2010, due to one additional weekend service day in January 2010. Riders per hour decreased 32.1 in January 2009 to 30.0 in January 2010. The service generated \$7,343.50 in fare revenue in January 2009, and decreased to \$6,936.25 in January 2010.

Downtown-Waterfront Shuttle Ten-Year Trend

Tables 3A, 3B, and 3C present ten-year combined Downtown-Waterfront Shuttle trends in ridership, revenue hours, and passengers per revenue hour, respectively. The tables show that, over the entire ten-year period, annual ridership has decreased while annual revenue hours have remained relatively constant. However, the most recent several years have shown less variation in ridership.

The primary market for the Downtown-Waterfront Shuttle differs from that for a typical public transportation service. In general terms, the primary market for this shuttle service is tourists and local residents who are shopping, dining, sightseeing, or enjoying other recreational activities downtown and on the waterfront. Thus, shuttle ridership is heavily dependent on the convenience of the service and on the number of persons spending leisure time in these areas. Some factors affecting ridership on the service are discussed below.

Traffic Congestion

The time required to complete a trip on the Downtown-Waterfront Shuttle has increased over time as traffic congestion has worsened. A round trip on the State Street portion of the service (i.e., from the Dolphin Fountain to Sola Street and back to the Dolphin Fountain), for example, formerly required from 30 to 35 minutes, depending on the season and the time of day. Now, a round trip requires up to 45 minutes at peak times.

TABLE 3A: Downtown-Waterfront Shuttle Ridership

Month	Fiscal Year										
	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Jul.	102,746	97,492	95,727	72,007	78,586	73,895	76,499	73,310	75,727	77,887	78,777
Aug.	97,141	93,566	81,304	72,465	79,726	70,693	71,631	66,978	70,257	82,138	71,549
Sep.	64,788	69,886	57,988	47,600	47,203	48,519	45,410	47,491	45,967	46,286	48,034
Oct.	60,600	53,163	37,818	40,072	45,430	38,690	38,797	36,864	39,422	41,480	37,068
Nov.	48,765	39,560	30,165	36,240	35,899	32,307	34,528	32,350	33,210	33,044	32,677
Dec.	51,678	46,700	31,026	33,443	31,832	30,376	31,672	30,473	30,298	28,375	28,586
Jan.	44,209	44,252	28,609	38,051	36,212	28,900	33,439	30,698	28,370	33,527	32,152
Feb.	44,036	29,607	29,717	34,602	33,550	28,036	34,767	30,898	30,575	27,233	
Mar.	52,424	44,327	32,001	43,923	40,149	36,855	34,067	35,999	41,274	34,380	
Apr.	64,209	54,134	32,374	41,452	40,536	38,369	37,411	37,436	38,653	40,821	
May	60,669	52,654	37,358	43,085	43,982	44,240	42,861	43,587	43,347	44,631	
Jun.	65,894	70,601	50,499	56,228	53,482	59,501	55,301	59,194	63,083	54,150	
Total	757,159	695,942	544,586	559,168	566,587	530,381	536,383	525,278	540,183	543,952	

TABLE 3B: Downtown-Waterfront Shuttle Revenue Hours

Month	Fiscal Year										
	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Jul.	1,696	1,720	1,838	1,777	1,786	1,754	1,786	1,586	1,682	1,785	1,791
Aug.	1,605	1,646	1,807	1,772	1,801	1,704	1,702	1,615	1,673	1,806	1,765
Sep.	1,338	1,312	1,192	1,279	1,227	1,225	1,214	1,173	1,192	1,086	1,237
Oct.	1,280	1,214	1,104	1,254	1,235	1,137	1,139	1,114	1,122	1,093	1,114
Nov.	1,090	1,098	973	1,128	1,114	1,062	1,058	1,042	1,070	1,072	1,064
Dec.	1,261	1,427	1,141	1,150	1,123	1,084	1,082	1,067	1,105	1,076	1,081
Jan.	1,128	1,130	1,018	1,168	1,176	1,146	1,140	1,119	1,128	1,135	1,155
Feb.	1,110	1,085	994	1,062	1,102	1,026	1,035	1,011	1,043	1,013	
Mar.	1,108	1,145	1,028	1,176	1,128	1,119	1,126	1,113	1,121	1,109	
Apr.	1,192	1,324	1,067	1,182	1,060	1,093	1,109	1,079	1,062	1,065	
May	1,268	1,589	1,181	1,349	1,190	1,227	1,193	1,234	1,297	1,342	
Jun.	1,391	1,638	1,456	1,520	1,655	1,646	1,432	1,685	1,705	1,715	
Total	15,467	16,328	14,799	15,817	15,597	15,223	15,016	14,838	15,200	15,297	

TABLE 3C: Downtown-Waterfront Shuttle Passengers per Hour

Month	Fiscal Year										
	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Jul.	60.6	56.7	52.1	40.5	44.0	42.1	42.8	46.2	45.0	43.6	44.0
Aug.	60.5	56.8	45.0	40.9	44.3	41.5	42.1	41.5	42.0	45.5	40.5
Sep.	48.4	53.3	48.6	37.2	38.5	39.6	37.4	40.5	38.6	42.6	38.8
Oct.	47.3	43.8	34.3	32.0	36.8	34.0	34.1	33.1	35.1	38.0	33.3
Nov.	44.7	36.0	31.0	32.1	32.2	30.4	32.6	31.0	31.0	30.8	30.7
Dec.	41.0	32.7	27.2	29.1	28.3	28.0	29.3	28.6	27.4	26.4	26.4
Jan.	39.2	39.2	28.1	32.6	30.8	25.2	29.3	27.4	25.2	29.5	27.8
Feb.	39.7	27.3	29.9	32.6	30.4	27.3	33.6	30.6	29.3	26.9	
Mar.	47.3	38.7	31.1	37.3	35.6	32.9	30.3	32.3	36.8	31.0	
Apr.	53.9	40.9	30.3	35.1	38.2	35.1	33.7	34.7	36.4	38.3	
May	47.8	33.1	31.6	31.9	37.0	36.1	35.9	35.3	33.4	33.3	
Jun.	47.4	43.1	34.7	37.0	32.3	36.1	38.6	35.1	37.0	31.6	
Avg.	49.0	42.6	36.8	35.4	36.3	34.8	35.7	35.4	35.5	35.6	

Source: Santa Barbara Metropolitan Transit District.

Because MTD operates the same number of vehicles and approximately the same number of revenue hours annually, the number of trips provided during a typical day has decreased due to the increase in congestion and in the time required for each trip. *Thus, over the ten-year period, the travel time has increased and the frequency of service has decreased.* These factors make the service less appealing, and undoubtedly account for some of the decrease in riders over time.

Service Disruptions due to State Street Pedestrian Improvements

Between 1999 and 2007, the City Redevelopment Agency installed new brick sidewalks, updated street furniture, and enhanced landscaping on State Street between Gutierrez and Victoria Streets. These improvements, which were constructed in four phases, improved pedestrian amenities and helped to revitalize the State Street corridor. However, closures of portions of State Street during construction of the improvements required the Downtown-Waterfront Shuttle to detour to Chapala and Anacapa Streets. The State Street service was much less convenient during these detours, which likely contributed to the general decrease in ridership during the 10-year period.

Tourism

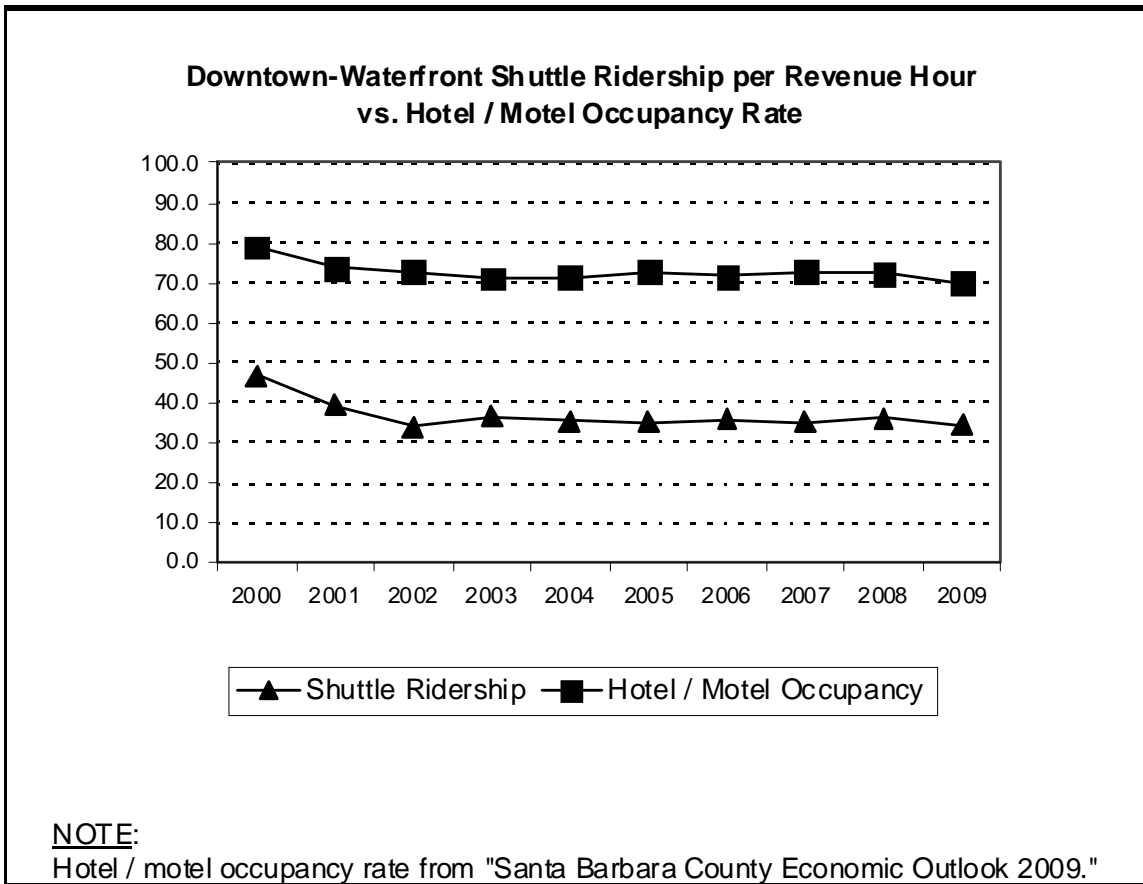
The Downtown-Waterfront Shuttle (DWE) is quite popular with tourists, and a change in the number of visitors to Santa Barbara's downtown and waterfront areas has a major impact on ridership. Annual lodging occupancy rates, shown in Figure 1, are a good indicator of annual changes in the number of tourists visiting the area.

The figure presents average annual hotel / motel occupancy rates for the period from 2000 to 2009 from the *Santa Barbara County Economic Outlook 2009* (Table 20, p. 441), and average annual Downtown-Waterfront Shuttle ridership per revenue hour for the same period. (In order to match the occupancy data, shuttle ridership and revenue hour data used to calculate ridership per hour for this discussion are for calendar years rather than fiscal years.)

As the figure shows, the two measures have similar trend lines. By far the greatest decrease in both ridership and hotel / motel occupancy occurred between 2000 and 2002, following the terrorist attacks of September 11, 2001. A comparison of month-by-month ridership (Table 3A) reveals that for 12 of the 13 months beginning September 2001, ridership significantly decreased compared to the same month of the previous year. Neither the lodging occupancy rate nor shuttle ridership has returned to pre-9/11 levels.

The factors discussed above (increased traffic congestion, service disruptions, and decreased tourism) have undoubtedly contributed to the general decrease in ridership on the Downtown-Waterfront Shuttle over the ten-year period. MTD staff will continue marketing efforts to increase ridership.

FIGURE 1
Calendar Years 2000 Through 2009
Shuttle Ridership & Hotel / Motel Occupancy



Source: Santa Barbara Metropolitan Transit District.

Downtown-Waterfront Shuttle Marketing & Public Information

- Passenger information cards with detachable perforated pocket-sized schedules are distributed at 36 locations along the route, including lodging establishments and the Visitors' Center.
- The shuttle route is featured in all "Santa Barbara Car Free" collateral. Flyers are available on all Amtrak Surfliner trains.
- The "Santa Barbara Car Free" brochure for the MTD's Line 22 service to "Santa Barbara's Highlights" features the Downtown-Waterfront Shuttle as a connection from the beach to Line 22.
- The Downtown-Waterfront Shuttle route is featured on the map in the explore section of Santa Barbara Seasons magazine.
- Partnership website links are provided by "Santa Barbara Car Free," Amtrak, the Santa Barbara Conference & Visitors Bureau and Film Commission, and the Downtown Organization.
- The Downtown-Waterfront Shuttle route is featured in the "Cultural Arts" brochure produced by the Downtown Organization.

- MTD is an active member of the Santa Barbara Conference & Visitors Bureau and Film Commission, the Santa Barbara Downtown Organization, and the Santa Barbara Region Chamber of Commerce, and works with these organizations to publicize the shuttle.
- All Downtown-Waterfront Shuttle vehicles display City of Santa Barbara seals.
- Amtrak passengers can request two free MTD transfers from the conductor. Caltrans pays MTD for the transfers after they are used.

Carrillo Commuter Lot Shuttle

The Carrillo Lot Shuttle operates on weekday service days only, and operated on 19 days in January 2010 and 20 days in January 2009. As shown in Table 1, ridership increased slightly, from 1,473 passengers in January 2009 to 1,490 in January 2010. Revenue hours decreased in January 2010, due to one fewer day of operation. This resulted in an increase in the number of passengers per revenue hour from 13.9 in January 2009 to 15.7 in January 2010.

The Carrillo commuter parking lot is generally not filled to capacity. MTD staff will continue to monitor the performance of the service and will continue discussions with City Parking staff regarding the monthly variability in ridership.

SOUTH COAST TRANSIT PRIORITIES

MTD implemented two new routes within the City of Santa Barbara as part of the South Coast Transit Priorities (SCTP) project:

- *Crosstown Shuttle*. Utilizes clean and quiet 22-ft. electric shuttles to connect the Eastside via Cota Street and the Westside via Micheltorena Street with downtown Santa Barbara. Also serves the Cota Commuter Lot.
- *Line 4 – Mesa/SBCC (formerly called Mesa Loop)*. Utilizes biodiesel in clean-burning 29-ft. buses to connect downtown Santa Barbara and the Mesa via Carrillo Street and Cliff Drive. Also serves Santa Barbara City College.

The SCTP project was initially funded with a federal Congestion Mitigation and Air Quality Improvement (CMAQ) grant awarded to MTD. The CMAQ funds for the two routes are fully expended, and the City is currently subsidizing the operation of both the Crosstown Shuttle and Line 4. The City has also provided MTD with capital assistance for new buses for Line 4, and has agreed to provide capital assistance for the Crosstown Shuttle.

Beginning in May 2007, MTD uses a biodiesel blend in all diesel-powered buses. Biodiesel is a renewable fuel manufactured from vegetable oils, animal fats, or recycled cooking oils. There are a number of benefits from the use of biodiesel, including reduced dependence on imported oil, improved engine lubricity, and reductions in particulate matter, hydrocarbon, carbon monoxide, and greenhouse gas emissions.

Crosstown Shuttle

Following implementation of the Enhanced Transit Program in March 2007 (described below), Crosstown Shuttle ridership decreased compared to the previous year. This was to be expected, as the Crosstown Shuttle is a complementary service to Lines 1 & 2 and the enhanced peak-period service on those lines attracted some riders that previously rode this service.

Table 1 shows that ridership on the Crosstown Shuttle decreased from 11,342 riders in January 2009 to 9,902 riders in January 2010. The Crosstown Shuttle operates on weekday service days only, and operated on 19 days in January 2010 and 20 days in January 2009.

In recent years, MTD increased the number of revenue hours operated on the Crosstown Shuttle to compensate for the additional time needed to complete a trip due to increased traffic congestion. Although the additional revenue hours increased the cost to MTD, MTD does not bill the City for the additional hours.

As is shown in Table 2, Crosstown Shuttle revenue hours decreased from 584 in January 2009 to 555 in January 2010, due to one fewer day of operation. The average number of passengers per hour decreased from 19.4 in January 2009 to 17.8 in January 2010.

Tables 4A, 4B, and 4C present monthly ridership, revenue hours, and passengers per hour for the Crosstown Shuttle since the implementation of the service in late July 2001.

Line 4 - Mesa/SBCC

This route was called the Mesa Loop until a reconfiguration and name change in August 2008. MTD implemented Line 4 as a stand-alone route in March 2007. (MTD implemented a small-scale version of the service in September 2003, incorporated into Line 5, which provided a limited number of short "express" Line 5 weekday peak period trips between downtown and the Mesa.)

Line 4 also operates on weekday service days only, and operated on 19 days in January 2010 and 20 days in January 2009. Ridership decreased from 9,853 passengers in January 2009 to 8,999 in January 2010.

The number of revenue hours decreased from 335 hours in January 2009 to 318 in January 2010. The route carried an average of 29.4 riders per revenue hour in January 2009, and decreased to 28.3 passengers per hour in January 2010.

TABLE 4A: Crosstown Shuttle Ridership

Month	Fiscal Year								
	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Jul.	155	11,614	13,591	13,156	12,944	14,188	13,883	12,878	14,952
Aug.	3,542	11,536	13,420	13,103	14,749	16,169	15,382	12,776	13,291
Sep.	3,800	11,649	14,531	13,978	14,273	13,907	12,247	13,694	14,836
Oct.	5,089	13,795	14,958	14,538	14,152	15,911	14,801	15,117	16,042
Nov.	3,968	11,355	11,088	14,459	13,648	13,625	12,657	10,344	12,607
Dec.	4,490	11,469	12,387	13,286	13,301	12,086	10,298	11,939	10,969
Jan.	7,389	12,626	12,123	13,078	13,367	13,231	11,125	11,342	9,902
Feb.	7,899	11,712	11,347	13,084	12,930	12,503	11,496	11,355	
Mar.	9,544	13,514	13,229	16,241	14,662	14,369	12,457	13,669	
Apr.	10,579	14,228	13,030	14,508	12,727	13,312	13,457	13,557	
May	11,644	14,440	12,532	15,330	15,169	15,052	13,212	12,956	
Jun.	9,947	13,219	12,137	14,788	15,378	13,651	12,271	13,228	
Total	78,046	151,157	154,373	169,549	167,300	168,004	153,286	152,855	

TABLE 4B: Crosstown Shuttle Revenue Hours

Month	Fiscal Year								
	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Jul.	47	538	536	536	488	557	595	649	672
Aug.	541	538	512	537	567	647	658	618	611
Sep.	448	488	512	512	559	591	561	615	614
Oct.	561	561	561	512	560	649	679	672	643
Nov.	511	463	439	488	533	591	590	526	555
Dec.	526	512	536	536	586	587	591	614	614
Jan.	593	536	512	488	559	620	620	584	555
Feb.	489	463	463	463	506	561	590	555	
Mar.	512	512	561	561	613	649	621	643	
Apr.	537	537	536	512	535	620	649	643	
May	536	512	488	512	588	650	620	584	
Jun.	489	513	537	538	589	620	619	643	
Total	5,790	6,173	6,193	6,195	6,683	7,342	7,393	7,346	

TABLE 4C: Crosstown Shuttle Passengers per Hour

Month	Fiscal Year								
	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Jul.	3.3	21.6	25.4	24.5	26.5	25.5	23.3	19.8	22.3
Aug.	6.5	21.4	26.2	24.4	26.0	25.0	23.4	20.7	21.8
Sep.	8.5	23.9	28.4	27.3	25.5	23.5	21.8	22.3	24.2
Oct.	9.1	24.6	26.7	28.4	25.3	24.5	21.8	22.5	24.9
Nov.	7.8	24.5	25.3	29.6	25.6	23.1	21.5	19.7	22.7
Dec.	8.5	22.4	23.1	24.8	22.7	20.6	17.4	19.4	17.9
Jan.	12.5	23.6	23.7	26.8	23.9	21.3	17.9	19.4	17.8
Feb.	16.2	25.3	24.5	28.3	25.6	22.3	19.5	20.5	
Mar.	18.6	26.4	23.6	29.0	23.9	22.1	20.1	21.3	
Apr.	19.7	26.5	24.3	28.3	23.8	21.5	20.7	21.1	
May	21.7	28.2	25.7	29.9	25.8	23.2	21.3	22.2	
Jun.	20.3	25.8	22.6	27.5	26.1	22.0	19.8	20.6	
Avg.	13.5	24.5	24.9	27.4	25.0	22.9	20.7	20.8	

Source: Santa Barbara Metropolitan Transit District.

ENHANCED TRANSIT PROGRAM

During ongoing service evaluations, MTD staff identified various routes with a number of trips that were carrying excessive passenger loads. Bus drivers on these routes were often forced to leave passengers at bus stops because the bus was too full to safely board additional passengers. Beginning in March 2007, the City assisted MTD with funding to enhance service on several core MTD routes to alleviate these overloads:

- *Line 1 - Westside & Line 2 - Eastside.* Utilizes a biodiesel blend in clean-burning 40-ft. buses for enhanced weekday peak-period service to downtown Santa Barbara. Line 1 connects the upper Westside to the San Andres corridor, west Carrillo Street, and downtown. Line 2 connects the lower Eastside to the Milpas Street corridor, east Anapamu Street, and downtown.
- *Line 6 - Goleta & Line 11 - UCSB.* Utilizes a biodiesel blend in clean-burning 40-ft. buses for enhanced weekday peak-period service from downtown Santa Barbara to Upper State Street, the Eastern Goleta Valley, the City of Goleta, and the University of California at Santa Barbara (UCSB). Many of the buses on these routes are hybrid diesel-electric buses. Both routes follow State Street and Hollister Avenue from downtown Santa Barbara to Fairview Avenue. Line 6 continues along Hollister Avenue to Camino Real Marketplace, while Line 11 turns south on Fairview Avenue and travels to the airport and UCSB. (Santa Barbara County, Goleta, and UCSB also provide financial assistance to MTD for the Lines 6 & 11 enhancement.)
- *Line 3 - Oak Park.* Utilizes a biodiesel blend in clean-burning 29-ft. buses for enhanced weekday service connecting downtown Santa Barbara to Santa Barbara Cottage Hospital, upper State Street, and La Cumbre Plaza, via Bath and Castillo Streets, the Samarkand area, and Las Positas Road.

Line 1 - Westside & Line 2 - Eastside

Lines 1 & 2 were enhanced to provide service every 10 minutes during weekday morning and afternoon peak periods (compared to the previous schedule of every 15 minutes). As shown in Table 1, total combined ridership on Lines 1 & 2 decreased from 99,143 passengers in January 2009 to 92,476 in January 2010. When compared to the January before implementation of the Enhanced Transit Program, Lines 1 & 2 continue to show a significant increase in average daily total and peak period ridership.

Table 2 shows that combined Lines 1 & 2 revenue hours decreased from 2,178 hours in January 2009 to 2,115 in January 2010. The average number of riders per revenue hour decreased from 45.5 in January 2009 to 43.7 in January 2010.

Line 6 - Goleta & Line 11 - UCSB

Lines 6 & 11 were enhanced to provide alternating service every 10 minutes during weekday morning and afternoon peak periods, from downtown Santa Barbara to Hollister at Fairview (compared to the previous schedule of every 15

minutes). Line 6 continuing to Camino Real Marketplace and Line 11 continuing to the airport and UCSB now run every 20 minutes during weekday peak periods (compared to the previous schedule of every 30 minutes).

Table 1 shows that total combined ridership on Lines 6 & 11 decreased from 149,079 in January 2010 to 142,959 in January 2009. When compared to the January before implementation of the Enhanced Transit Program, Lines 6 & 11 also continue to show a significant increase in average daily total and peak period ridership.

Table 2 presents combined Lines 6 & 11 revenue hours, which decreased from 3,560 hours in January 2009 to 3,520 hours in January 2010. The average number of riders per revenue hour decreased from 41.9 in January 2009 to 40.6 in January 2010.

Line 3 - Oak Park

Line 3 was enhanced to run every 20 minutes all day on weekdays (compared to the previous schedule of every 30 minutes). As shown in Table 1, ridership on Line 3 decreased from 30,350 passengers in January 2009 to 22,875 in January 2010. Line 3 ridership continues to reflect an increase in weekday average daily and P.M. peak riders over the ridership before implementation of the enhancement.

Line 3 revenue hours decreased from 940 hours in January 2009 to 910 hours in January 2010. The average number of riders per revenue hour decreased from 32.3 riders per hour in January 2009 to 25.1 in January 2010.

To: Chair Davis
Members of the Board of Directors
From: Sherrie Fisher, General Manager
Date: 02/19/10
Subject: Administrative Update

The Marketing Department continues with community outreach including recent attendance at both locations of Cottage Hospital for Employee Benefits Fairs. Cottage Health System offers half price transit passes to their employees as a part of their benefit package.

Current outreach also includes Human Resources Department staff attending School Career Days at a variety of locations, including Dos Pueblos High School, Carpinteria High School, and Los Prietos Boys Camp.

Marketing staff is also a member of the CycleMAYnia Committee, and will be actively participating in the creation of bike-centric events during the month of May. This is one of the ways that we promote MTD's Bike and Bus Program.

At staff's request, Buellton and Solvang will work to market information on the Valley Express service through MTD fliers mailed with their water bills. This opportunity gets information about the service into every household in the Cities.

The City of Goleta is placing two new bus shelters on Hollister Avenue to assist waiting passengers. These are on the northbound side of the street at Kellogg in front of Carpinteria and in front of Wendys. We appreciate that the City of Goleta supports transit in this additional way.

MTD now has a total of 411 followers on Twitter.

The Human Resources Department arranged meetings for staff members with PacifiCare representatives to review benefit changes to health insurance.

Carpinteria's First Friday was held on February 5th and was served by extended hours of operation of the Seaside Shuttle.

For the Presidents Day holiday on February 15th, MTD provided service at a Saturday level. Due to the remarkably nice weather, and increased traffic on the freeway, Operations staff added a booster trip for Line 24 at 6:45P.M. (due to an overloaded bus) and solved on-time performance on several freeway trips of Lines 20, 21 and 24.

Drivers will begin the new bid on March 29th.

A procurement funded with stimulus money that MTD received through the American Recovery and Reinvestment Act of 2009 (ARRA) is in process. Bids have been received for replacement service vehicles, including driver relief cars, road supervisor vehicles, and maintenance vehicles. Staff is currently evaluating the bids to determine if they are responsive and responsible, and will return at a future meeting with recommendations.

General Manager Fisher attended a Solvang City Council meeting on February 8 and a Buellton City Council meeting on February 11 to update these City Councils on the Valley Express. Both councils were unanimously supportive of continuing service for their residents, and asked that MTD go forward with the planned request to SBCAG for

an increase in the FY 2010 subsidy for the service. The SBCAG Board unanimously approved said request on the morning of February 18.

As required by the Federal Transit Administration (FTA), staff submitted the January monthly Safety & Security Reports and Ridership Reports for MTD and Easy Lift.

All agencies that received stimulus funding from the American Recovery and Reinvestment Act of 2009 (ARRA) are required to submit several reports on an ongoing basis. Staff submitted a monthly report for the House of Representatives Transportation and Infrastructure Committee, and an annual report for the FTA.

Staff attended a Special Meeting of the Santa Barbara City Council on February 11 regarding Plan Santa Barbara, the ongoing update of the City's General Plan. Staff made a public comment regarding MTD's continuing desire to be involved in the elements of Plan Santa Barbara that relate to transportation.

Bus #907 has been returned from Valley Power Systems following replacement of the electric drive unit (EDU) under the Allison Transmission Field Action program. Bus #906 is now in progress with the others to follow.

The required two annual storm water runoff samplings have been taken. Results of the first sampling were within set parameters and analysis of the second set is in progress.

Numerous routine facility maintenance requests handled this period.