

**Metropolitan Transportation Commission  
Programming and Allocations Committee**

July 8, 2009

Item Number 2g

**Resolution No. 3858, Revised**

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**Subject:** FY 2008-09 State Transit Assistance (STA) Regional Coordination Program.

**Background:** Consistent with MTC's adopted STA Population-Based Consolidated policy, MTC Resolution No. 3837, population-based STA funds are available to support special projects of regional interest and transit coordination projects, especially those identified in the Commission's SB 1474 Transit Coordination Implementation Plan.

The Commission annually adopts the STA Regional Coordination Program. Attachment A to MTC Resolution No. 3858 updates the programming for FY 2008-09. Attachment B provides information about individual programming elements with detail of how the funds will be used.

Staff recommends programming an additional \$700,000 of STA to cover TransLink<sup>®</sup> operations costs through June 30, 2009. Actual operating costs for FY 2008-09 exceeded the amount of STA funds originally programmed for TransLink<sup>®</sup> operations. The increased costs are due to MTC having made retroactive payments based on the calculation of the annual inflation rate for TransLink<sup>®</sup> contract prices in previous years.

After this programming action, the STA Regional Coordination Program will have an estimated fund balance of \$9.0 million. These funds are reserved to meet existing project commitments in future years.

**Issues:** None

**Recommendation:** Refer MTC Resolution No. 3858, Revised to the Commission for approval.

**Attachments:** MTC Resolution No. 3858, Revised

Date: June 25, 2008  
W.I.: 1152  
Referred by: PAC  
Revised: 07/22/09-C

ABSTRACT

Resolution No. 3858, Revised

This resolution establishes a one-year program for Fiscal Year 2008-09 for MTC State Transit Assistance (STA) Regional Coordination funds.

Further discussion is contained in the Programming and Allocation Summary sheet dated June 11, 2008.

This resolution was revised on July 22, 2009 to program an additional \$700,000 to TransLink<sup>®</sup> operations.

Date: June 25, 2008  
W.I.: 1152  
Referred by: PAC  
Revised: 7/22/09-C

Attachment A  
Resolution No. 3858, Revised

**STA Regional Coordination Program  
FY 2008-09**

FY 2008-09 STA Fund Estimate <i>(note 1)</i>	\$ 22,894,558
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<b>Project Name</b>	<b>Claimant</b>	<b>Amount</b>
TransLink®	MTC	\$ 8,786,000
TransLink® Grant Administration	GG Transit	\$ 10,000
511 Transit	MTC	\$ 269,000
Real-Time Transit Information	MTC	\$ 54,000
Transit Connectivity	MTC	\$ 671,000
Regional Transit Marketing	MTC	\$ 91,000
Regional Public Opinion Poll/Customer Survey	MTC	\$ 100,000
Regional Architecture	MTC	\$ 50,000
Regional Operations Staff and Contractor Staff Support	MTC	\$ 2,140,102
Regional Operations Support Contingency	MTC	\$ 400,000
Project Management Tools/IFAS Customization	MTC	\$ 200,000
Regional Operations Audits	MTC	\$ 150,000
Regional Paratransit Program	CCCTA	\$ 75,000
Community-Based Transportation Planning	MTC	\$ 300,000
Environmental Justice Assessment	MTC	\$ 65,000
Lifeline Staff Support	MTC	\$ 121,410
Regional Emergency Planning	MTC	\$ 62,500
Transit Emergency Satellite Telephones	MTC	\$ 16,500
Legislative Consultant	MTC	\$ 216,200
Transit Facilitation/Studies Contingency	MTC	\$ 137,500
<b>Total</b>		<b>\$ 13,915,212</b>

STA Balance Estimate	\$ 8,979,346
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Notes:

1. The fund estimate is based on the February 2008 fund estimate for STA Population-based funds in MTC Resolution 3845. The STA Regional Coordination portion of that fund is \$13,036,558. An additional \$9,858,000 is added to reflect the rescission of STA Allocation #08-3811-10 for Transit Connectivity in April 2008 because of a Proposition 1B fund swap.

Date: June 25, 2008  
W.I.: 1152  
Referred by: PAC  
Revised: 7/22/2009-C

Attachment B  
Resolution No. 3858, Revised  
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## **STA Regional Coordination Program Summary FY 2008-09**

STA Regional Coordination Funds have historically supported some of MTC's regional operations projects as well as other planning and operational efforts to improve coordination of, and access to, transit services in the Bay Area. Many of these projects have been identified in the Commission's SB 1474 Transit Coordination Implementation Plan. Specific SB 1474 plan goals include: (1) Improve service to the transit customer, (2) Increase system efficiency through coordination of specific functions, and (3) Develop sub-regional coordination agreements between connecting agencies.

The FY 2008-09 STA Regional Coordination Program totals \$13,915,212 and generally focuses on delivering TransLink<sup>®</sup>, 511 Transit, and Transit Connectivity consistent with the Commission's Transportation 2030 Plan and other regional planning documents. In addition, funds are programmed to implement other MTC operational projects. More detail about the specific projects and the amount of STA funds programmed to each follows.

### **TransLink<sup>®</sup>**

***Programmed to MTC:           \$8,786,000***

***Programmed to GGT:         \$10,000***

TransLink<sup>®</sup> is the Bay Area's new regional transit fare payment system. When fully implemented, transit riders will be able to pay transit fares on any transit system in the region with a reloadable TransLink<sup>®</sup> smart card. The TransLink<sup>®</sup> card stores transit value – electronic cash (e-cash) and/or transit passes, and transit riders “tag” the card by touching it to a TransLink<sup>®</sup> card reader when boarding a transit vehicle or entering a station. The reader deducts the correct fare including any transfers or other discounts. TransLink<sup>®</sup> is currently operating on AC Transit and Golden Gate Transit and Ferry (GGT). The system will soon expand to BART, Caltrain and Muni, and eventually is expected to be available on every transit system in the region.

MTC's TransLink<sup>®</sup> responsibilities include oversight of a contract with Motorola, Inc. to design, build, operate and maintain the TransLink<sup>®</sup> system and of a number of other contracts related to the implementation and operation of the TransLink<sup>®</sup> system. MTC has provided funds for the implementation of the program, and MTC will pay a portion of the ongoing fixed and variable operating costs. The transit agencies are responsible for operating and maintaining TransLink<sup>®</sup>

on their respective systems, and the transit agencies pay a portion of the ongoing variable operating costs.

- \$5,600,000 in STA funds will cover MTC's share of fixed and variable operating costs associated with the TransLink<sup>®</sup> project. Operating costs are incurred through MTC's contracts with Motorola, Inc. for operation of the TransLink<sup>®</sup> system and AT&T, which provides communications services related to TransLink<sup>®</sup> operations. During the coming fiscal year, MTC expects increases in the number of transit riders using TransLink<sup>®</sup> to ride AC Transit and GGT. MTC also expects transit riders to begin using TransLink<sup>®</sup> to ride BART, Caltrain and Muni.
- \$2,900,000 in STA funds are programmed to MTC as part of the incentive fund to cover operating costs for AC Transit, BART, Caltrain, GGT, and SFMTA. Consistent with the TransLink<sup>®</sup> Inter-Agency Participation Agreement, STA funds will support the TransLink<sup>®</sup> Incentive Fund which MTC will use to offset transit operators' shares of the TransLink<sup>®</sup> operating expenses in the first years of TransLink<sup>®</sup> operations.
- \$286,000 in STA funds will serve as local match to federal funds for TransLink<sup>®</sup> capital costs.
- \$10,000 in STA funds will cover GGT's administration of federal funds used to support the implementation of the TransLink<sup>®</sup> system.

### **511 Transit**

***Programmed to MTC:           \$269,000***

In FY 2008-09, STA funds will serve as local match to federal STP funds for the 511 Transit program. 511 Transit collects, maintains, updates and distributes region-wide transit service information for the benefit of the traveling public and MTC's transit partners. The three major components are:

- 511 Transit Website – The 511 Transit website contains schedule, route, fare and map information for all transit agencies in the Bay Area as well as the current trip planner. Access to the 511 Transit website is provided through MTC's traveler information portal ([www.511.org](http://www.511.org)) where traffic, ridesharing and bicycle information is also available.
- Regional transit trip planner – The public can plan transit itineraries any time of the day or night using the internet-based 511 TakeTransit Trip Planner<sup>SM</sup>. Transit agency call center staff also has access to the trip planner for assisting customers with trip planning. A new trip planner is being introduced in the spring of FY 2007-08.
- Regional Transit Database (RTD) – The RTD is the central repository and data management system for comprehensive regional transit data used in the 511 Transit website, including the trip planner.

### **Real-Time Transit Information**

***Programmed to MTC:           \$54,000***

The 511 Strategic Plan (completed in April 2006) and the Regional Connectivity Study (adopted by the Commission in June 2006) found that provision of real-time information was an important

tool to improve the customer experience on Bay Area transit services. The program consists of three separate efforts:

1. Transit operator deployments of passenger information systems so that they can provide real-time data.
2. Regional real-time data clearinghouse, developed and operated by MTC.
3. Dissemination of real-time data on 511 phone, 511 web, and on display signs at regional transit hubs.

As part of this program, MTC is implementing a system of regional transit stop identification numbers to simplify user access to real-time information. MTC will begin marketing the availability of real-time departure information for MUNI and BART in FY 2008-09. The STA funds will serve as local match to federal funds.

### **Transit Connectivity**

***Programmed to MTC: \$671,000***

In April 2006, MTC adopted a Transit Connectivity Plan and incorporated its findings into the SB 1474 Transit Coordination Implementation Plan (Resolution 3055, Revised). In July 2006, MTC adopted the funding component of the Transit Connectivity Plan (Resolution 3771), which specifies the roles and responsibilities of MTC and the transit operators to pay for specific transit connectivity improvements at regional transit hubs. Consistent with the funding plan, MTC is investing \$10 million in initial capital improvements at 24 regional transit hubs (including 3 airports). The focus is to improve wayfinding signage, real-time transit information and static transit information at these hubs. The primary source of funding for this project will be Proposition 1B Public Transportation, Modernization, Improvement and Service Enhancement Account (Prop 1B Transit) funds. Prop 1B Transit funds replace STA funds originally programmed to the project. These STA funds were redirected to fund Lifeline Transit in accordance with Resolution 3814.

In addition to the initial capital improvements, the plan recommends a greater regional commitment to maintaining transit information in the transit information displays (TIDs). MTC will maintain the TIDs on behalf of the region. In FY 2008-09, \$188,000 is programmed for ongoing maintenance activities. Another \$50,000 in STA funds is programmed for review and monitoring of performance toward meeting the region's transit connectivity objectives.

In FY 2008-09, \$333,000 will be programmed to support the distribution of regional transit information at a kiosk/s located at the Embarcadero BART/Muni station. Following the recommendations made in MTC's 2006 Transit Connectivity Plan, the transportation information kiosk provides the venue to distribute 511, TransLink, FasTrak, and other MTC-sponsored information and display real-time transit information for BART, Muni and ferries. The funds will cover kiosk operations.

A Regional Transit Call Center was proposed in the Transit Connectivity Plan and again during the development of the Transportation 2035 Regional Transportation Plan. The Call Center project proposes to improve transit customer service by providing access to live operator

assistance twenty-four hours per day/seven days per week, including help in multiple languages. Currently, the days and hours of customer service center operation vary by operator, so live operator assistance is inconsistent across the region. MTC will conduct a feasibility analysis for a Regional Transit Call Center concept to explore business models, review telecommunication and technology options for call center systems, further evaluate costs and develop recommendations. \$100,000 of STA funds will support the completion of this analysis.

### **Regional Transit Marketing**

***Programmed to MTC: \$91,000***

Marketing funds will be used to provide marketing, market research and support services for the 511 Traveler Information and TransLink<sup>®</sup> Programs, as well as to address other ad-hoc transit marketing needs. Consistent with the findings of the 511 Strategic Plan, the program will maintain its focus on increasing and sustaining usage of the 511 phone number and website (511.org) as well as developing a better understanding of how customers use the 511 system. As TransLink<sup>®</sup> continues deployment on individual transit agencies in FY 2008-09, the program will promote the TransLink<sup>®</sup> card to transit riders to increase market share of TransLink<sup>®</sup>. STA funds will serve as local match to federal CMAQ funds for Regional Transportation Marketing.

### **Regional Public Opinion Poll/Customer Survey**

***Programmed to MTC: \$100,000***

Many of MTC's regional operations projects are customer-driven. Feedback from customers on the types of services they want and the best way to provide those services plays an important role in shaping project delivery. In FY 2008-09, MTC will spend \$100,000 to better understand public awareness and opinions of regional services. Topics may include fare payment, traveler information, customer service and other transit connectivity issues.

### **Regional Architecture**

***Programmed to MTC: \$50,000***

\$50,000 will fund maintenance activities for the Bay Area Intelligent Transportation System (ITS) Architecture, which details how transit and other ITS projects relate to one another. The funds will also be used to provide technical assistance to project stakeholders and explore potential solutions to a series of policy issues that were identified during the regional architecture update in FY 2007-08.

### **Regional Operations Staff and Contractor Staff Support**

***Programmed to MTC: \$2,140,102***

Consistent with past practice, FY 2008-09 STA funds will support a portion of MTC staff and contract employee costs related to the TransLink<sup>®</sup>, 511 Transit, Real-Time Transit Information, and Transit Connectivity projects. These projects are important transit coordination efforts under the SB 1474 Transit Coordination and Implementation Plan. This staffing and contractor staff

support need is in response to the high visibility of these projects and the need for continuous coordination with transit agencies to ensure successful implementation.

### **Regional Operations Support Contingency**

***Programmed to MTC: \$400,000***

These STA funds would be used in the event of unforeseen project needs or operating shortfalls with respect to MTC's regional operations projects such as TransLink<sup>®</sup>, 511 Transit, or Transit Connectivity. Unspent contingency funds will either be returned to the STA program at the end of FY 2008-09 for future reallocation to regional projects, or retained (in which case they will offset next year's contingency request).

### **Project Management Tools/IFAS Customization**

***Programmed to MTC: \$200,000***

MTC will identify needs and solutions to improve internal project and budget management. More specifically, STA funds will be used to implement new tools to integrate and use the Accounting Department's Integrated Financial and Administrative Solution (IFAS) software more efficiently. Included in this effort will be to identify and create specific customized project management reports using the existing IFAS system. As a part of this effort, the expertise of a consultant from the IFAS software company is expected to be a part of the solution. In addition, MTC may also explore and implement other tools to facilitate project management at MTC.

### **Regional Operations Audits**

***Programmed to MTC: \$150,000***

MTC will contract with an audit firm to conduct contract closeout audits, contract compliance audits, and other agreed upon procedure type audits for its transit-related projects. There may also be contracts that require an audit before retention is released.

### **Regional Paratransit Program**

***Programmed to CCCTA: \$75,000***

In FY 2008-09, \$75,000 in STA funds will support a 'lead agency' for the Regional Paratransit Program. This approach is consistent with the goals of the Transit Coordination and Implementation Plan, which endorses the concept of reimbursement for services provided by a Lead Agency on behalf of other operators. The lead agency is the Central Contra Costa Transit Authority (CCCTA). CCCTA will coordinate paratransit operational activities such as:

- Oversight of the Paratransit Eligibility Program and Regional Eligibility Database, and delivery of the Paratransit Technical Assistance Program through a consultant; and
- Liaison between the PTCC Accessibility Committee and MTC, including reporting on the status of activities.

CCCTA will provide progress reports summarizing work performed.

### **Community-Based Transportation Planning**

***Programmed to MTC: \$300,000***

The Community-Based Transportation Planning (CBTP) program is a collaborative planning process that involves residents in minority and low-income communities, community organizations that serve them, transit operators, congestion management agencies and MTC. The outcome of the planning process is a community-based transportation plan that includes locally-identified transportation needs, as well as solutions to address them. STA funds will be used to support planning efforts in the low-income communities of concern listed in the Transportation 2030 Equity Analysis.

### **Environmental Justice Assessment**

***Programmed to MTC: \$65,000***

STA funds will be used for a contract to analyze the environmental justice (EJ) implications of MTC's planning efforts. MTC's identified EJ communities have high concentrations of transit-dependent low-income and minority residents.

### **Transportation Equity/Lifeline Staff Support**

***Programmed to MTC: \$121,410***

STA funds will be used to cover staff cost related to MTC's smart growth and environmental justice work, such as management of the Lifeline Transportation Program grants and development of the equity analysis for the Regional Transportation Plan.

### **Regional Emergency Planning**

***Programmed to MTC: \$62,500***

STA funds will be used to conduct region-wide transportation emergency preparedness exercises. These efforts include exercise design, conduct, assessment and refinement of the region's transportation agencies capability to activate emergency operations centers and implement emergency operations plan to facilitate a coordinated response to a regional disaster.

### **Transit Emergency Satellite Telephones**

***Programmed to MTC: \$16,500***

In FY 2008-09, \$16,500 in STA funds is programmed to MTC to cover one year of operating costs for fixed satellite telephones for emergency communications between eight transit agencies.

### **Legislative Consultant**

***Programmed to MTC: \$216,200***

STA funds will be used for MTC's contract for legislative consultant work in Washington, D.C. The legislative consultant performs important advocacy and reconnaissance services related to transit on behalf of the region.

**Transit Facilitation/Studies Contingency**

***Programmed to MTC:           \$137,500***

These funds will allow MTC to respond to regional or subregional transit planning needs or requests as they arise throughout FY 2008-09. For example, a study may be completed that recommends additional follow-up, a partnership opportunity may arise that benefits MTC's regional transit coordination objectives, or a particularly difficult regional issue may emerge that requires consulting assistance to forge consensus.