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## *Memorandum*

TO: Select Committee on Transit Sustainability

DATE: July 9, 2010

FR: Executive Director

W. I. 1227

RE: Transit Sustainability Project Update

On May 14<sup>th</sup>, we held the joint kick-off meeting with the Commission's Select Committee on Transit Sustainability and the Project Steering Committee. We will continue to hold joint meetings approximately every six months over the course of the project in order to facilitate communication between the Project Steering Committee and the Commission. The Project Steering Committee will have the opportunity to provide guidance and direction throughout the course of the project and to review and comment on findings from the technical analysis prior to the information coming before this Committee. A summary of the kick-off meeting is attached. We are following up on three key points from the meeting:

### **1) Communications**

Several members of the Select Committee and Steering Committee stressed the importance of developing positive key messages and being vigilant about the public perception of the project and how it reflects on transit more generally. We are in the process of developing a draft communications plan, which will be presented for Committee review in September. The draft plan identifies audiences, message themes, and methods to disseminate pertinent information about the project at all stages.

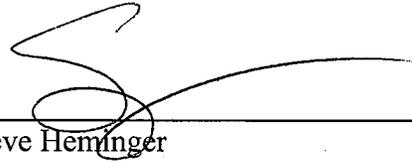
### **2) Project Approach and Scope**

At the kick-off meeting, Committee members requested additional information about the project approach and scope. More information, and a request for approval of the Project Work Plan, is included in agenda Item #3.

### **3) Technical Analysis and Formation of Technical Advisory Committees (TACs)**

Since the kick-off, both the Financial and Regional Service TACs have been established. The Financial TAC had its first meeting in late May and will meet again in early July. The Regional Service TAC is slated to have its first meeting in late July. The TACs will provide technical agency expertise to help guide the analysis, ensure that work is not duplicative of individual transit agency efforts and builds on readily available information from these efforts, and help develop the detailed approach, scopes of work, and proposed outcomes of each area of analysis. Item #3 provides additional detail about the technical analysis.

**Next Steps:** Staff will continue to work with the project's TACs and the consultants to advance the technical analysis. The work will focus on advancing the financial analysis, beginning the regional service analysis, and initiating the focused service analyses. Staff anticipates presenting the draft Communications Plan, initial findings from the financial analysis, and a more detailed service analysis approach based on consultation with the TACs and Project Steering Committee to the Committee in September.

A handwritten signature in black ink, appearing to read 'Steve Heminger', is written over a horizontal line. The signature is stylized with a large, looping initial 'S'.

Steve Heminger

CC: SH

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**Transit Sustainability Project  
Joint Select Committee and Project Steering Committee  
Summary of May 14, 2010 Kick-Off Meeting**

**Introduction**

Chairperson Bill Dodd and MTC Executive Director Steve Heminger made opening remarks to the group about the Transit Sustainability Project and cited the reasons for its timeliness. They noted that many Bay Area transit agencies are facing significant deficits as the cost of providing transit continues to outpace the funding available. They also underscored the significance of transit to the region and how transit will be critical to the region's ability to manage growth.

**Project Description and Initial Perspectives**

Carolyn Clevenger, MTC Project Manager, provided a brief description of the Transit Sustainability Project (TSP). The goal for the TSP is to identify the major challenges facing transit; confront them directly; and identify a path toward a flexible, affordable, well-funded transit system that more people will use for more trips.

Ms. Clevenger described the results of interviews conducted by MTC staff with members of the Steering Committee and Select Committee over the previous several months. The interviews were designed to identify issues, goals, challenges and opportunities related to transit sustainability in the Bay Area. Interview responses were grouped in the three areas for TSP focus: 1) service; 2) financial; and 3) institutional.

Carolyn Verheyen, Principal, MIG, Inc., facilitated the Joint Committee discussion about their perspectives on the possible causes of the current transit problems, and the major opportunities for each focus area. Ms. Verheyen opened the discussion with a review of service-related perspectives distilled from the interviews:

- 1) Transit is not reliable, safe or convenient
- 2) Transit system is confusing: connections are difficult, time consuming
- 3) Transit service is not price or time competitive with the auto alternative
- 4) There is too much service; too little service; service is in the wrong place
- 5) Duplicative services compete for the same riders
- 6) Lack of uniform fare policies disadvantages riders

Committee members were asked for their feedback on these initial perspectives. Some committee members expressed concern about how some of the statements were framed. They advised the project team to be sensitive to how topics are characterized, noting that it is important to emphasize the region's success and the transit agencies' positive achievements, in addition to the current challenges.

Members also reiterated the importance of using a fact-based approach and keeping all issues on the table.

Several members commented on statement #1 regarding safety, reliability and convenience of transit. It was suggested that safety be discussed as a separate topic since it covers many issues and perspectives. Safety issues can be real or perceived and may include a person feeling:

- unsafe while waiting at the station or platform;
- unsafe while in transit; and
- unsafe due to the fears related to uncertain transit connections and uncoordinated schedules.

Additional Comments:

The region's transit system has no unifying theme and looks different throughout the region. It was also suggested that the TSP critically analyze service design and delivery including:

- Appropriate match of service delivery to the market for the service; and
- Evaluation of any duplication of services.
- The analysis should consider a market driven approach.

Capital development and maintenance shortfalls need to be addressed by the TSP. The agencies are successful advancing support for capital expansion projects, but without adequate maintenance, the system continues to deteriorate.

Following this, Ms. Verheyen reviewed the financial-related perspectives gleaned from the interviews, which included:

- 1) Salaries and benefits are costly
- 2) High cost of service is a result of a large administrative structure
- 3) Inefficient work rules inflate cost of delivering service
- 4) Unpredictable revenues result in unstable service and fares

Several members commented on the statements related to salary and benefit costs and work rules:

- Wage and benefit costs are high because we live in an area with a high cost of living.
- Work rules were bargained for and agreed to by the agencies. The TSP should focus on work rules that are outdated due to technology, and those related to efficiency and productivity.
- Agencies have very different cost structures and administrative costs vary widely.
- The TSP should separate out salaries and benefits in order to account for cost of living.

Several members noted that the TSP should be creative in identifying new funding sources for transit. To balance the revenue picture, non-sales tax sources should be pursued, such as employer subsidies, parking and other creative sources. Public/private partnerships should be included as potential solutions. Joint purchases were suggested as a potential way for agencies to reap the benefits of economies of scale.

A recommendation was made that a specific target for transit mode share could help inform what the appropriate level of investment would be.

Finally, Ms. Verheyen reviewed the institutional-related perspectives gleaned from the interviews. They included:

- 1) Expansion policies have resulted in increased operating costs but few new riders
- 2) Political pressure and “return to source” policies keep unproductive routes in service
- 3) Land uses and other external factors confound transit’s effectiveness
- 4) Multiple operators results in a fractured decision-making process and works against a cohesive regional transit network
- 5) Decision-making does not match markets – regional/commute, local/lifeline

Committee members offered the following comments:

- 1) Institutional issues are fundamental to our current problems. While some may be insurmountable, the region can change what service looks like, provide better connectivity, and eliminate duplicative and competing services. It was suggested that TransLink<sup>®</sup>/Clipper<sup>sm</sup> data can assist in analyzing service in the region.
- 2) There is not a match between the political demands for expansion and the region’s “fix-it first” policy.
- 3) Accessibility for seniors and persons with disabilities needs to be improved. With better coordination and connectivity, some users could move from paratransit to transit.

### **Closing Comments and Informal Survey**

In the interest of time, the discussion on institutional perspectives was compressed and next steps were discussed. Several committee members expressed interest in meeting more frequently than the proposed quarterly schedule and they requested that they be kept well-informed of project activities. They also emphasized the importance of how this project and its findings are communicated to the public.

In conclusion to the meeting, Committee members were given a survey sheet listing the 15 initial perspectives discussed in the meeting and were asked to select their top five. The responses were submitted anonymously. The initial perspectives with the highest number of votes included the following five, in descending order:

- 1) Unpredictable revenues result in unstable service and fares
- 2) Multiple operators results in a fractured decision-making process and works against a cohesive regional transit network
- 3) Land uses and other external factors confound transit’s effectiveness (same votes as #4)
- 4) Inefficient work rules inflate cost of delivering service (same votes as #3)
- 5) Transit service is not price or time competitive with the auto alternative

The attached table summarizes results for all 15 perspectives.

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Initial Perspectives on Causes	Times Selected	Service				
1. Transit is not reliable, safe or convenient.	4		Service			
2. Transit system is confusing; connections are difficult, time consuming.	5			Service		
3. <b>Transit service is not price or time competitive with the auto alternative.</b>	11				Service	
4. There is too much service; too little service; service is in the wrong place.	6					Service
5. Duplicate services compete for the same riders.	5					
6. Lack of uniform fare policies disadvantages riders.	1	Service				
7. Salaries and benefits are costly.	6		Financial			
8. High cost of service is a result of large administration structure.	4			Financial		
9. <b>Inefficient work rules inflate cost of delivering service.</b>	12				Financial	
10. <b>Unpredictable revenues result in unstable service and fares.</b>	14					Financial
11. Expansion policies resulted in increased operating costs but few riders.	2		Institutional			
12. Political pressure and “return to source” policies keep unproductive routes in service.	6	Institutional				
13. <b>Land uses and other external factors confound transit’s effectiveness.</b>	12			Institutional		
14. <b>Multiple operators results in a fractured decision-making process and works against a cohesive regional transit network.</b>	13				Institutional	
15. Decision-making doesn’t match markets (regional/commute, local/lifeline).	5					Institutional