

## REGIONAL TRANSIT AUTHORITY EXECUTIVE COMMITTEE AGENDA

PLEASE NOTE THE DATE, TIME, AND LOCATION:

**Wednesday, February 19, 2014**

**10:00 a.m. – 11:30 a.m.**

**SLOCOG Conference Room**  
**1114 Marsh Street**  
**San Luis Obispo, California**

This agenda is available/posted at: <http://www.slorta.org/board/rta-board-meetings>

Individuals wishing accessibility accommodations at this meeting under the Americans with Disabilities Act (ADA) may request such accommodations to aid hearing, visual, or mobility impairment by contacting the SLORTA offices at 781-4833. Please note that 48 hours advance notice will be necessary to honor a request.

- 1. Call Meeting to Order, Roll Call**
- 2. Public Comment:** The Committee reserves this portion of the agenda for members of the public to address the San Luis Obispo Regional Transit Authority Executive Committee on any items not on the agenda and within the jurisdiction of the Committee. Comments are limited to three minutes per speaker. The Committee will listen to all communication, but in compliance with the Brown Act, will not take any action on items that are not on the agenda.
- 3. Information Items**
  - A-1 Executive Director's Report (Information)
  - A-2 RTA Bus Stop Improvement Prioritization Report (Information; Appendix to be provided at the meeting)
  - A-3 Draft Revised Runabout No-Show Policy (Information)
- 4. Action Items**
  - B-1 RTA FY14-15 and FY15-16 Budget Assumptions (Approve)
  - B-2 RTA Reserve Policy (Approve)

The Regional Transit Authority is a Joint Powers Agency serving the residents and visitors of:

**Arroyo Grande Atascadero Grover Beach Morro Bay Paso Robles Pismo Beach San Luis Obispo County of San Luis Obispo**

- B-3 North County Transit Consolidation Service Changes (Approve)

## 5. Consent Items

- C-1 Executive Committee Meeting Minutes of December 11, 2013 (Approve)
- C-2 RTA Customer Perception Survey (Approve)

## 6. Agenda Review – below are items that will be presented at the March 5, 2014 Board meeting:

### Information Items

- A-1 Executive Director's Report (Information)
- A-2 RTA Bus Stop Improvement Prioritization Report (Information)
- A-3 Revised Runabout No-Show Policy (Information)

### Action Items

- B-1 RTA FY14-15 and FY15-16 Budget Assumptions (Approve)
- B-2 RTA Reserve Policy (Approve)
- B-3 North County Transit Consolidation Service Changes (Approve)

### Consent Items

- C-1 Executive Committee Meeting Minutes of December 11, 2013 (Approve)
- C-2 RTA Customer Perception Survey (Approve)

### Closed Session Items

- D-1 It is the intention of the Board to meet in closed session concerning the following items:
  - D-1-1 Conference with Labor Negotiator Geoff Straw concerning the following labor organization: Teamsters Local Union No. 986
  - D-1-2 Conference with Real Property Negotiator  
40 Prado Road, San Luis Obispo

## 7. Closed Session Items

None

## 8. Adjournment

Next Executive Committee Meeting: **April 16, 2014**

# **SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**January 19, 2014**

## **STAFF REPORT**

**AGENDA ITEM:** A-1

**TOPIC:** Executive Director's Report

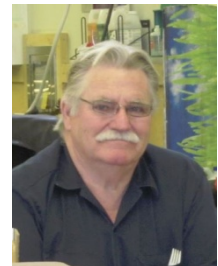
**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Accept as Information

### **BACKGROUND/DISCUSSION:**

#### **Operations:**

RTA conducted its quarterly Employee of the Quarter barbecue lunch on January 24th, and the winner (mechanic Fred Carlberg) will join us at our March 5, 2014 Board meeting. Fred joined RTA soon after we took the service in-house in August 2009. While he performs a wide array of vehicle preventive maintenance and repair tasks, he specializes in electronic diagnosis and troubleshooting. That is particularly important, since our newer vehicles are increasingly more complex in comparison to buses manufactured only a few years ago. Please join me in thanking Fred for his great work keeping the buses operating in a safe and reliable condition, and for being such a great team member. Our next Employee of the Quarter celebration is scheduled for April 18, 2014.



Although RTA began with new Bus Operator training class of five candidates on January 6<sup>th</sup>, four trainees remain. Based on our standard six-week training period, it is expected these new Bus Operators will be ready for revenue service prior to the March 5<sup>th</sup> Board meeting. Please join me in welcoming Erin, Teena, David and Ryan to the RTA Team.

RTA continues to work with SLOCOG and the Cities of Atascadero and Paso Robles to implement the consolidation elements detailed in the two separate jurisdiction agreements. The City of Atascadero ratified their agreement on January 14<sup>th</sup> and the City of Paso Robles ratified their agreement on January 21<sup>st</sup>. Staff has met with most of the current First Transit employees that operate the Paso Express and Atascadero El Camino Shuttle programs, and will begin the formal application process in the last week of February. It is anticipated that training will begin in the latter part of March in order to meet the June 1<sup>st</sup> consolidation implementation date. The consolidation will result in up to nine new Bus Operator positions, two new Operations Supervisor positions, and a Special Projects Coordinator – all of which will be fully-funded and accounted for in a separate North County budget. Further updates are provided under Agenda Item B-3.

The Regional Transportation Advisory Committee met on January 15<sup>th</sup>. RTAC expressed support for RTA's suggested North County service planning milestones, as well as for the results from the RTA Customer Perception Survey as it relates to potential new performance standards in RTA's Strategic Business Plan. These issues are discussed in more detail in Agenda Items B-3 and C-2, respectively. It should be noted that Michael Seden-Hansen was elected as the new RTAC Chairman, and Eric Greening was elected as the new Vice-Chairman.

#### **Maintenance:**

RTA continues to meet preventive maintenance schedules according to manufacturer recommendations. In addition, RTA has taken delivery of two replacement shop trucks and one Ford Focus staff car, and we expect to take delivery of two more Focuses in the coming weeks. These new vehicles will replace trucks and cars that were previously surplus by the County and subsequently purchased by RTA.

#### **Service Planning & Marketing:**

At its February 5<sup>th</sup> meeting, the SLOCOG Board formally adopted its CMAQ grant award program as part of the revised RTIP. This CMAQ funding includes 80% Federal and 20% local capital funding for two over-the-road coaches and operations funding for three years to operate expanded express services on the US101 corridor (RTA Routes 9 & 10). As soon as the joint procurement contract with the MCI Corporation is signed by the lead-agency (Antelope Valley Transit Authority), staff will bring a resolution to the Board to authorize staff to purchase these two vehicles. Finally, when FTA provides notice of funding availability as early as May 2014, staff will exercise the purchase option. It is our hope that this can be finalized during the summer months and that the vehicles could be delivered by summer 2015 for service implementation in August 2015. In the meantime, if overcrowding challenges persist, staff could seek FTA permission use CMAQ operating funds as soon as possible to implement the new service using older Gillig buses (currently planned for retirement) until the new buses arrive.

RTA continues to work with Cambria area officials to provide special/holiday Cambria Trolley services as part of the County Services contract. On December 6<sup>th</sup> we boarded 278 passengers as part of the Hospitality Night service, and 52 passengers on January 25<sup>th</sup> for the Cambria Art and Wine Festival. Both events were well-received, and no significant challenges were encountered.

#### **Finance and Administration:**

After serving as the FTA Administrator since May 2009, Peter Rogoff was recently nominated as the Acting Undersecretary for Policy of the US DOT. This is the third-ranking position at DOT. Staff will update the Board when the new FTA Administrator is appointed.

Working closely with FTA's contractor, RTA recently completed the on-site portion of the FTA Triennial Review. In total, 18 areas of compliance were tested, and RTA was found to be fully-compliant in 17 areas. However, RTA's Runabout No Show Policy was found to not contain appropriate clauses that clearly define a pattern or practice of passenger

no-shows and/or late-cancellations. Nonetheless, the FTA reviewer stated that she was pleased with the policies and procedures RTA has in place to ensure FTA compliance, and has recommended a number of our documents be considered Best Practices that other small transit agencies can use as examples when developing their own policy and procedures documents.

Staff has agreed with FTA staff that RTA should be able to adopt a revised Runabout No-Show Policy prior to the August 22, 2014 deadline. Staff has reviewed model policy documents from other transit agencies, and has submitted a new draft to FTA Region 9 officials on February 7<sup>th</sup> for review. Assuming the draft document could be blessed by FTA officials in the coming weeks, staff would present it to the Board for an initial reading and solicitation of public input at its March 5<sup>th</sup> meeting. We would then work with disability advocates and Runabout users to solicit additional input, which we could incorporate into a final draft for consideration at the May 7<sup>th</sup> Board meeting. In the meantime, staff will cease issuing suspension notifications to errant riders and instead send warning letters until a new policy is adopted by the Board. An initial draft of the revised Runabout No-Show Policy will be discussed under Agenda Item A-3.

RTA has benefited from the internet-based trip planning feature provided through an arrangement with Google Transit. This tool is prominently featured on RTA's web portal, as well as in Google Maps. Using this tool allows users to determine scheduled bus departures from their origin and arrival times at their destination – including total travel time, required bus transfers and fare amount. A new feature was implemented by Google in early February – it now shows the daily span of service.

We have continued to develop the budget for consideration at the May 2014 Board meeting. Similar to last year, RTA will again be recommending a two-year operating budget (first year financially constrained; second year for planning purposes), while also incorporating a rolling five-year capital plan. The budget assumptions will be considered under Agenda Item B-1.

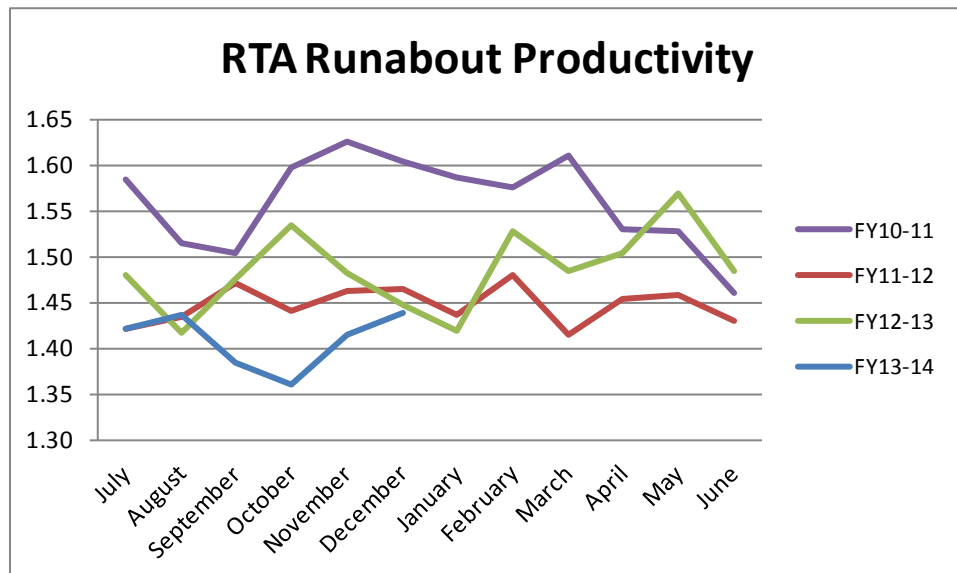
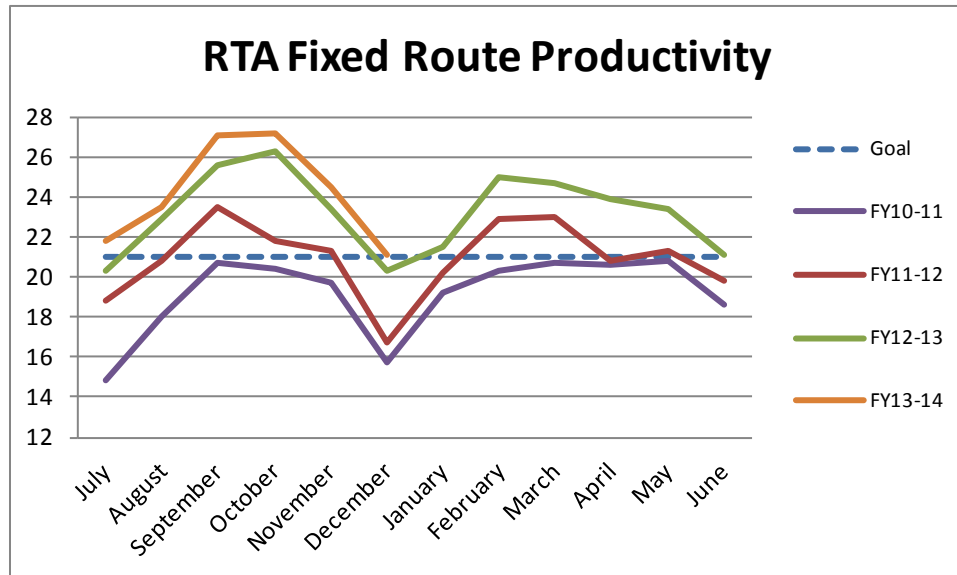
Based on Board and public comments received on the RTA Reserve Policy “white paper” presented at the January 8<sup>th</sup> Board meeting, as well as input from city/county finance staff members, RTA staff has developed a recommended policy that will be considered under Agenda Item B-2.

Preliminary financial data for the first six months of FY13-14 has been reviewed by RTA staff. In summary, this analysis period covers 50% of the budget year, and overall non-capital expenditures equaled 44.9% of the annual budgeted amount. The 20.44% FRR reported for fixed route has declined in comparison to 23.17% for the same period last year. Nonetheless, at this time no budget adjustments are necessary for FY13-14.

Fixed route ridership remains strong, with 386,730 boardings through December 31, in comparison to 363,144 in the prior year. This represents a year-over-year increase of 23,586 boardings, or a proportional increase of 6.5%. Year to date Runabout boardings

total 21,832 passenger-trips through December 2013, equating to a year-over-year increase of 21.1% over the previous year (18,028).

Fixed route productivity of 24.2 passenger-boardings per service hour through December 2013 exceeded RTA's goal of 21. Year to date Runabout productivity equaled 1.41, which is 4.3% lower than in the prior year (1.47). Nonetheless, as depicted in the graphs below, Runabout productivity is improving in comparison to recent months.



In summary, all objective/measurable year to date Performance Measure Standards identified in the 2011 RTA Strategic Business Plan were met or exceeded through December 2013.

**RTA Facility Planning**

Staff continues to work with its realtor services consultant to potentially acquire property to meet RTA's long-term facility needs. This item will be discussed during Closed Session at the March 5<sup>th</sup> Board meeting.

**Labor Relations**

RTA staff continued working with Teamsters officials to negotiate a new contract. However, we jointly declared impasse on January 31 and the existing CBA has expired. Staff will meet with a state-appointed mediator and Teamsters officials on February 24<sup>th</sup>. An update will be provided during closed session at the March 5<sup>th</sup> Board meeting.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 19, 2014**

**STAFF REPORT**

**AGENDA ITEM:** A-2

**TOPIC:** RTA Fixed-route Bus Stop Improvements  
Prioritization Report

**ACTION:** Approve

**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Accept the RTA Fixed-Route Bus Stop  
Improvements Prioritization Report, and direct  
staff to share it with local jurisdictions served by  
RTA fixed-routes

**BACKGROUND/DISCUSSION:**

To identify existing conditions, bus stops were inventoried in 2013 by an RTA employee from June to October. This report seeks to prioritize RTA fixed-route bus stop improvements so that, to the extent possible, every stop served by an RTA fixed-route is ADA accessible, safe, convenient, and comfortable for citizens and visitors of all ages and abilities, including those who use mobility devices like wheelchairs, scooters, rolling luggage, and strollers.

In order to inform local jurisdictions of existing conditions of bus stops and share a methodology for prioritizing infrastructure improvements from RTA's perspective, staff proposes submitting the RTA Fixed-Route Bus Stop Improvements Prioritization Report to local jurisdictions served by RTA fixed-routes. Local jurisdictions (not RTA) own and/or control bus stops served by RTA, and local jurisdictions will continue to maintain authority in prioritizing infrastructure improvements within their districts.

Also, staff wishes to use this report to guide fund-seeking efforts for RTA bus stop improvements.

**RECOMMENDATION:**

Accept the RTA Fixed-Route Bus Stop Improvements Prioritization Report, and direct staff to submit it to local jurisdictions served by RTA fixed-routes. Authorize RTA to use this report to guide fund-seeking efforts for RTA bus stop improvement projects.



**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 19, 2014**

**STAFF REPORT**

**AGENDA ITEM:** A-3

**TOPIC:** RTA Runabout No-Show Policy Revision

**ACTION:** Accept as Information

**PRESENTED BY:** Geoff Straw  
Executive Director

**STAFF RECOMMENDATION:** Provide Feedback RTA Runabout No-Show Policy Revision

**BACKGROUND/DISCUSSION:**

This staff report provides discussion on a necessary revision to the RTA Runabout No-Show Policy, which was originally adopted in March 2012. However, due to delays by our dispatching software vendor, staff was not able to begin tracking no-shows/late-cancellations until March 2013. As a result of direction by the Federal Transit Administration as part of our Triennial Review, RTA must amend its current No-Show policy to ensure that a pattern or practice of missed-trips by passengers is impacting our operations.

Attached is a draft revised RTA Runabout No-Show Policy document that considers the proportion of trips that a rider misses when determining if sanctions should apply. Staff from FTA has reviewed the draft policy and has determined that it meets the requirements of the Americans with Disabilities Act of 1990. In the meantime, RTA has ceased enforcing the sanctions identified in the existing Runabout No-Show Policy, but has instead committed to sending notification letters to frequent no-show riders explaining how their missed trips impact our operations and result in poor use of public funds.

It is staff's intent to introduce this draft policy at the March 5<sup>th</sup> Board meeting and seek comments from the public and Board members. Staff would then reach out to disability advocacy groups in the County to solicit further input. The final draft Policy would be presented for adoption at the July 9<sup>th</sup> meeting.

**Staff Recommendation**

Accept the draft revised RTA Runabout No-Show Policy as an information item.

## **RUNABOUT NO-SHOW POLICY**

In an effort to improve the availability of Runabout appointment time slots, to ensure that public dollars are carefully spent on Runabout services, and to make RTA Runabout service more efficient for passengers, RTA has adopted a policy that is designed to deter a pattern of late cancellations and no-shows.

Any Runabout passenger that does not show for a ride or who cancels less than **2 hours** prior to a scheduled trip will receive a no-show penalty. A pattern or practice of no-shows and late cancels can result in suspension of service.

This policy directs RTA staff to consider the percentage of no-shows and late cancellations within a rolling 31-day period to establish if a pattern of no-shows and/or late cancellations is present. If a pattern is present, a warning letter or suspension notification letter will be issued to the customer. The proportion of no-show violations, as well as the related suspension periods, is listed below.

**Riders are allowed the following no-shows and late cancellations, in a rolling 31-day period, before being subject to suspension:**

- 1 to 14 trips per month – maximum of 2 no-show penalties per 31-day period
- 15 to 39 trips per month – maximum of 4 no-show penalties per 31-day period
- 40 to 59 trips per month – maximum of 6 no-show penalties per 31-day period
- 60+ trips per month – maximum of 8 no-show penalties per 31-day period

**If a rider exceeds these limits, they are subject to the following schedule for suspension of service:**

- 1<sup>st</sup> violation – letter of warning
- 2<sup>nd</sup> violation – 7 day suspension
- 3<sup>rd</sup> violation – 14 day suspension
- 4<sup>th</sup> violation – 21 day suspension
- 5<sup>th</sup> violation – 28 day suspension

## **Right to Appeal**

Persons receiving a suspension notification letter will have the right to appeal prior to implementation of the suspension. To file an appeal, a customer or his/her representative must submit to RTA a written explanation of why the customer should not be suspended along with any supporting facts and statements. The appeal must be received within 30 days of the date on the suspension notification letter from RTA. Appeals should be sent to:

Regional Transit Authority Runabout  
179 Cross Street, Suite A  
San Luis Obispo, CA 93401  
Attention: RTA Operations Manager

RTA will conduct an appeal hearing within two weeks of receiving the request, and customers will be permitted to continue to ride the Runabout bus until the final determination is made by the RTA Operations Manager (typically within ten working days of the appeal hearing). The appeal hearing will be conducted by RTA operations, customer service, and administrative staff members. The intent of the hearing is to validate instances of no-shows and late cancellations, and to determine if a temporary suspension is warranted due to a pattern of no-shows and late cancellations.

Penalties will begin accruing July 1, 2014. All no-shows accumulated prior to July 1 will be nullified, and Runabout customers will begin with a clean slate.

# **SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 19, 2014**

## **STAFF REPORT**

<b>AGENDA ITEM:</b>	<b>B-1</b>
<b>TOPIC:</b>	<b>Fiscal Years 2015 and 2016 Budget Assumptions</b>
<b>ACTION:</b>	<b>Approve Budget Assumptions</b>
<b>PRESENTED BY:</b>	<b>Geoff Straw</b>
<b>STAFF RECOMMENDATION:</b>	<b>Approve Budget Assumptions to enable staff to begin development of FY14-15 &amp; FY15-16 Operating Budget</b>

### **BACKGROUND/DISCUSSION:**

The following report outlines staff's budget assumptions recommendation for RTA's Fiscal Year 2014-15 and 2015-16 Operating Budget, and it is the first step in the development of our operating budget and operating program. It should be noted that RTA is again developing a two-year operating budget and five-year capital budget. Upon the Board's guidance and approval of these assumptions, staff will prepare a detailed report along with preliminary budget numbers for presentation to the Executive Committee at their April 16<sup>th</sup> meeting prior to the final draft budget presentation to the Board in May.

### **Objectives**

- Maintain service levels and hours of service that meet the demand of our customers and communities through the effective and efficient delivery of RTA Fixed Route, Runabout, Dial-a-Ride and Trolley services.
- Increase our reserves for the Fiscal Year 2014-15 budget cycle.
- Continue to work with the SLOCOG efficiencies committee in evaluating region-wide service efficiencies.
- Evaluate options and provide analysis on the 5-year capital improvement program and methods to fund these needs.
- Address overcrowding on fixed route runs during peak travel periods.
- Address increasing demand on Runabout service.
- Project the impacts of North County Consolidated Services for both fiscal years.
- Successfully develop a new Collective Bargaining Agreement with Teamsters Local 986 (the previous CBA expired on January 31, 2014).

## **Revenue**

- SLOCOG is working on State Transit Assistance (STA) funding projections for FY14-15. Once those targets are more firmly established, RTA will assume a proportional change in overall STA funding in our FY14-15 budget, and will budget the same amount for FY15-16.
- Staff is not recommending a fare program change for FY14-15, although we may have to consider changes in FY14-15 if TDA or other funding shortfalls emerge or if the collective bargaining agreement wages/benefits currently being negotiated will require it.
- Fare revenue is projected to be \$1,175,000 (farebox and pass sales revenue only) for FY14-15 – roughly 5.4% higher than the \$1,115,000 originally projected in the second year of the current two-year operating budget.
- Federal Transit Administration (FTA) Section 5307, 5311 and 5339 operating and capital funding for both fiscal years shall remain consistent with FY13-14 levels. Should authorizations for federal transportation programs under the MAP-21 successor legislation in FY14-15 increase or decrease for any of these programs, staff would adjust these assumptions accordingly.
- During the current fiscal year, RTA was awarded a total of \$800,000 in FTA Section 5316 JARC funding for FY14-15 to support Route 10 operations and North Coast services (RTA Route 15 and related Runabout). That has temporarily “filled a hole” identified in the second year of the current two-year budget, and will reduce the initially projected need for LTF funds in FY14-15. However, it is the last award of discretionary JARC funds, unless the program is restored in the MAP-21 successor legislation. Staff will work with the Budget Committee and RTAC on options for future years and the impact on LTF.
- FTA Section 5307 operating funding from the City of Santa Maria for Route 10 will be budgeted at \$200,000 for both fiscal years, which is consistent with FY13-14 levels.
- FTA Congestion Mitigation Air Quality funding is assumed to purchase two over-the-road coaches in late FY14-15, and to operate three years of additional express runs on the 101 corridor beginning in FY15-16.
- FY13-14 LTF revenue was budgeted at \$3,756,623. Once the FY14-15 targets are further refined by SLOCOG, RTA will assume a proportional increase/decrease in overall LTF funding in our FY14-15 budget and a similar increase/decrease in the FY15-16 budget. Should there be a budget shortfall due to the loss of funding in either fiscal year, staff would evaluate and make appropriate recommendations on a potential budget amendment or use of reserve funds.
- Staff will continue to explore new revenue resources at the federal, state, and local levels.

## **Expenses**

- Service levels, number of revenue service hours, miles and span of service for RTA fixed route services will be budgeted at current levels for FY14-15.
- Runabout service hours and miles are expected to increase based on increasing demand.

- Should staff be unable to secure adequate funding to operate projected fixed route and Runabout service levels, a reduction of service would be proposed and/or a potential increase in LTF funding would be requested for the Board's consideration.
- Detailed miles/hours and span of service for each route and Runabout will be provided with the draft budget. In addition, detailed miles/hours and span of service will be provided separately for SLO County Services and North County Consolidated Services.
- Staff will use the 2012-14 RTA Strategic Business Plan, the 2010 Fixed Route Performance Standards, the 2012-15 RTA Service Improvement Program, as well as the findings from the 2010 Short Range Transit Plan, to evaluate potential efficiencies and with Board concurrence implement efficiencies during the course of the two fiscal years.
- Fuel consumption and price will be budgeted conservatively; diesel fuel will be budgeted at \$4.15 per gallon. Included in the fuel line item will be diesel exhaust fluid (DEF), used to lower diesel exhaust emissions on the new vehicles.
- CalTIP liability premiums will be increased 10% annually.
- Workers Compensation premiums are projected to increase 20%, with the realization that workers compensation is especially challenging this year for almost everyone. Staff will be working with our broker on this in an effort to obtain a better number prior to April. We have also established an employee committee that has evaluated work comp injuries and has initiated a proactive program to address the number of claims and severity of the claims that we have had during the last year. It is expected that this effort will hasten the return of employees back to work following lost-time work-related injuries.
- For FY14-15 core RTA services, the number of budgeted positions will remain essentially the same as FY13-14, with the following exception: staff is proposing one additional full-time Bus Operator to address burgeoning demand on Runabout services. However, should revenue projections in April indicate that FY14-15 revenue is down, there will be a requisite reduction in the number of FTE's and service levels based upon projected revenue.
- For FY14-15, it is anticipated that the overall number of budgeted positions will increase as part of the North County Consolidation. It should be noted that the marginal costs and revenues of the consolidation will be treated in the budget the same way that SLO County services are depicted: as a separate and distinct column.
- Staff is still closely monitoring the anticipated impacts of the Affordable Care Act on both the number of employees and the costs of per-employee healthcare costs. For budget-making purposes, staff is assuming a 8% annual increase for healthcare costs for each of the next two fiscal years.
- Based on the current projected funding, a 2% annual Cost of Living (COLA) adjustment will be budgeted for non-union employees; the impending new Collective Bargaining Agreement will likely identify annual increases based upon longevity for Bus Operators and Mechanics. Employees within the salary range for their position will be eligible for a step merit increase subject to performance assessments.

- RTA will work with SLOCOG staff and members of the Regional Efficiencies Committees to evaluate efficiencies in the provision of service throughout the county.
- For budget-making purposes, staff is assuming Bus Operator and Mechanic annual wage increases similar to those in the last year of the recently-expired CBA for the next two fiscal years.

### **Proposed Budget Calendar**

February 19 Detailed budget assumptions and revenue forecast to Executive Committee.

March 5 Obtain Board concurrence on proposed draft budget assumptions.

March 5 Provide mid-year FY14 Budget data to Board with any recommended budget amendment.

March 31 Based on feedback from Executive Committee draft FY15 Budget Draft complete.

April 16 Draft FY15 Budget presentation to Executive Committee.

April 17 Formal FY15 Budget presentation to RTAC.

May 7 Final Board Budget presentation. Board adoption of FY15 Budget.

### **Staff Recommendation**

Approve the budget assumptions and budget calendar so that a detailed work plan and budget may be developed.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 19, 2014**

**STAFF REPORT**

**AGENDA ITEM:** B-2

**TOPIC:** RTA Reserve Funds Policy

**ACTION:** Adopt Policy

**PRESENTED BY:** Geoff Straw  
Executive Director

**STAFF RECOMMENDATION:** Adopt New RTA Reserve Funds Policy

**BACKGROUND/DISCUSSION:**

This staff report presents a recommended RTA Reserve Funds Policy and its various components. This policy will provide direction to staff when developing annual budgets and, more importantly, to guide decisions when either funding shortfalls or windfalls result in relatively large deviations from projections.

After presenting a reserve fund “white paper” at the January 8<sup>th</sup> RTA Board meeting and considering input from the public and from Board members, staff forwarded the document to of each jurisdiction’s Finance Manager. Based on all input received, staff is recommending that three distinct reserved funds be established and maintained:

1. Cash Flow Reserve Fund,
2. Capital Projects Reserve Fund, and
3. Operating Reserve Fund.

As explained in the attached recommended policy document, each reserve fund balance should be reviewed annually during the budget development process to reflect the most recent financial information available. The allocations budgeted for each of these reserve funds would be included in the annual budget and the proposed use of any reserves would be accompanied, when feasible, with a plan for replenishment within a reasonable period of time.

**Staff Recommendation**

Approve the RTA Reserve Funds Policy.





# **SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

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## **RTA RESERVE POLICY**

**Effective March 5, 2014**



## REGIONAL TRANSIT AUTHORITY

### RESERVE POLICY

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This policy provides direction to staff on three reserve funds that should be addressed when developing annual budgets. More importantly this policy will guide RTA on decisions when either funding shortfalls or windfalls result in relatively large deviations from budget projections.

An important consideration of this policy is how the three different reserve funds presented below should be used. The Cash Flow Reserve Fund is self-explanatory; it is intended to be used to fund those projects and programs authorized in the annual budget. However, this policy assumes staff will follow existing procurement and other administrative policies/procedures when using the Capital Projects Reserve Fund. For example, RTA staff must obtain Board approval prior to contracting to purchase a replacement bus – and part of that approval process includes staff's recommendation on how the replacement bus would be funded. In this example, staff would identify FTA participation of 80% and use of the Capital Projects Reserve Fund to cover the remaining 20%.

Another important consideration is the intended limits on flexibility of moving funds from one reserve to another. It is understood that the RTA Executive Director can authorize the use of up to \$5,000 from the Operating Reserve Fund for another RTA intended purpose, as long as that use is expressly reported by the Executive Director at the next regularly-scheduled RTA Board meeting. Any single use of the Operating Reserve Fund requiring greater than \$5,000 will require prior authorization in writing (electronic messages permitted) from the RTA Board President, as well as a report to the RTA Board at its next regularly scheduled meeting. Any projected use of the Operating Reserve Fund that represents greater than 25% of the fund balance will require staff to develop a written action plan to replenish the fund and/or to reduce service levels to bring expenses back in-line with projected revenues.

#### Cash Flow Reserve Fund

RTA will maintain a Cash Flow Reserve representing 25% of annual budgeted net operating costs. Budgeted net operating costs are defined as budgeted total operating costs less budgeted fare revenues. The Cash Flow Reserve Fund is necessary because of two facts:

1. Transportation Development Act funds are disbursed quarterly, and those funds are provided by SLOCOG to RTA at the end of each quarter, and



## REGIONAL TRANSIT AUTHORITY

### RESERVE POLICY

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2. FTA funds are provided on a reimbursement basis only.

The primary funding source for the Cash Flow Reserve Fund is the statewide Transportation Development Act (TDA) program, which is comprised of two components:

1. The Local Transportation Fund, which is derived from a  $\frac{1}{4}$  percent of the general sales tax collected statewide. LTF is collected by the California State Board of Equalization, and distributed to each county based on sales receipts. Each county then distributes LTF to jurisdictions according to population.
2. The State Transit Assistance fund, which is derived from the statewide sales tax on diesel fuel. The STA funds are appropriated by the Legislature to the State Controller's Office. That Office then allocates the tax revenue, by formula, to planning agencies and other selected agencies. State statute requires that 50% of STA funds be allocated according to population and 50% be allocated according to operator revenues from the prior fiscal year.

In practice, RTA has funded a "Cash Flow Requirements Per TDA" amount equal to 25 of the net operating cost for the past several years. The unused amount from the prior fiscal year is carried over to the next fiscal year. RTA staff will present the proportional use of TDA for each jurisdiction in the annual budget document.

#### Capital Projects Reserve Fund

RTA will establish and maintain a Capital Projects Reserve Fund based on 20% of the five-year annual average capital projects cost. This 20% amount represents the typical local match required for Federal Transit Administration funded capital projects. If there is a significant future change in Federal funding, the Capital Projects Reserve Fund policy would need to be reconsidered.

RTA staff will provide a five-year Capital Improvement Program as part of the annual budget-making process. This CIP will identify those smaller projects that assume 100% local funding, as well as those larger projects that assume 80% FTA participation.

In order to minimize the financial impact of establishing this new formal Capital Projects Reserve Fund, staff will present a three-year plan to attain the required amount as part



## REGIONAL TRANSIT AUTHORITY

### RESERVE POLICY

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of the FY14-15 budget. Once the Capital Projects Reserve Fund is fully established, staff will adjust it annually as part of the budget-making process.

#### Operating Reserve Fund

RTA will establish and maintain an Operating Reserve Fund equal to 5% of the “Service Delivery” line-item of the budget. The Service Delivery line-item includes the primary components of providing service – non-Administrative labor (Bus Operators, Mechanics, Supervisors, etc), fuel, insurance and vehicle maintenance costs.

The Operating Reserve Fund could be used by staff to fund unforeseen operating costs not anticipated during the annual budget development process. An example would be a very large increase in the cost of fuel, which represents the second-highest line-item in the RTA operating budget. As soon as the unforeseen operating costs is realized, staff would be required to report it at the next regularly scheduled Board meeting so that plan to replenish the Operating Reserve Fund can be enacted.

In order to minimize the financial impact of establishing this new Operating Reserve Fund, staff will present a three-year plan to attain the required amount as part of the FY14-15 budget. Once the Operating Reserve Fund is fully established, staff will adjust it annually as part of the budget-making process.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 19, 2014**

**AGENDA ITEM:** B-3

**TOPIC:** June 1, 2014 North County Service Change Recommendation

**ACTION:** Consider Service Changes on Route 9

**PRESENTED BY:** Geoff Straw  
Executive Director

**STAFF RECOMMENDATION:** Approve Service Changes effective June 1, 2014

**RTAC RECOMMENDATION:** Approve changes, with further consideration of Cal Poly service

**BACKGROUND/DISCUSSION:**

As a follow-up to the recommendations made by the 2012 North County Transit Study, RTA and North County operators have been working together towards implementing these recommended service efficiencies in the North County to be effective on June 1<sup>st</sup>, 2014.

**Program Objectives**

The following objectives are the premise of the program.

- Focus on core regional services and coordinate local service to maximize efficiencies
- Reduce trip duration for customers
- Provide efficient service to maximize revenue service hours and minimize layover time
- Eliminate service duplication
- Improve system-wide on time performance to 90%
- Improve commute opportunities

- Optimize service hours to provide the most productive and efficient service possible

## **Service Recommendations**

### *Service Changes Specific to North County*

As part of the operating agreements with the cities of Paso Robles and Atascadero, RTA has agreed to:

1. Provide Route 9 local service through Atascadero, including North Atascadero along the El Camino Real corridor that is now served by Atascadero Transit. To eliminate redundancies, Atascadero Transit will cease its fixed route El Camino Shuttle and Saturday Traveler operations on May 31, 2014. The city of Atascadero will continue to operate its own general public Dial-A-Ride service.
2. Provide Route 9 local service to the Twin Cities Hospital in Templeton, currently served by both the Atascadero El Camino Shuttle and Paso Express Route C.
3. Eliminate redundancies by incorporating the current Paso Express Route C into RTA Route 9 local service. This will include service north from Twin Cities Hospital and Las Tablas Park & Ride to the Target shopping area along Theatre Drive near Highway 46, the Gateway Center, downtown Paso Robles, and a service extension to the Cuesta College North Campus.
4. Although RTA will be the new operator, Paso Express Routes A and B will remain unchanged (with connections to the new extended RTA Route 9 at the Paso Transit Center).
5. RTA will directly operate the Paso Robles Dial-A-Ride service.

### *Need to Serve to Fixed-Points*

In order for RTA to provide through-service on RTA Route 9 local routes, RTA must reliably serve two major time points:

- The Cuesta College North Campus will be the terminal point on the north end of the new extended RTA Route 9 local service. A large majority of Cuesta classes start on the hour and end at 50 minutes past each hour. To effectively accommodate riders, RTA Route 9 buses must arrive at ten minutes before the hour and depart no later than the top of the hour.
- All RTA fixed routes currently layover for a short duration at the downtown SLO Government Center, with departures at 33 minutes past each hour. Local trips must meet there, arriving no later than 25 minutes past each hour to ensure efficient and timely connections.

This leaves a maximum of 90 minutes of travel time from the furthest point north (Cuesta campus) to the furthest point south (Government Center).

#### *Need for Service Reduction in Other Areas of the Route*

After reviewing options for bus travel times, staff has identified service options in order to add the new service and still ensure timely service at the two timepoints discussed above:

1. Option 1: Eliminating service to Cal Poly on the “local” (non-express) trips.
  - a. Northbound – the Route 9 local service buses would access northbound Highway 101 at Osos Street and travel north to Santa Margarita.
  - b. Southbound – the Route 9 local service buses would travel south from Santa Margarita, and exit Highway 101 at Monterey Street (same as now) and then continue straight downtown along Monterey Street – bypassing the Cal Poly campus.
2. Option 2: Eliminating Service to Santa Margarita on the local trips. This would be sub-optimal, because there would be no other service to this area. In addition, service along Garden Farms and unincorporated areas south of Atascadero would be reduced.
3. Option 3: Hybrid Option. Under this option, service to Santa Margarita would be provided every other hour, alternating with every other hour service to Cal Poly.
4. Option 4: Limited service to Cal Poly. Under this option, the Route 9 local service buses would use the Amtrak Thruway bus stop near the Performing Arts Center, and then proceed downtown via Grand and Monterey Streets.

While the number of riders in Santa Margarita that would be impacted by Option 2 would be slightly fewer than on the Cal Poly trips, there is no alternative service in this area and therefore, a segment of riders would be left without transit service at all.

Option 3, the hybrid option, would eliminate a regular hourly schedule and be confusing for Bus Operators and riders.

Option 4 would take more time (up to 8 minutes) than is available in the 90 minute run. In order to maintain hourly service under this option, additional buses and Bus Operators would be required.

Staff recommends Option 1, which would eliminate Cal Poly Route 9 local service. Indeed, Route 9 currently operates somewhat of a redundant service, since SLO Transit routes also provide direct service between downtown SLO and the campus. In addition,

some riders could walk or roll between the campus and an existing bus stop on Monterey at Grand. Other riders could choose to transfer to SLO Transit (currently, at no cost for Cal Poly students or staff). Finally, RTA would continue to operate Express trips directly between North County communities (not including south Atascadero or Santa Margarita) and the campus.

In June 2013, service was eliminated to the Cal Poly campus on the southbound Route 9 trips after Noon due to bus schedule constraints, and there was no increase in passenger complaints due to this service change. In addition, RTA has never provided northbound Route 9 service through the Cal Poly campus on the first two trips of the day.

Impacts on the Cal Poly campus will be greatest for peak time commute trips – arrivals between 7:30 AM and 9:30 AM and departures between 3:30 PM and 5:30 PM. It should be noted that RTA Route 9 trips currently carry an average of five to nine riders per trip during these peak travel periods. So those relatively few passengers that currently use the Route 9 local services during the peak travel periods would be forced to either transfer to a SLO Transit bus, walk or roll. And while the SLO Transit buses often times are quite full, SLO Transit rarely has had to refuse service.

### **Options for Cal Poly Riders Using the Route 9 Local Service**

- Transfer to/from SLO Transit (Route 5 to campus and Route 4 from campus)
- Transfer to/from RTA Route 12
- Walk – see map with distances from different points
- Carpool – use Rideshare’s trip matching service
- Vanpool on one of the many existing or set up a new service

The existing express trips that serve Cal Poly will continue to do so, as well as one modified mid afternoon express trip that will be extended when the planned consolidation occurs. Specifically, RTA proposes to modify the current 4:10 PM express trip that leaves Government Center bound for Atascadero to a new “full-length” express route newly scheduled to leave Government Center at 3:00 PM, service Cal Poly (approximately 3:12 PM) and continue on to Atascadero, Templeton Park & Ride and reach Paso Robles about 4:00 PM.

See below for future addition of express trips and service.

### **Future Expansion of RTA Route 9 Express Service:**

RTA has been awarded CMAQ funds to purchase two larger and more comfortable over-the-road coaches to expand service along the Highway 101 corridor. These “Greyhound-type” buses will seat up to 57 passengers and feature enhanced passenger amenities (high-back reclining seats, reading lights, etc.). The CMAQ grant will also increase the number of daily Express Trips on Route 9 and Route 10. Service is expected to be in place within the next 12-15 months.



## Other Changes Proposed Relative to Fares and Policies

Below are a range of minor fare modifications that RTA is proposing relative to consolidation of services and to provide region-wide consistency on which RTA has received public input:

1. Child Fares: RTA is proposing that all transit agency members agree on a uniform fare program for children that will allow children 44" and under to ride for free, with a paying adult. RTA and South County Transit are tentatively in agreement as to this policy. SLO Transit is also considering it.
2. Fare-Free Fixed Route Rides for ADA/Runabout Riders: to be eligible for Runabout service, passengers must submit a doctor-signed eligibility application. RTA and South County Transit permit fare-free boardings of persons who have a Runabout eligibility card, and the consolidation will extend this to Paso Express Routes A & B services. To provide consistency throughout the County – and to attempt to reduce Runabout demand/costs for certain trips – RTA recommends that this also be honored by SLO Transit and Morro Bay Transit. RTA will work with the other agencies to reimburse them on a monthly basis, if necessary.
3. Other Fare Impacts of the North County Transit Consolidation:
  - a. RTA will add a new zone for Templeton, so that travel between Atascadero and Templeton will remain the same as it is now on the Atascadero El Camino Shuttle (\$1.50 regular/ \$0.75 discounted). In addition, the fare for travel from Paso Robles to Templeton will remain the same as it is now on Paso Route C (\$1.50 regular/ \$0.75 discounted).
  - b. Increase in the RTA cash fare between Paso Robles and San Luis Obispo from \$2.50 to \$3.00 (discounted fares would be increased from \$1.25 to \$1.50). This will provide distance/cost equity for Route 10 passengers who travel between Santa Maria and San Luis Obispo.
  - c. The RTA 31-Day Pass will be valid for travel on both RTA regional and local Paso Express fixed routes. The current pass prices are \$44.00 regular and \$22.00 discounted, which is slightly lower than Paso's 31-Day Pass (\$45.00 regular and \$22.50 discounted).
  - d. Only the current Regional Day Pass will be available (\$5.00 regular – no discounted passes). The Paso Express Daily Pass (currently \$3.50 and \$1.75 discounted) will be eliminated.
4. Bus Operators: RTA has preliminarily agreed with our labor union to maintain two separate seniority lists so that Bus Operators hired from the ranks of current Paso Express and Atascadero El Camino Shuttle services can bid first on local

fixed route services in Paso Robles. Even though all RTA Bus Operators will be trained to operate any service in the RTA program, it is understood that local expertise will help smooth the transition. After one year of service, the two seniority lists will be merged into one.

5. Vehicles and Equipment: All existing Paso Express, Paso Dial-A-Ride, and Atascadero El Camino Shuttle vehicles will be transferred to RTA upon the consolidation. Local Paso Robles vehicles will continue to use the burgundy/black livery and Paso Express logos – at least until the medium-duty fixed route vehicles are ready for replacement in 6 to 10 years. At that time, we will work with local officials to determine if standard heavy-duty buses should be utilized and potentially shared system-wide with RTA regional services (that could reduce spare bus needs between the two systems).

### **Process**

Pursuant to RTA's August 2010 Service Change Policy , RTA has conducted public meetings as follows:

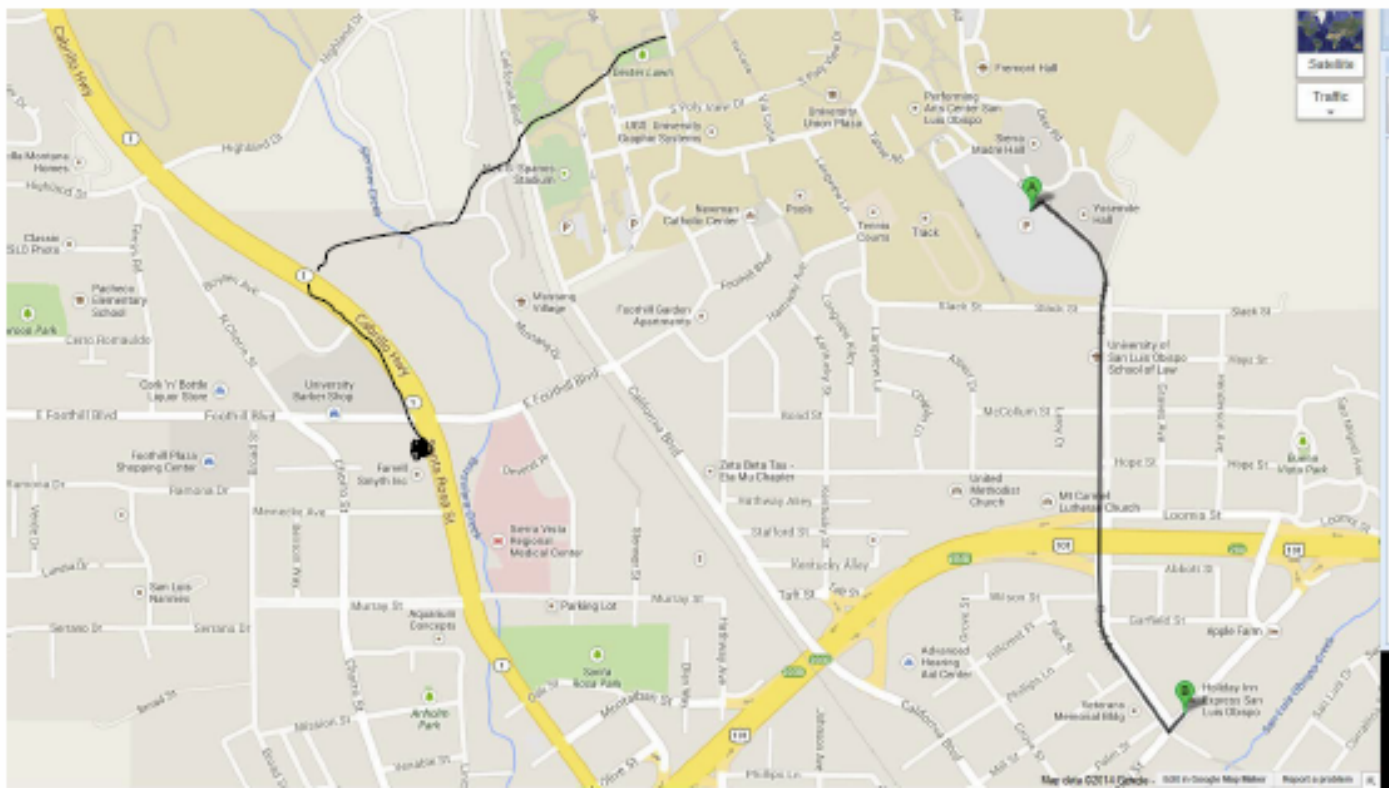
RTAC on January 15

Public Meetings

- Paso: Cuesta North, downtown and Oak Park Housing, February 12<sup>th</sup>, 2014
- Atascadero: downtown City Hall and California Manor (10165 El Camino Real), February 13<sup>th</sup>.
- Cal Poly: February 18<sup>th</sup>: 11:30-1:30pm at AFD Project Room 01-133

### **Staff Recommendation**

Authorize the service changes and fare adjustments as proposed to Route 9 to be effective on Sunday June 1, 2014.



**#3: Walk and RTA connections - From Kennedy, walk to RTA (about 0.8 miles) connect to Route #12 along Santa Rosa (at :20 past) –then connect to route #9.**

**#4 Take SLO Transit #4 from Kennedy at :23 past (arrives downtown at :35) and connect with RTA #9. Not a very good option - Arrives a little too late for :33 departures but we can do a 5 minute courtesy hold.**

**#1: Walk distance to the PAC is 0.8 miles (14 minutes)**

**#2: Transfer to SLO Transit #5 – walk 1.5 blocks from Monterey at Grand to Mill at Grand. RTA drops at about :20 past and SLO Transit picks up about 5 minutes later, at :25. Same time during the week and weekend. City ends at 6:50pm.**



San Luis Obispo Regional Transit Authority  
Executive Committee Meeting  
Minutes 12/11/2013  
C-1

Members Present: Frank Mecham, President  
Shelly Higginbotham, Vice President  
Fred Strong, Past President

Members Absent:

Staff Present: Geoff Straw, Executive Director  
Anna Mafort-Lacy, Administrative Assistant  
Tim McNulty, County Counsel

Also Present: Ron DeCarli, SLOCOG  
Pete Rodgers, SLOCOG  
Aida Nicklin, SLOCOG  
Eric Greening, Atascadero

**1. Call to Order and Roll Call:**

**President Frank Mecham** called the meeting to order at 10:00 a.m. Silent Roll Call was taken and a quorum was present.

**2. Public Comments:**

**Mr. Eric Greening**, Atascadero, noted labor negotiations are getting underway and wanted to make sure they are as fair and as close as possible to what the employees deserve within the budget. He observed morale seems to be good among drivers on the buses.

**3. Information Items**

A. Information Items:

A-1 Executive Director's Report

**Mr. Straw** said he could not present the year-to-date financial and operating budget as the state audit begins tomorrow for both RTA and South County Transit, and staff has not had time to complete the documents – but they will be ready for the January 8<sup>th</sup> Board meeting.

Staff met with members of the City of Atascadero regarding the North County consolidation. They will take the agreement to their January 14<sup>th</sup> City Council meeting. RTA will bring it to our Board for adoption on January 8. Paso Robles recently suggested some changes. We are taking different tactics for each city.

**Past President Fred Strong** inquired if Paso Express will be administered similar to that of South County Transit. Will there be an oversight committee? **Mr. Straw** said the City is taking a step back and wants RTA to manage and administer all of it. **Mr. Tim McNulty, County Counsel**, said staff proposed having an oversight committee, but Paso Robles City staff members did not want to establish one. **Mr. Straw** said the City of Atascadero still wants to have some citizen input and a mechanism for taking this information. **Past President Strong** suggested this should be vetted with City Council, as they usually like to have some policy oversight. **Mr. Straw** said they are moving forward and this will be presented to the Paso Robles City Council on January 7.

**Vice President Shelly Higginbotham** asked if staff can bring these agreements to the Board if they haven't yet been approved by the two city councils. **Mr. Straw** said we could, and we will probably ask for authorization to make any minor tweaks to the agreements if needed. We are likely to also have a special meeting in February.

Several aging Runabout vehicles are in maintenance due to engine failures and other issues. The Board authorized staff to purchase four replacements buses at the May 2013 meeting. The bids are due on the consortium on January 18. Sometime in February we will likely be able to award a contract to a successful bidder to build these vehicles. We should have them about 90 days later.

The San Luis Obispo Council of Governments (SLOCOG) recommended RTA be awarded a Congestion Mitigation Air Quality (CMAQ) grant to fund two over-the-road coaches and operations for three years. These will be used strictly for new express services on the US 101 corridor. We will order these once we get the authority to do so. **Mr. Ron DeCarli**, SLOCOG, said this will be presented to the SLOCOG Board for final action in February. He expected approval in May 2014.

RTA staff created a white paper on the development of fund reserves. We don't currently have a reserve fund policy and we discussed the need to develop one at a meeting earlier this year. This will be presented at the January 8 meeting.

Staff continues to work with a real estate consultant to identify potential properties available for acquisition for a long-term operations facility. This item will be presented in closed session at the January 8 Board meeting.

RTA began negotiations to amend the collective bargaining agreement (CBA). The next meeting is Friday. We received economic proposals last night at 11 p.m. We will enter these into the spreadsheet and see how it looks.

**Mr. Straw** concluded the Executive Directors report.

**Mr. Greening** pointed out the over-the-road coaches have wonderful capacity to seat passengers. However they are awkward for riders using bicycles and wheelchairs. Will we say no to bicycles and wheelchairs and refer them to other express services or will we accommodate them? How will this be handled?

**Mr. Straw** said we cannot say no to wheelchairs and these buses are no worse for wheelchair users than the high-floor buses currently in our fleet. The lift is located further in the back of the bus, and it takes about the same amount of time to load them. Regarding bicycles, we could put them in the belly of the bus, but it takes a long time. We are watching two pilot programs in the state that have bike racks on the front of the bus and will bring back some policy decisions once we get feedback from the agencies that are piloting these bike racks, as well as after we hear from the California Highway Patrol if we will be allowed to do so as well.

#### A-2 RTA Reserve Policy

**Mr. Straw** presented preliminary recommendations for implementing a formal RTA capital reserve policy. TDA requires 25% upfront operating revenues in reserves. This is budgeted annually and is statutory.

He outlined five types of reserve funds: Cash flow, Capital projects, operating, budget stabilization and facility rehabilitation/replacement. Each reserve fund balance that is established should be reviewed annually in order to reflect the most current financial information available. We don't currently have an operating reserve budget in place. The Industry standard best practices for operating reserves are to maintain at least 5-15% of the annual operating budget. **Mr. Straw** suggested combining the operating and budget stabilization reserve funds together but pointed out there are several different options to could be utilized over the next 3-4 years.

**Past President Strong** inquired at what percent staff would like to build the reserves. **Mr. Straw** said this is something that needs to be discussed with the Board. Staff is looking for input from the cities regarding what type of reserves they have in place.

**Mr. DeCarli** stated efforts to obtain the federal discretionary funds SLOCOG for RTA, South County Transit and San Luis Obispo Transit have been very successful. However, new FTA money available is \$350,000 and a bus requires \$400,000 in FTA funds. Suggesting a match just doesn't go far enough. On the state level, administrators are looking at a potential vehicle license fee that would help fund transit vehicles. Typically when looking at most formulas, we are seeing a nominal amount of available funds. I strongly support establishing a reserve with a more substantial amount of around 20%. Mr. DeCarli noted TDA funds have increased and now is the time to look at funding this policy.

**Mr. Straw** said he would like to discuss a 15% operating reserve. He said staff will seek input from the Board at the January meeting and bring a final recommendation to the March 2014 meeting as part of the budget assumptions.

**President Mecham** suggested getting information from each of the jurisdictions on how this will affect them. He said he fully supports having a reserve fund, but also cautioned that sometimes people will question why an organization is not spending it when the reserves grow too large. It's a bit of a double-edged sword.

**Mr. Pete Rodgers**, SLOCOG, suggested looking at an investment policy of some sort to be established in conjunction with a reserve savings fund.

#### **4. Action Items**

##### **B-1 Consolidation of Paso Robles Transit Services**

**Mr. Straw** outlined the draft consolidation plan of Paso Robles transit services, based upon the North County Transit Plan adopted by the SLOCOG Board in June 2012. The document is based upon the agreement we have in place with the County for services. It has since changed significantly and the revised documents went to the City of Paso Robles last night. The document included in the agenda basically has language indicating we are a contractor providing services, but the City of Paso Robles officials said they would like to step away from this kind of model.

**Past President Strong** reiterated he would still like to have some sort of policy oversight or advisory committee similar to that of South County Transit. He noted Paso Express Route C will be consolidated into Route 9, making this a much longer route. Who will be included in an advisory board?

**President Mecham** asked for clarification regarding Item number 4, Transfer of funds. Is this a one-time or ongoing charge? **Mr. McNulty** said this is a one-time occurrence.

**Mr. Straw** pointed out budget for this consolidation will be kept separate from the regional service.

**Mr. DeCarli** agreed that there needs to be some type of policy committee. It's pertinent to the success of this program. The city will retain significant savings as a result of this consolidation. That savings will continue. **Mr. DeCarli** discussed how the consolidation may affect TDA funds to the city. **Mr. Straw** said he only wants to claim the transit portion of TDA funds, leaving the rest to the City for streets, roads, bicycle paths and such.

**Vice President Higginbotham** asked if presenting this at the January 8 Board meeting might be too premature.

**Past President Strong** surmised not everyone is currently in the discussion that needs to be included. He did not think the issue was properly vetted yet.

**Mr. DeCarli** thought these concerns would be resolved on the staff level before the January meeting. **Mr. Straw** agreed to jointly contact the city manager of Paso Robles with **Mr. DeCarli**.

**Mr. Greening** thought the RTA Board should see the contract last and suggested being prepared to have a small special meeting in February.

**Mr. Rodgers** said we have an existing MOU between the cities, SLOCOG and RTA that establishes a programming technical committee and a dispute resolution committee of policymakers. He suggested there is a framework for policy member input. We could do something with the MOU to recognize that policy member committee and recommend 2-3 meetings per year.

## **5. Consent Agenda Items**

### **C-1 Executive Committee Meeting Minutes of October 16, 2013**

**Vice President Higginbotham** moved to approve Item C-1 and **Past President Strong** seconded. The motion passed on a voice vote.

## **6. Agenda Review:**



**Mr. Straw** reviewed the Board agenda for the Joint Board meeting of January 8, 2014. We will add item B-2 for the Atascadero consolidation, presuming it is ready to go.

There will be three closed session items: The annual performance evaluation, an update on the labor negotiations, and facility negotiations.

**Mr. Greening** asked if this will be a session where the Board will likely vote on a contract, as the current agreement expires at the end of January. **Mr. Straw** said he will probably ask the Board to continue with the existing Collective Bargaining Agreement (CBA) should negotiations not be fully agreed upon by the end of the month.

7. **Closed Session Items:**

None

8. **Open Session:**

None

9. **Adjournment:** **President Mecham** adjourned the meeting at 10:37 a.m.

Respectfully Submitted,

Acknowledged by,

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Anna Mafort-Lacy  
Administrative Assistant

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Frank Mecham  
RTA President

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**March 5, 2014**

**STAFF REPORT**

**AGENDA ITEM:** C-2

**TOPIC:** Customer Perception Survey Report

**PRESENTED BY:** Geoff Straw, Executive Director

**STAFF RECOMMENDATION:** Accept as Information

**BACKGROUND/DISCUSSION:**

RTA has wrapped up its first comprehensive RTA Customer Perception Survey, which was conducted throughout the months of October and early-November. This effort included:

1. An employee survey,
2. A Rider Survey for RTA, Runabout and South County Transit customers, and
3. An Internet-based stakeholder/Non-Rider survey.

Results were presented to RTAC on January 15, 2014. In addition, staff intends to use the findings from this survey effort to assist us in updating the RTA 2012-14 Strategic Business Plan that will occur in the latter part of FY13-14.

Five-year Short Range Transit Plans provide overall service benchmark data, but a more frequent review is necessary to measure and report on specific Strategic Plan Objectives. This is the first in-house survey that RTA has completed without the use of consultants. RTA plans to complete subsequent surveys every other year. The 2013 RTA and SCT Customer Perception survey effort served three main purposes:

1. Collect relevant information (such as travel patterns) that can then be compared to survey results from previous perception surveys,
2. Address the qualitative objectives in the RTA 2012-14 Strategic Business Plan, and
3. Create benchmarks for measurable performance standards in RTA's Strategic Business Plan.

A number of conclusions were drawn, and the following key findings are provided in the attached report:

RTA Rider Survey

- Over 1/3 of riders are students

- 31% of riders board and/or de-board the bus in the City of San Luis Obispo, Cal Poly, or Cuesta College
- 27% of riders said that they would not be able to make their trip if not for RTA services
- 67% of riders have been riding RTA for more than one year
- Nearly 2/3 of riders ride four days a week or more
- All but one aspect of RTA services (crowding on buses) rated 3.0 out of 4 or higher
- Low cost is the number one reason riders use RTA services
- On-time performance/reliability is the most importance service attribute with a 3.7 out of 4

#### RTA Employee Survey

- 54% of employees currently use RTA services
- Value of new buses was the highest rated aspect of RTA services with a 3.7 out of 4
- Employees think on-time performance/reliability is the most important to customers
- 56% of employees think higher wages will improve the length of employment for RTA employees

#### **Staff Recommendation**

Accept the draft revised RTA Runabout No-Show Policy as an information item.



# **San Luis Obispo Regional Transit Authority**

## **2013 Customer Perception Survey**



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## Table of Contents

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	Page
<b>EXECUTIVE SUMMARY .....</b>	<b>1</b>
BACKGROUND .....	1
PURPOSE .....	1
<i>2012-2014 Strategic Business Plan.....</i>	<i>1</i>
<i>Comparison with 2010 Short Range Transit Plan Survey .....</i>	<i>2</i>
SIGNIFICANT FINDINGS.....	3
BIASES OF THE SURVEY PROCESS.....	4
<b>RTA RIDER SURVEY .....</b>	<b>5</b>
SURVEY METHODOLOGY .....	5
SURVEY RESULTS.....	5
<i>Please Tell Us About You .....</i>	<i>6</i>
<i>Perception of RTA Services .....</i>	<i>13</i>
<i>Transportation Funding .....</i>	<i>15</i>
<b>RTA EMPLOYEE SURVEY .....</b>	<b>19</b>
SURVEY METHODOLOGY .....	19
SURVEY RESULTS.....	19
<i>Please Tell Us About You .....</i>	<i>19</i>
<i>Perception of RTA Services .....</i>	<i>22</i>
<i>Strategic Business Plan Standards.....</i>	<i>24</i>
<b>SCT RIDER SURVEY .....</b>	<b>28</b>
SURVEY METHODOLOGY .....	28
SURVEY RESULTS.....	28
<i>Please Tell Us About You .....</i>	<i>28</i>
<i>Perception of SCT Services .....</i>	<i>36</i>
<i>Transportation Funding .....</i>	<i>38</i>

## Table of Tables

---

	Page
TABLE 0.1: COMPARISON OF TRAVEL MODES TO BUS STOPS.....	2
TABLE 0.2: COMPARISON OF LENGTH OF USE.....	2
TABLE 0.3: COMPARISON OF TRIP PURPOSE .....	3
TABLE 0.4: COMPARISON OF EMPLOYMENT STATUS.....	3
TABLE 0.5: COMPARISON OF EXPERIENCE RATING .....	3
TABLE 1.1: SUMMARY OF RTA RIDER DATA COLLECTION .....	5
TABLE 3.1: SUMMARY OF SCT RIDER DATA COLLECTION .....	28

## Table of Figures

---

	Page
FIGURE 1.1: Q15. WHAT IS YOUR AGE? .....	6
FIGURE 1.2: Q14. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EMPLOYMENT STATUS?.....	7
FIGURE 1.3: Q1. WILL YOU BE TRAVELING ROUNDTrip ON RTA TODAY?.....	7
FIGURE 1.4: COMPARISON OF RESPONSES TO Q3 AND Q4.....	8
FIGURE 1.5: COMPARISON OF RESPONSES TO Q3A AND Q4A .....	8
FIGURE 1.6: ORIGIN AND DESTINATION OF RTA RIDERS .....	9
FIGURE 1.7: SAN LUIS OBISPO ORIGIN/DESTINATION BREAKDOWN .....	9
FIGURE 1.8: Q7. WHAT IS THE MAIN PURPOSE OF YOUR TRIP TODAY?.....	10
FIGURE 1.9: Q2. HOW WOULD YOU MAKE THIS TRIP IF RTA WAS NOT AVAILABLE? .....	10
FIGURE 1.10: Q8. HOW DID YOU PAY FOR YOUR FARE TODAY? .....	11
FIGURE 1.11: Q9. HOW LONG HAVE YOU BEEN RIDING RTA?.....	11

FIGURE 1.12: Q10. HOW OFTEN DO YOU RIDE RTA? .....	12
FIGURE 1.13: Q11. HOW DID YOU FIRST HEAR ABOUT RTA?.....	12
FIGURE 1.14: Q12. HOW DO YOU GET MOST OF YOUR INFORMATION ABOUT RTA? .....	13
FIGURE 1.15: Q17. PLEASE RATE THE FOLLOWING ASPECTS OF RTA .....	14
FIGURE 1.16: Q18. PLEASE RATE THE REASONS YOU USE RTA SERVICES. ....	15
FIGURE 1.17: Q19. PLEASE RATE THE SERVICE ATTRIBUTES THAT ARE MOST IMPORTANT TO YOU. .	15
FIGURE 1.18: Q20. HOW SHOULD THE COUNTY FUND TRANSPORTATION IMPROVEMENTS? .....	16
FIGURE 1.19: Q21. WHAT TYPE OF TAX, IF ANY, WOULD BE MOST ACCEPTABLE FOR TRANSPORTATION IMPROVEMENTS? .....	17
FIGURE 1.20: Q22. PLEASE RATE THE SATISFACTION WITH ALTERNATIVE MODES OF TRANSPORTATION WITHIN THE COUNTY. ....	17
FIGURE 2.1: Q1. WHAT IS YOUR CURRENT POSITION AT RTA? .....	20
FIGURE 2.2: Q1A. IF OPERATOR, WHICH SERVICE(S)?.....	20
FIGURE 2.3: Q2. DO YOU CURRENTLY USE ANY RTA SERVICES? .....	20
FIGURE 2.4: Q2A. WHICH ONE(S)? .....	21
FIGURE 2.5: Q2B. HOW OFTEN DO YOU RIDE? .....	21
FIGURE 2.6: Q2C. WHAT IS THE GENERAL PURPOSE OF YOUR TRIPS TAKEN USING RTA SERVICES? ..	22
FIGURE 2.7: Q3. PLEASE RATE YOUR PERCEPTIONS ABOUT RTA SERVICE .....	23
FIGURE 2.8: Q4. PLEASE RATE THE REASONS YOU BELIEVE CUSTOMERS USE RTA SERVICES. ....	24
FIGURE 2.9: Q5. PLEASE RATE THE SERVICE ATTRIBUTES THAT YOU THINK ARE MOST IMPORTANT TO CUSTOMERS. ....	24
FIGURE 2.10: Q9. TRAINING/DEVELOPMENT PROGRAMS PARTICIPATION AND EXPERIENCE. ....	26
FIGURE 2.11: Q10. PLEASE RATE THE STATE OR REPAIR OF RTA FACILITIES.....	26
FIGURE 2.12: Q11. PLEASE RATE THE STATE OR REPAIR OF RTA PASSENGER FACILITIES.....	27
FIGURE 3.1: Q15. WHAT IS YOUR AGE?.....	29



FIGURE 3.2: Q14. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR EMPLOYMENT STATUS?.....	29
FIGURE 3.3: Q1. WILL YOU BE TRAVELING ROUNDTRIP ON SCT TODAY? .....	30
FIGURE 3.4: COMPARISON OF RESPONSES TO Q3 AND Q4.....	31
FIGURE 3.5: COMPARISON OF RESPONSES TO Q3A AND Q4A .....	31
FIGURE 3.6: ORIGIN AND DESTINATION OF SCT RIDERS.....	32
FIGURE 3.7: Q7. WHAT IS THE MAIN PURPOSE OF YOUR TRIP TODAY?.....	32
FIGURE 3.8: Q2. HOW WOULD YOU MAKE THIS TRIP IF SCT WAS NOT AVAILABLE? .....	33
FIGURE 3.9: Q8. HOW DID YOU PAY FOR YOUR FARE TODAY? .....	33
FIGURE 3.10: Q9. HOW LONG HAVE YOU BEEN RIDING SCT? .....	34
FIGURE 3.11: Q10. HOW OFTEN DO YOU RIDE SCT? .....	34
FIGURE 3.12: Q11. HOW DID YOU FIRST HEAR ABOUT SCT?.....	35
FIGURE 3.13: Q12. HOW DO YOU GET MOST OF YOUR INFORMATION ABOUT SCT? .....	35
FIGURE 3.14: Q17. PLEASE RATE THE FOLLOWING ASPECTS OF SCT .....	36
FIGURE 3.15: Q18. PLEASE RATE THE REASONS YOU USE SCT SERVICES. ....	37
FIGURE 3.16: Q19. PLEASE RATE THE SERVICE ATTRIBUTES THAT ARE MOST IMPORTANT TO YOU..	38
FIGURE 3.17: Q20. HOW SHOULD THE COUNTY FUND TRANSPORTATION IMPROVEMENTS? .....	38
FIGURE 3.18: Q21. WHAT TYPE OF TAX, IF ANY, WOULD BE MOST ACCEPTABLE FOR TRANSPORTATION IMPROVEMENTS? .....	39
FIGURE 3.19: Q22. PLEASE RATE THE SATISFACTION WITH ALTERNATIVE MODES OF TRANSPORTATION WITHIN THE COUNTY.....	39

## Executive Summary

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### Background

This is the first time San Luis Obispo Regional Transit Authority (RTA) has conducted an in-house perception survey as part of its Strategic Business Plan in order to benchmark (1) travel patterns, (2) perceptions of RTA services, and (3) demographic information of riders and employees. The previous system-wide rider survey was completed as part of RTA's 2010 Short Range Transit Plan however; the 2013 Customer Perception Survey was expanded to include RTA employees, South County Transit (SCT) riders and employees, and non-riders as well. The survey process began in September and ended in November of 2013; a little over five years after the 2010 Short Range Transit Plan's surveys were collected. Below is a list of the seven different groups surveyed throughout the data collection process. The groups in **bold** are the ones that are included in this report.

- **RTA riders**
- **RTA employees**
- RTA runabout riders
- **SCT riders**
- SCT employees
- RTA and SCT riders (online survey instrument)
- Non-riders (online survey instrument)

Questions on the survey instruments were tailored for each group. For more information, see Appendix A for examples of survey instruments. Only three of the seven survey groups were included in the report because the other four did not obtain a sufficient number of survey responses for the data to yield significant results. See Appendix B for the initial data analysis for the RTA runabout riders survey. See Appendix C for the initial data analysis for the RTA and SCT online rider survey. The non-rider online survey did not yield and completed surveys and the SCT employees survey yielded four surveys. The SCT employee survey data was coded but not analyzed.

### Purpose

The purpose of the surveys varies from the group to group. RTA and SCT rider surveys serve two main purposes: (1) collect relevant information such as travel patterns that can then be compared to survey results from previous perception surveys and (2) several questions will act as benchmarks for measurable objective standards in the recently approved RTA 2012-2014 Strategic Business Plan. The RTA employee survey serves two main purposes: (1) collect information regarding customer perceptions that can be compared to the RTA rider survey results and (2) several questions will act as benchmarks for measurable objective standards in the 2012-2014 Strategic Business Plan.

### *2012-2014 Strategic Business Plan*

The 2012-2014 Strategic Business Plan (SBP) provides standards that can be quantified and reported on a regular basis. All the standards outlined in the Plan relate to broader goals and objectives that RTA has developed in order to accomplish their mission statement. The standards set forth in the

SBP are divided into six sections: (1) Service Quality and Efficiency (2) Revenue and Resources, (3) Safety, (4) Human Resources, (5) Fleet and Facility, and (6) Leadership. For more information, see Appendix D for a copy of the RTA's 2012-2014 Strategic Business Plan.

The following is an example of how specific questions on the survey instruments provide the data necessary to measure some of the standards found in the Strategic Business Plan. For more information, see Appendix F for a complete list of the survey questions and the corresponding standards that the question response data is intended to measure.

Standard 4 under the Fleet and Facility section states, "Achieve an 80% favorable rating of bus stop appearance by customers and the communities we serve." In order to report on Standard 4 using measurable objectives, RTA riders were asked to rate the appearance of bus stops using a 1 to 4 scale, 1 being poor and 4 being excellent (See Figure 1.15). Of the 302 RTA riders surveyed, 248 rated the appearance of bus stops for an average rating of 3.2 out of 4.0. When 3.2 is calculated as a percentage, it is equivalent to 80% out of 100%. This means RTA riders' opinions of the appearance of bus stops meets Standard 4 of the Fleet and Facility section of the Strategic Business Plan.

### *Comparison with 2010 Short Range Transit Plan Survey*

As mentioned above, one of the main purposes of the rider surveys were to be able to compare results from this survey to previous perception surveys, specifically the 2010 Short Range Transit Plan (S RTP). Overall, the survey results from 2010 S RTP and the 2013 Customer Perception surveys were very similar with a few significant differences. The following are the significant results from the survey comparison. For more information, see Appendix E for a copy of the 2010-2013 survey comparison analysis.

Comparison of travel modes to bus stops from the 2010 S RTP and the 2013 Customer Perception Survey indicate that walking to the bus stops has increased about 7% over the 5 year period. Meanwhile park & ride and transfers, as a travel mode, have decreased by 7% and 5% respectively. See Table 0.1 below. Comparison of travel modes from bus stops did not yield any significant results.

**Table 0.1: Comparison of Travel Modes to Bus Stops**

Question #3 (2013) and Question #2 (2010) How did you get to the bus stop where you boarded the bus?	2010 Survey	2013 Survey	% Change
Walked	50.3%	57.4%	7.1%
Transferred from another bus	11.9%	6.7%	-5.2%
Park & Ride	13.6%	6.7%	-6.9%

Comparison of length of use indicates an increase of more than 10% among riders that have been using RTA services for more than 1 year. See Table 0.2 below.

**Table 0.2: Comparison of Length of Use**

Question #9 (2013) and Question #16 (2010) How long have you been riding RTA?	2010 Survey	2013 Survey	% Change
More than 1 year	56.3%	66.9%	10.6%

Comparison of trip purpose indicates a 7% decrease in work as the main trip purpose among current riders. See Table 0.3 below.

**Table 0.3: Comparison of Trip Purpose**

Question #7 (2013) and Question #4 (2010) What is the main purpose of your trip?	2010 Survey	2013 Survey	% Change
Work	41.5%	34.2%	-7.3%

Comparison of employment status indicates a significant decrease in employed riders of 15% which correlates with the decrease in work as the main trip purpose shown in Table 0.3 above. However, retired and student, as an employment status, increased 5% and 7% respectively over the same time period. See Table 0.4 below.

**Table 0.4: Comparison of Employment Status**

Question #14 (2013) and Question #24 (2010) Which of the following best describes your employment status?	2010 Survey	2013 Survey	% Change
Employed*	56.8%	41.5%	-15.3%
Retired	4.7%	10.3%	5.6%
Student	26.2%	33.5%	7.2%

\*2010 Short Range Transit Plan "Employed" number is a combination of full-time and part-time employment figures

Comparison of Experience rating indicates that there is only one aspect of RTA services that has increased or decreased more than 5%, on-time performance/reliability which increase over 12% over the 5 year period. See Table 0.5 below.

**Table 0.5: Comparison of Experience Rating**

Question #17 (2013) and Question #11 (2010) Please rate the following aspects of RTA by circling the number that best describes your experience. (1 to 4 scale)	2010 Survey	2013 Survey
d. On-time performance/Reliability	2.9	3.4

## Significant Findings

Below are the significant findings from the RTA rider, RTA employee, and SCT rider surveys. The comparison results shown above are considered significant but are omitted from this section.

### RTA Rider Survey

- Over 1/3 of riders are students
- 31% of riders board and/or de-board the bus in the City of San Luis Obispo, Cal Poly, or Cuesta College
- 27% of riders said that they would not be able to make their trip if not for RTA services
- 67% of riders have been riding RTA for more than 1 year
- Nearly 2/3 of riders ride 4 days a week or more
- All but one aspect of RTA services (crowding on buses) rated 3.0 out of 4 or higher
- Low cost is the #1 reason riders use RTA services
- On-time performance/reliability is the most importance service attribute with a 3.7 out of 4

### **RTA Employee Survey**

- 54% of employees currently use RTA services
- Value of new buses was the highest rated aspect of RTA services with a 3.7 out of 4
- Employees think on-time performance/reliability is the most important to customers
- 56% of employees think higher wages will improve the length of employment for RTA employees

### **SCT Rider Survey**

- Almost 1/3 of riders board and/or de-board the bus in the City of Pismo Beach
- 70% of riders pay with cash
- Almost 2/3 of riders have been riding for more than 1 year
- Over half of riders ride 2 to 3 days per week
- All aspects of SCT services rated 3.4 out of 4 or higher
- Convenience is the #1 reason riders use SCT services

### **Biases of the Survey Process**

There are two primary biases of the survey process: (1) there were no Spanish versions of the surveys available and (2) not all riders had an equal chance of being surveyed. Not having Spanish versions available was a larger issue with South County Transit riders than with other survey groups. The next customer perception survey should have a Spanish survey version available. Not all riders had an equal chance of being surveyed because trips that were surveyed were specifically chosen based on high ridership numbers and focused on commuter trips.

## RTA Rider Survey

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### Survey Methodology

RTA riders were surveyed in-person on various trips on routes 9, 10, and 12 beginning on Wednesday September 24<sup>th</sup>, 2013 and ending on Tuesday November 5<sup>th</sup>, 2013 for a total of 10 days. Two surveyors were tasked with administering the RTA rider surveys throughout the data collection process. Aside from the first day for training purposes, each surveyor rode the bus separately anywhere from two to eight hours each time. The surveyors typically started the data collection process at the City of San Luis Obispo Government Center RTA bus stop. The surveyor boarded the bus at the beginning of a trip, introduced himself to the driver, and then made an announcement to all riders on the bus about the survey before the bus left the bus stop.

After the first stop of any trip, the surveyor then asked each person that boarded the bus at each subsequent bus stop whether they would voluntarily complete a survey. If the rider agreed to complete a survey then the surveyor would hand them a (1) survey form, (2) a clipboard, and (3) a blue ink pen. The rider would then take the survey tools to their seat and complete the survey. After the rider completed the survey, the surveyor would come by and collect the survey tools from the rider. Table 1.1 below is a summary of the data collection including the number of surveys collected per day. The total number of surveys collected from RTA riders during the data collection process is 302 with an average of 30 surveys collected per day.

**Table 1.1: Summary of RTA Rider Data Collection**

Date	Day	Route #			# of Surveys Collected
		9	10	12	
Sept. 24 <sup>th</sup>	Tuesday	X	X	X	46
Sept. 25 <sup>th</sup>	Wednesday	X	X	X	50
Sept. 27 <sup>th</sup>	Friday	X		X	19
Sept. 28 <sup>th</sup>	Saturday	X			14
Oct. 4 <sup>th</sup>	Friday	X	X	X	41
Oct. 11 <sup>th</sup>	Friday	X	X	X	38
Oct. 24 <sup>th</sup>	Thursday		X		20
Oct. 25 <sup>th</sup>	Friday			X	9
Oct. 29 <sup>th</sup>	Tuesday	X		X	31
Nov. 5 <sup>th</sup>	Tuesday	X		X	34
<b>Totals</b>		<b>8</b>	<b>5</b>	<b>8</b>	<b>302</b>

### Survey Results

The RTA rider survey form is a two-sided form consisting of 23 total questions. The questions are separated into three sections: (1) Please Tell Us About You – questions about demographics, trip patterns, and information sources, (2) Perception of RTA Services – questions about customer satisfaction, and (3) Transportation Funding – questions about financing bus service in San Luis Obispo County.

## Please Tell Us About You

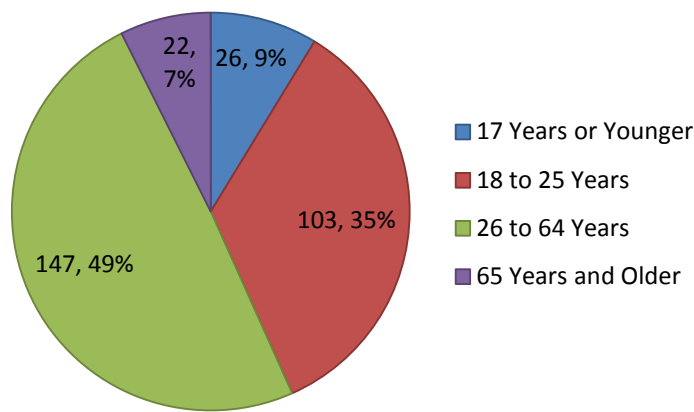
The first section consists of 16 total questions that focus on collecting information regarding the rider's bus trip he or she is making at the time he or she agreed to complete a survey as well as some demographic information about the rider. The only major issue with this section of the survey form uncovered during the data collection process is that questions 1-4 and 7-12 are side-by-side which led to some riders inadvertently skipping over the even numbered questions. For more information, see Appendix A for a copy of the RTA rider survey instrument.

### Demographic Profile

**Gender** Question #16 asks riders to indicate their gender. Of the 295 that answered, 173 (58.6%) indicated male and 122 (41.4%) indicated female.

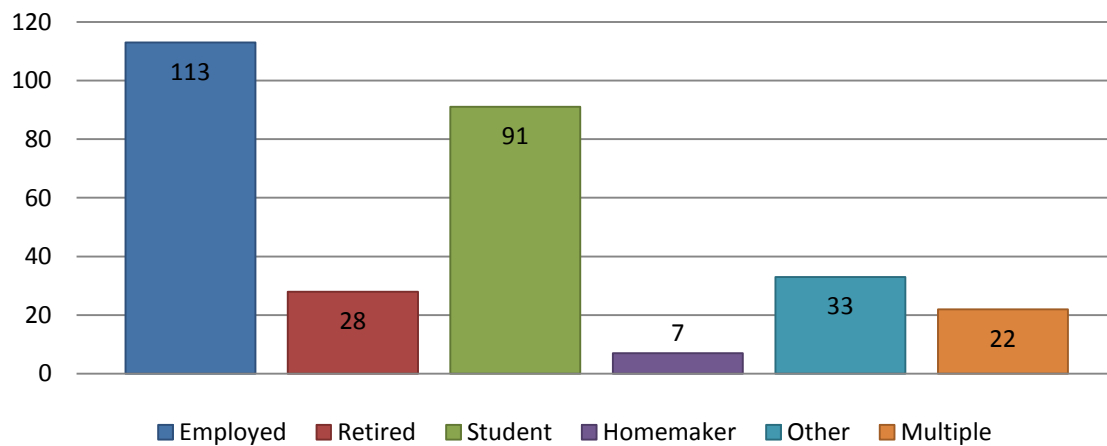
**Age** Question #15 asks riders to indicate their age. Of the 298 that answered, 147 (49.3%) indicated 26 to 64 years, 103 (34.6%) indicated 18 to 25 years, 26 (8.7%) indicated 17 years or younger, and 22 (7.4%) indicated 65 years and older. See Figure 1.1 below.

Figure 1.1: Q15. What is your age?



**Employment Status** Question #14 asks riders to indicate which option best describes their current employment status. Of the 294 that answered, 113 (38.4%) indicated Employed, 91 (31.0%) indicated Student, and 33 (11.2%) indicated Other. "Student" and "Homemaker" are included in this question because these are typically viewed as an alternative to employment. The riders that indicated "Other" did not specify their current employment status. See Figure 1.2 below.

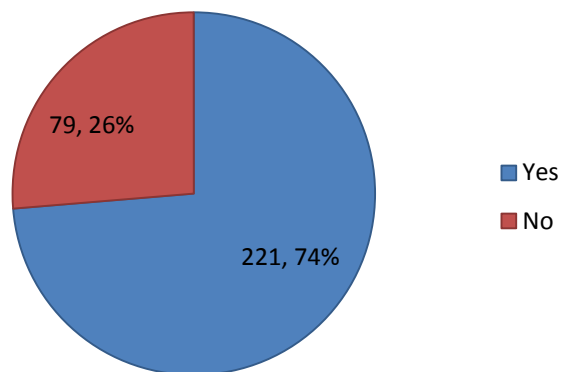
Figure 1.2: Q14. Which of the following best describes your employment status?



## Travel Patterns

**One-way vs. Roundtrip** Question #1 asks RTA riders to indicate if they will be traveling roundtrip on RTA buses that day. Of that 301 answered this question, 221 (73.2%) of riders indicated Yes. Some riders were confused on exactly how to answer this question. For example, if a rider was filling out a survey form on their return bus trip then they were in fact making a roundtrip using RTA services but the language in the question suggests that the roundtrip will occur sometime in the future. See Figure 1.3 below.

Figure 1.3: Q1. Will you be traveling roundtrip on RTA today?



**Travel Mode to/from bus stops** Question #3 asks riders to indicate how they got to the bus stop where they boarded the bus. Of the 290 riders that answered, 162 (55.9%) indicated Walked, 37 (13%) indicated Bicycle, and 36 (12.4%) indicated Dropped off. See Figure 3 below. Those that indicated “Transferred from another bus” were asked a follow-up question regarding which bus service they transferred from. Of the 11 that answered, 6 (54.5%) indicated SLO Transit, 2 (18.2%) indicated RTA, 1 (9.1%) indicated Santa Maria Area Transit (SMAT), 1 (9.1%) indicated South County Transit (SCT), and 1 (9.1%) indicated Atascadero Transit. See Figure 1.4 below.



Question #4 asks riders to indicate how they will get to their destination once they de-board (get off) the bus. Of the 250 riders that answered, 147 (58.8%) indicated Walk, 32 (12.8%) indicated Bicycle, and 26 (10.4%) indicated Transfer to another bus. See Figure 5 below. Those that indicated “Transfer to another bus” were asked a follow-up question regarding which bus service they will transfer to. Of the 17 that answered, 10 (58.8%) indicated SLO Transit, 4 (23.5%) indicated RTA, 2 (11.8%) indicated Atascadero Transit, and 1 (5.9%) indicated Santa Maria Area Transit (SMAT). None of the riders indicated that they will transfer to any of the South County Transit (SCT) bus routes. See Figure 1.5 below.

Figure 1.4: Comparison of Responses to Q3 and Q4

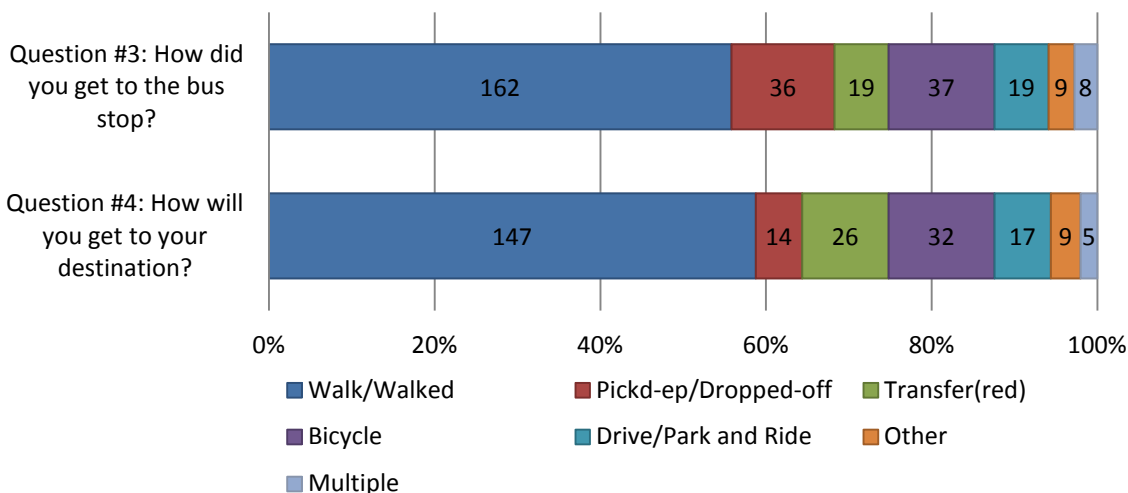
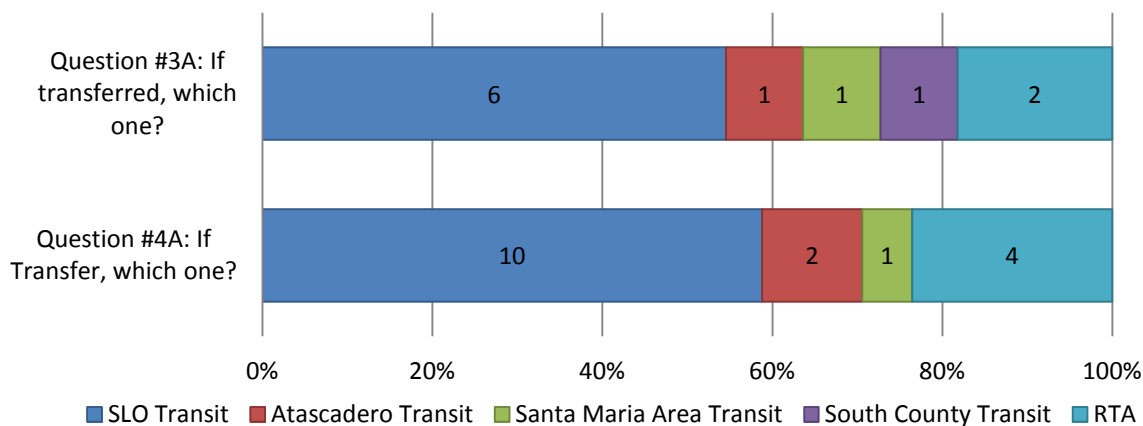


Figure 1.5: Comparison of Responses to Q3A and Q4A



**Origin and Destination** Question #5 asks riders to indicate which city or community did they board the bus. This is considered to be a rider’s origin. Of the 302 that answered, 81 (26.8%) indicated San Luis Obispo (SLO), 50 (16.6%) indicated Morro Bay/Los Osos, 46 (15.2%) indicated Atascadero, 40 (13.2%) indicated Five Cities, and 18 (6.0%) indicated Paso Robles. See Figure 1.6 below.

Question #6 asks riders to indicate which city or community will they de-board (get off) the bus. This is considered to be the rider’s destination. Of the 301 that answered, 104 (34.6%) indicated San Luis

Obispo (SLO), 34 (11.3%) indicated Santa Maria, 33 (11.0%) indicated Atascadero, 32 (10.6%) indicated Morro Bay/Los Osos, and 26 (8.3%) indicated Paso Robles. The purpose of separating the City of San Luis Obispo (SLO) into three categories is to differentiate between riders that boarded the bus at the Government Center bus stop compared to those that boarded at Cal Poly or in other areas of San Luis Obispo. See Figure 1.7 below.

Figure 1.6: Origin and Destination of RTA Riders

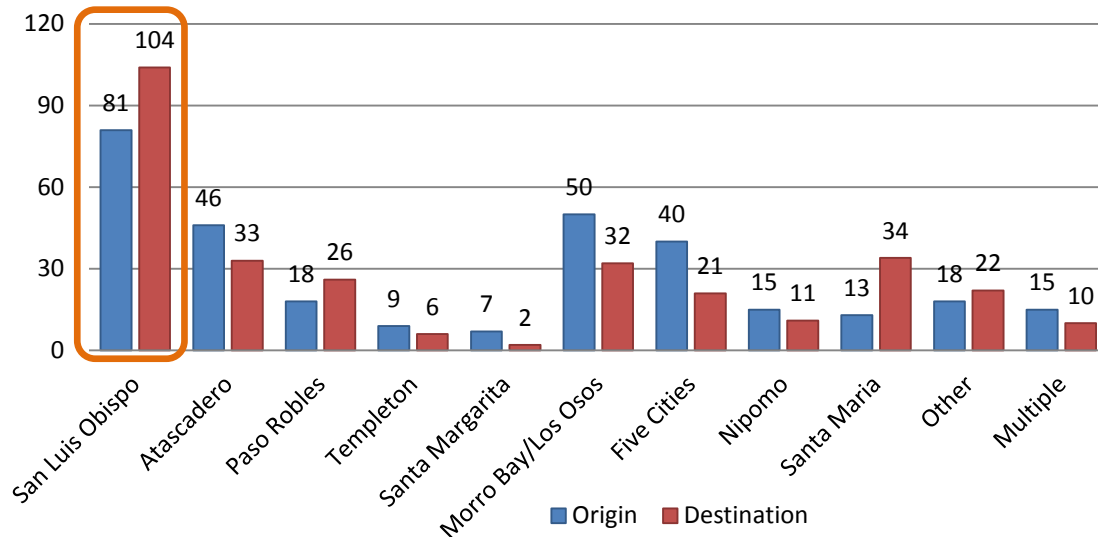
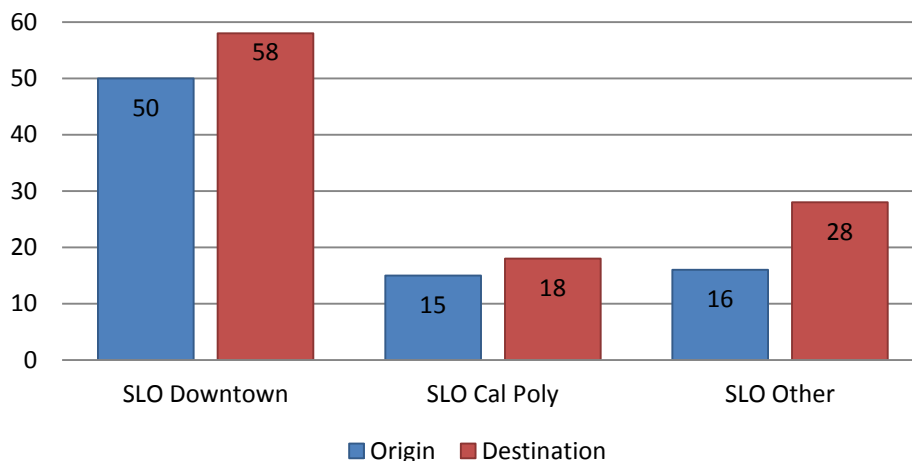
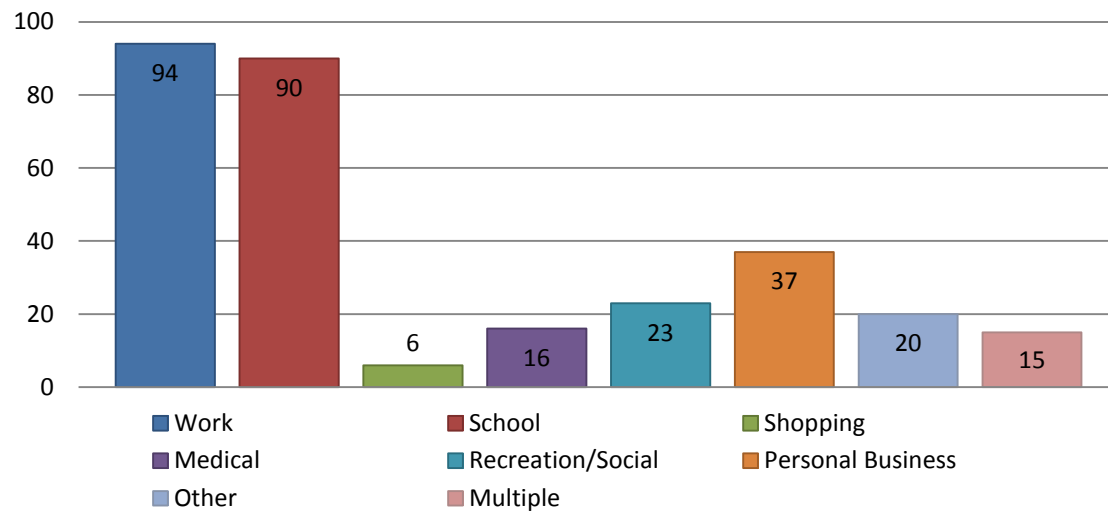


Figure 1.7: San Luis Obispo Origin/Destination Breakdown



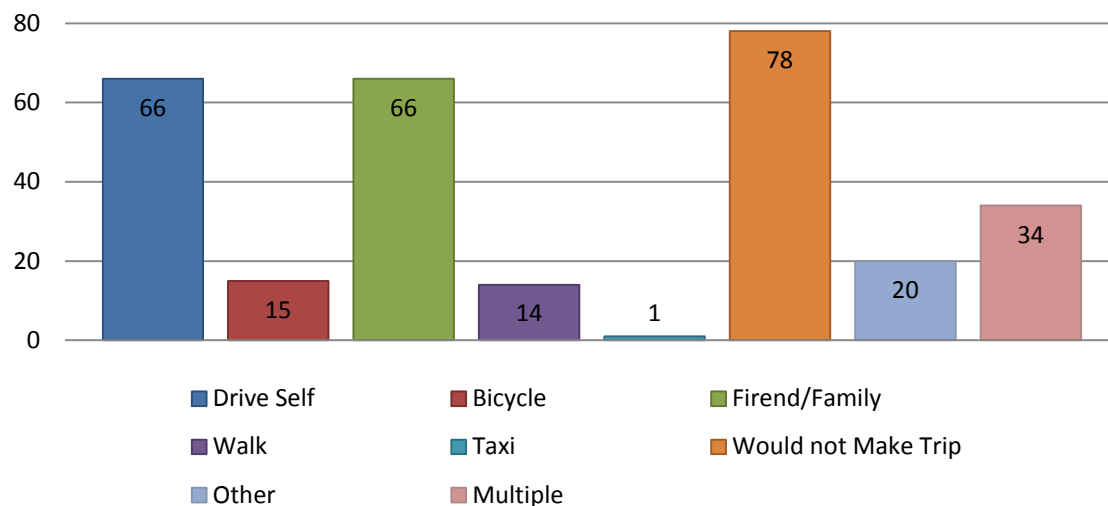
**Trip Purpose** Question #7 asks riders to indicate what the main purpose of their trip on the day they completed the survey. Of the 301 riders that answered, 94 (31.2%) indicated Work, 90 (29.9%) indicated School, and 37 (12.3%) indicated Personal Business. See Figure 1.8 below.

Figure 1.8: Q7. What is the main purpose of your trip today?



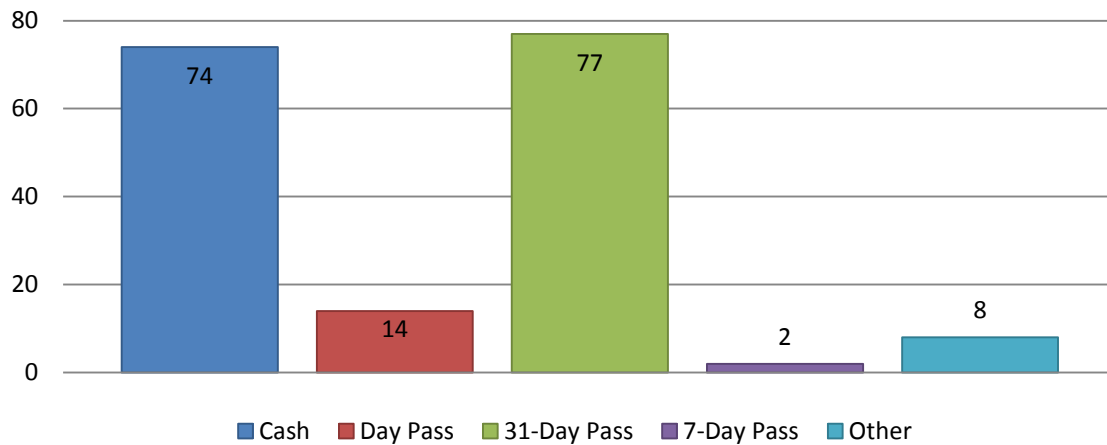
**Alternative Travel Modes** Question #2 asks riders to indicate how they would make the trip they were making at the time they agreed to complete a survey if RTA services were not available. Of the 294 riders that answered, 78 (26.5%) indicated Would not Make Trip, 66 (22.4%) indicated Drive self, 66 (22.4%) indicated Friend/family, and 54 (18.4%) riders indicated Other or some combination of the options listed. This suggests that the 26.5% of riders that indicated that they “Would not Make Trip” are dependent upon RTA services for that particular trip and possibly other trips they make using RTA services. See Figure 1.9 below.

Figure 1.9: Q2. How would you make this trip if RTA was not available?



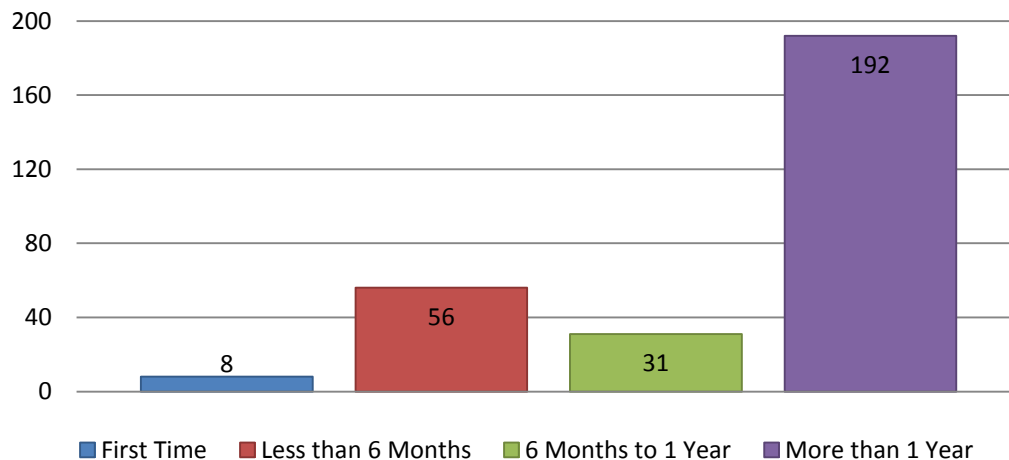
**Fare Payment** Question #8 asks riders to indicate how they paid their fare. Again, it is reasonable to assume that the layout of the survey form hindered RTA riders from noticing that Question #8 was a separate question unto itself resulting in the significant number of “No answer”. Of the 175 riders that answered, 77 (44%) indicated 31-Day Pass, 74 (42.3%) indicated Cash, and 14 (8.0%) indicated Day Pass. See Figure 1.10 below.

Figure 1.10: Q8. How did you pay for your fare today?



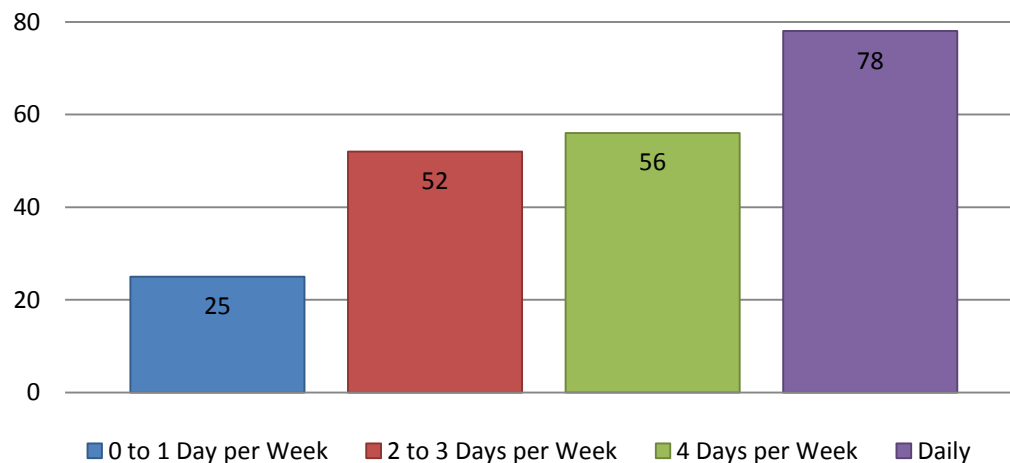
**Length of Use** Question #9 asks riders to indicate how long they have been using RTA services. Of the 287 that answered, 192 (66.9%) indicated More than 1 Year, 56 (19.5%) indicated Less than 6 Months, and 31 (10.8%) indicated 6 Months to 1 Year. According to the responses, over 2/3 of surveyed riders have been using RTA services for more than 1 year. See Figure 1.11 below.

Figure 1.11: Q9. How long have you been riding RTA?



**Trip Frequency** Question #10 asks riders to indicate how often they use RTA services. Of the 211 that answered, 78 (37.0%) indicated Daily, 56 (26.5%) indicated 4 Days per Week, and 52 (24.6%) indicated 2 to 3 Days per Week. Based on the rider responses, over 63% of riders use RTA services at least 4 days per week or more. See Figure 1.12 below.

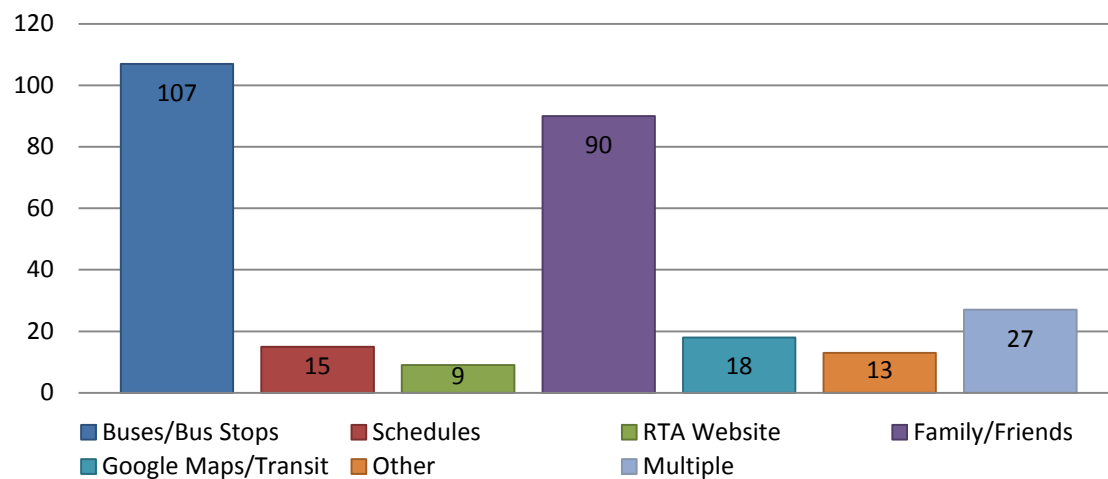
Figure 1.12: Q10. How often do you ride RTA?



### Information Sources/Marketing

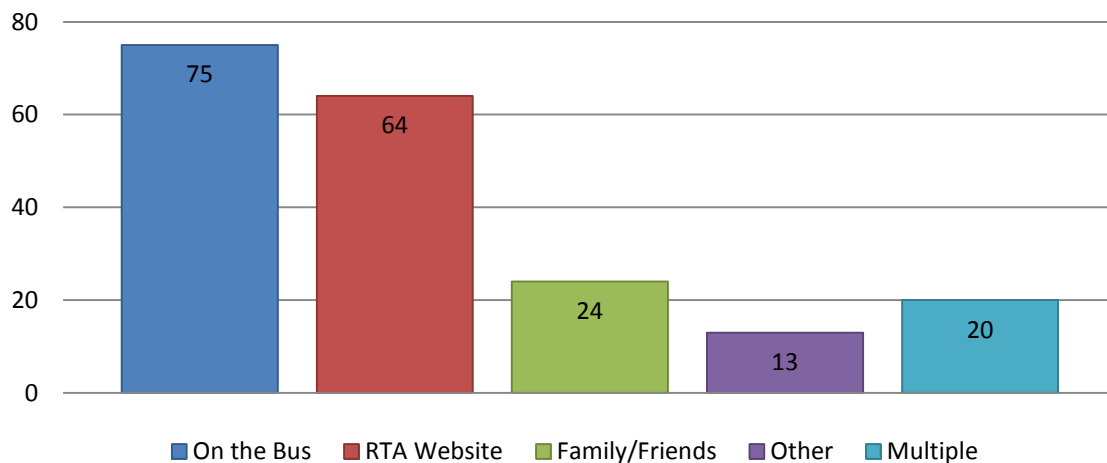
**Initial Information Source** Question #11 asks riders to indicate how they first heard about RTA. Of the 279 that answered, 107 (38.4%) indicated Buses/Bus Stops, 90 (32.3%) indicated Family/Friends, and 18 (6.5%) indicated Google Maps/Transit. See Figure 1.13 below.

Figure 1.13: Q11. How did you first hear about RTA?



**Usual Information Source** Question #12 asks riders to indicate how they get most of their information about RTA services. Of the 196 that answered, 75 (38.3%) indicated On the Bus, 64 (32.7%) indicated RTA Website, and 24 (12.2%) indicated Family/Friends. Based on the rider responses, 71.0% of riders use RTA buses or RTA website as their primary source of information regarding RTA services. See Figure 1.14 below.

Figure 1.14: Q12. How do you get most of your information about RTA?



**Desired Information Source** Question #13 is an open-ended response question that asks riders to write down what they think is the best way for RTA to tell people about their services. 241 riders answered this question. The most common responses include: fliers, television ads, internet advertising, word of mouth, and print/newspaper advertising. Advertising on the internet and/or posting relevant information on RTA's website was the number one response to this question. See Appendix G for a list of all the open-ended question responses. Below is a list of the most common rider responses and the frequency of the responses.

- Online/Internet/RTA Website (x 59)
- Television (x 44)
- Print/Fliers/Newspapers/Signs/Schedules (x 29)
- On bus/Bus Driver (x 23)
- Radio (x 20)
- Schools/Colleges (x 17)
- Bus Stops (x 19)
- Facebook/Social Media (x 12)
- Email/Mail/Texts (x 11)
- Word of Mouth (x 8)
- Mobile App (x 7)

### *Perception of RTA Services*

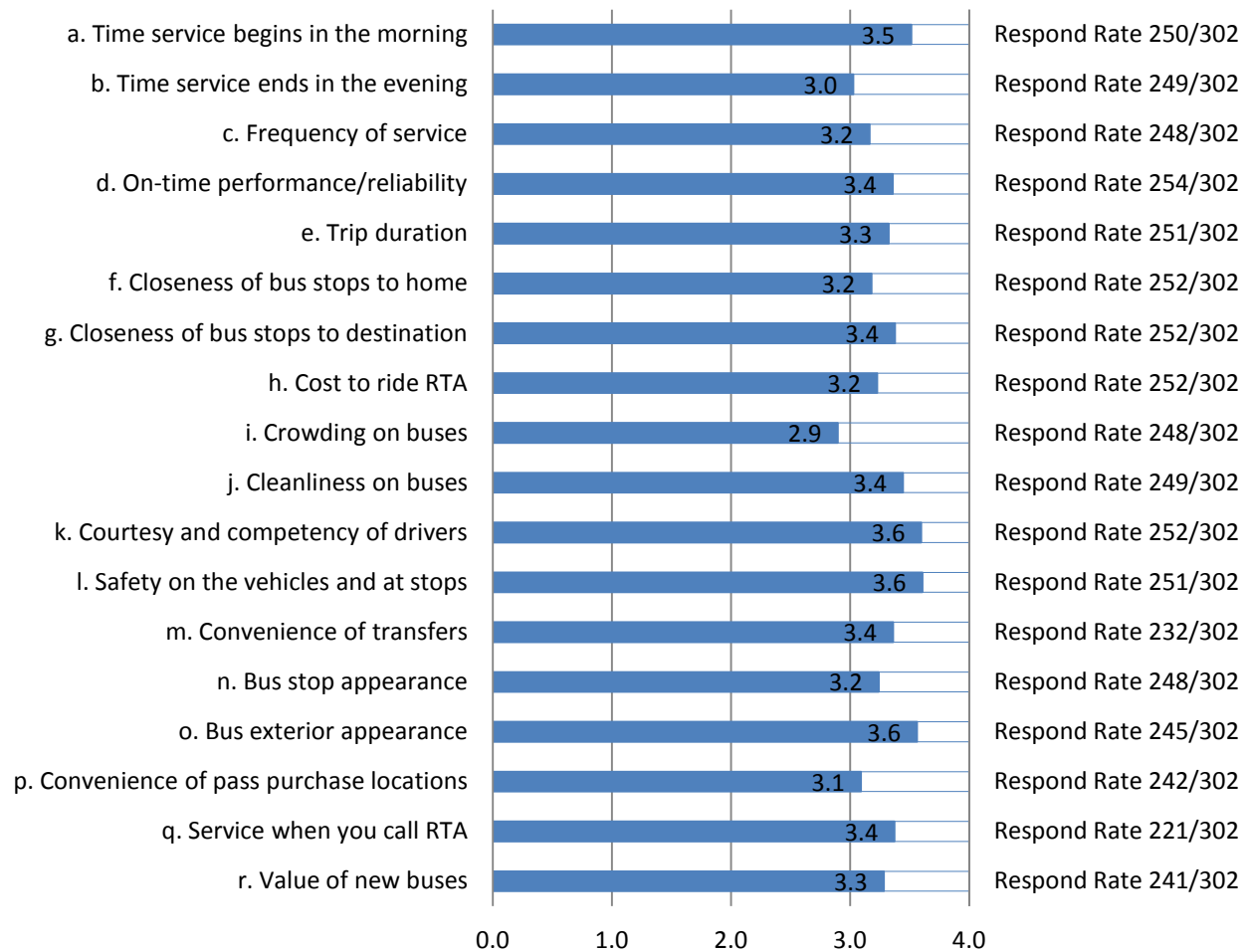
The second section consists of three total questions that focus on collecting information regarding the rider's perception of various aspects of RTA services.

### *Customer Satisfaction*

**Experience Rating** Question #17 of the RTA rider survey form lists 18 aspects of RTA services and then asks riders to rate the aspects on a scale of 1 to 4; 1 is Poor, 2 is Fair, 3 is Good, and 4 is Excellent. Responses to each aspect of RTA services ranged from 221 to 254. The three highest rated

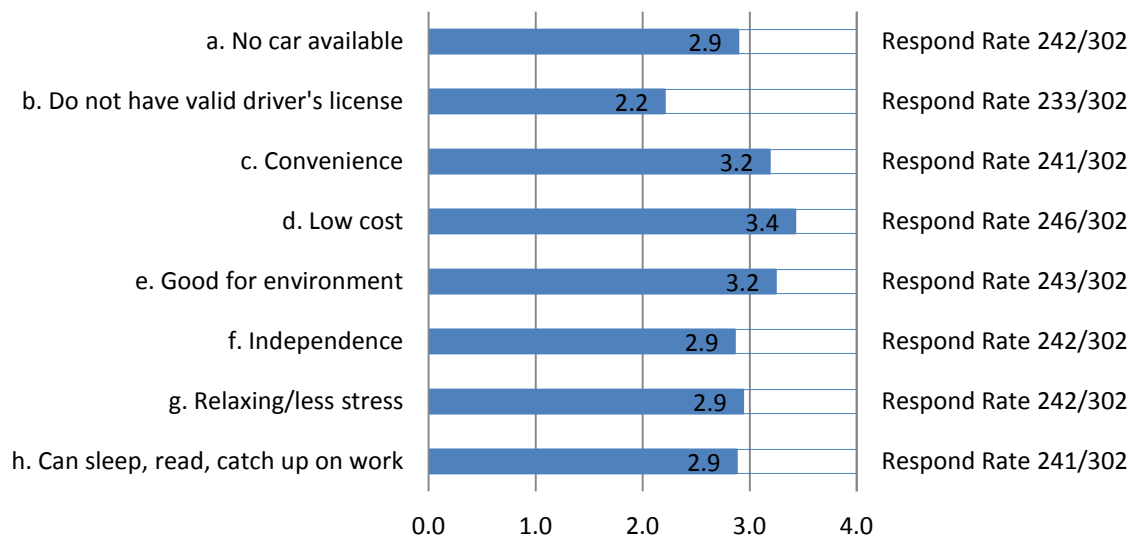
aspects of RTA services are: (1) Courtesy and competency of drivers at 3.6, (2) Safety on the vehicles and at stop at 3.6 and, (3) Bus stop appearance at 3.6 as well. The three lowest rated aspects of RTA services are: (1) Crowding on buses at 2.9, (2) Time service ends in the evening at 3.0, and (3) Convenience of pass purchase locations at 3.1. Overall, the 18 aspects recorded relatively high marks with all but one rated 3.0 or higher. See Figure 1.15 below.

Figure 1.15: Q17. Please rate the following aspects of RTA



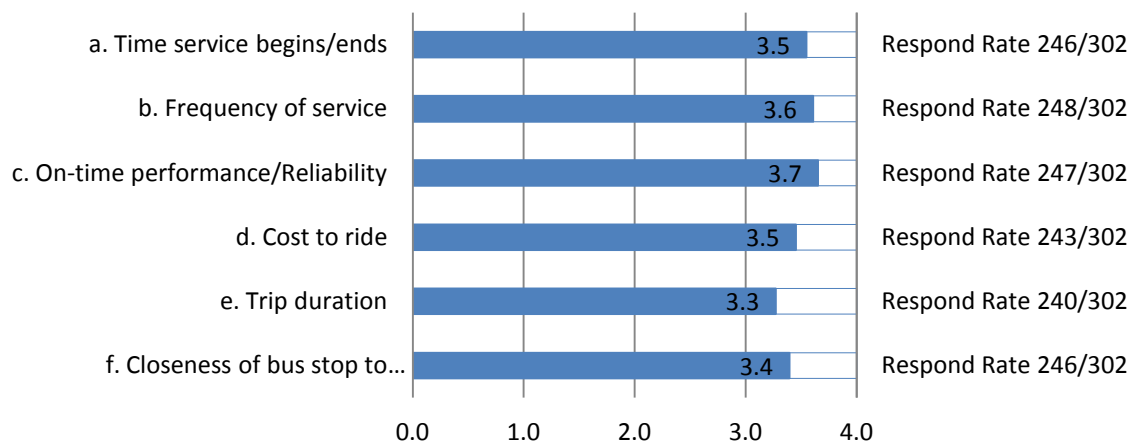
**Reasons for Use** Question #18 lists 8 reasons customers use RTA services and then asks riders to rate the reasons on a scale of 1 to 4; 1 is Least Important, 2 is Somewhat Important, 3 is Important, and 4 is Most Important. Responses to each aspect of RTA services ranged from 233 to 246. The two highest rated reasons customers use RTA services are: (1) Low cost at 3.4 and (2) Good for environment at 3.2. The two lowest rated reasons customers use RTA services are: (1) Do not have a valid driver's license at 2.2 and (2) Independence at 2.9. See Figure 1.16 below.

Figure 1.16: Q18. Please rate the reasons you use RTA services.



**Attribute Importance** Question #19 lists 6 service attributes and then asks riders to rate the attributes on a scale of 1 to 4; 1 is Least Important, 2 is Somewhat Important, 3 is Important, and 4 is Most Important. Responses to each aspect of RTA services ranged from 240 to 248. The highest rated service attribute is On-time performance/Reliability at 3.7 while the lowest rate service attribute is Trip duration at 3.3. Overall, riders rated the services attributes relatively high and with low variance among all six. See Figure 1.17 below.

Figure 1.17: Q19. Please rate the service attributes that are most important to you.



### Transportation Funding

The third section consists of four total questions that focus on collecting information regarding the rider's opinion of how transportation should be funded in San Luis Obispo County as well as their satisfaction level with alternative transportation options in the County.

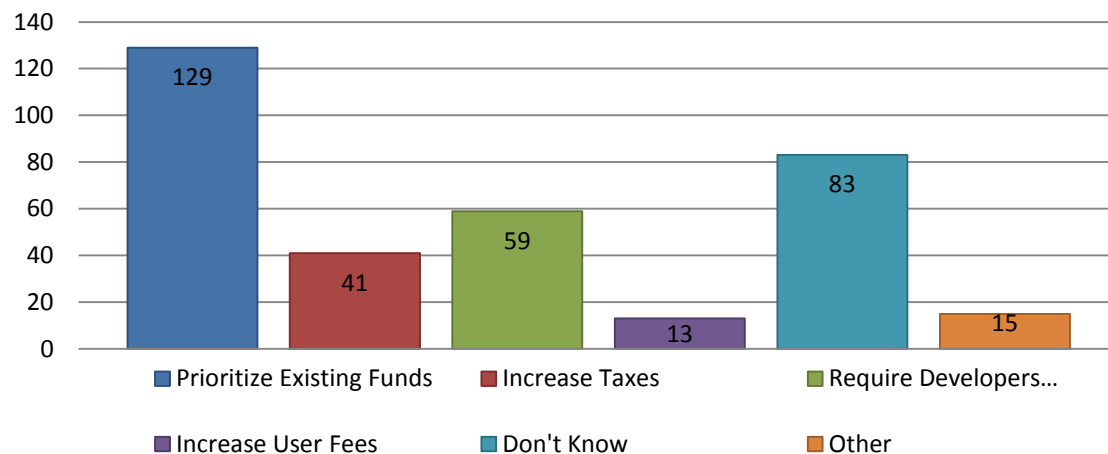


**Funding Transportation Improvements** Question #20 asks riders to indicate how they think transportation improvements within the County of San Luis Obispo should be funded. Riders were directed to mark all that they felt applied and as a result, the numbers of responses exceeds the number of riders that answered this question. Of the 252 that answered, 129 (51.2%) indicated Prioritize existing funds, 83 (32.9%) indicated Don't know, and 59 (23.4%) indicated Require developers to pay for improvements. See Figure 1.18 below.

Below is a list of some of the "Other" responses indicated by riders.

- Fundraisers (x3)
- Fine poor drivers, those who have license suspended
- Lower County official salaries
- No free days
- Advertisements on bus

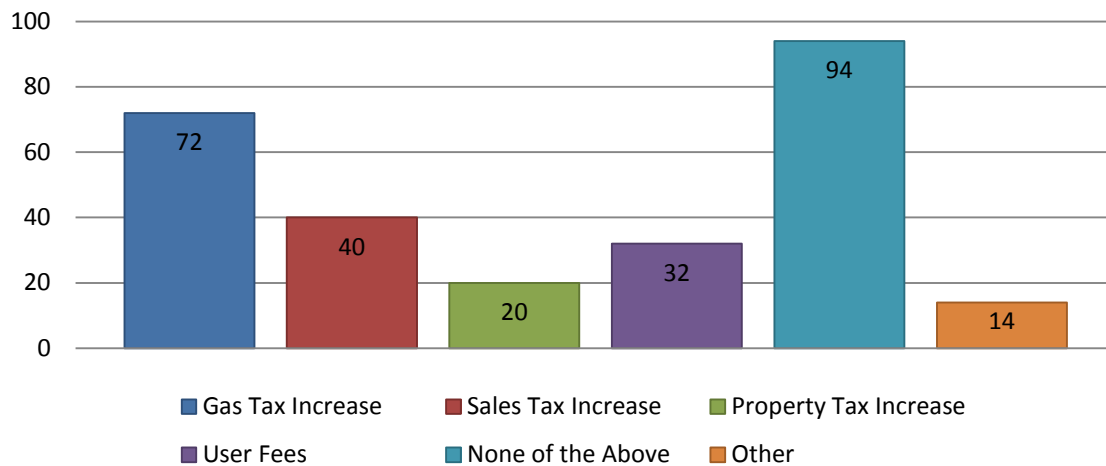
Figure 1.18: Q20. How should the County fund transportation improvements?



**Type of Tax** Question #21 asks riders to indicate what type of tax, if any, do they feel is most acceptable for transportation improvements. Riders were not directed to mark multiple answer options but some did anyway and as a result, the numbers of responses exceeds the number of riders that answered this question. Of the 243 that answered, 94 (38.7%) indicated None of the above, 72 (29.6%) indicated Gas tax increase, and 40 (16.5%) indicated Sales tax increase. See Figure 1.19 below. Below is a list of some of the "Other" responses indicated by riders.

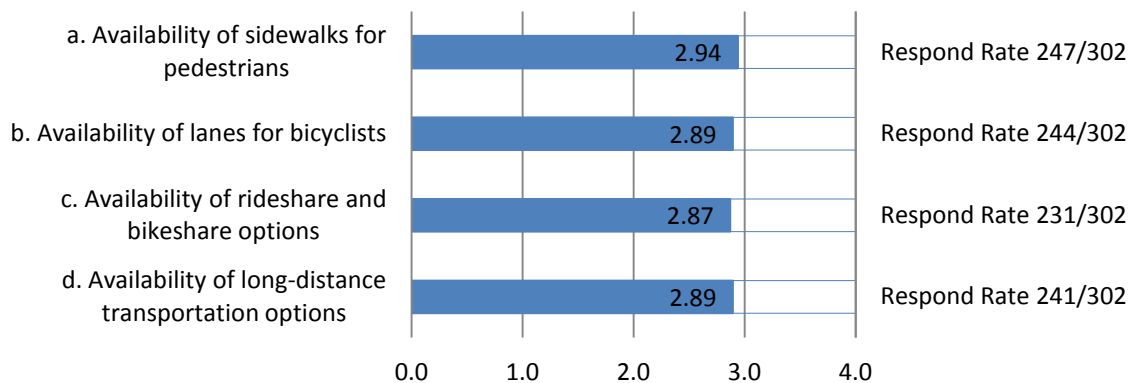
- Better planning
- Sell snacks on the bus
- Car tax registration
- The rich
- People who get traffic citations should pay a portion
- VAT-style vehicle registration fees

Figure 1.19: Q21. What type of tax, if any, would be most acceptable for transportation improvements?



**Alternative Mode Rating** Question #22 lists four alternative modes of transportation within the County and asks riders to rate them on a scale of 1 to 4; 1 is Least Important, 2 is Somewhat Important, 3 is Important, and 4 is Most Important. Responses to each aspect of RTA services ranged from 231 to 247. The highest rated alternative mode of transportation is Availability of sidewalks for pedestrians at 2.94 while the lowest rated alternative mode of transportation is Availability of rideshare and bikeshare options at 2.87. Overall, riders rated the services attributes relatively high and with low variance among all six. See Figure 1.20 below.

Figure 1.20: Q22. Please rate the satisfaction with alternative modes of transportation within the County.



**Ways to Improve** Question #23, the final question on the RTA rider survey form, is an open-ended question asking riders to comment in any way that they think will help to improve RTA services. Responses to this question can be separated into four categories: (1) changes in service, (2) bus stop amenities, (3) general comments, and (4) compliments. Changes in service received the highest number of responses with multiple comments regarding expansion of service hours and/or service frequency. See Appendix G for a list of all the open-ended question responses. Below is a list of the most common rider responses and the frequency of the responses.

- Improve service duration in the evening/weekend (x 22)
- Improve service duration in the evening/weekday (x 19)
- Improve service duration in the morning/weekend (x 12)
- Improve service frequency on weekend (x 11)
- Improve service duration in the morning/weekday (x 9)
- Improve service frequency on weekday (x 7)

# RTA Employee Survey

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## Survey Methodology

RTA employees were given a survey packet that included: (1) a survey form, (2) a copy of the memo describing the outreach effort, and (3) an envelope to ensure anonymity. The survey packets were distributed September 10<sup>th</sup>, 2013 with instructions to have the survey completed and returned no later than September 27<sup>th</sup>, 2013. As an incentive to complete and return the survey, employees that completed and returned the survey received a free Contigo® Brand spill-proof travel mug embossed with an RTA logo.

Several of the surveys were returned after September 27<sup>th</sup> however, they were still included in the data analysis and findings for this report. Of the 90 total active RTA employees, 60 completed and returned surveys resulting in a 66.7% response rate. The section below is an analysis of the 60 completed and returned RTA employee surveys.

## Survey Results

The RTA employee survey form is a two-sided form consisting of 13 total questions. The questions are separated into three sections: (1) Please Tell Us About You – questions about employment and trip patterns, (2) Perception of RTA Services – questions about customer satisfaction, and (3) Strategic Business Plan Standards – questions that will assist in the benchmarking of certain RTA service objectives.

### *Please Tell Us About You*

The first section of the RTA employee survey form asks employees questions regarding their current employment status at RTA and whether the employee currently uses any RTA services. For more information, see Appendix A for a copy of the RTA rider survey instrument. Question #1 asks RTA employees to indicate their current position at RTA. Of the 59 employees that answered, 33 (55.9%) indicated Operator, 11 (18.6%) indicated Supervisor, 7 (11.9%) indicated Maintenance, and 7 (11.9%) indicated Administration. See Figure 2.1 below.

The employees that indicated “Operator” were asked to indicate which RTA service(s) they operated. All of the employees that indicated “Operator” answered this follow-up question. Of the 33 bus operators, 42% indicated Fixed-Route only, 24% indicated Runabout only and 27% indicated Fixed-Route and Runabout. Some of the RTA Supervisors, on occasion, operate some of the RTA services but for the purposes of this survey they were not required to indicate the specifics of their operator experience. See Figure 2.2 below.

Figure 2.1: Q1. What is your Current Position at RTA?

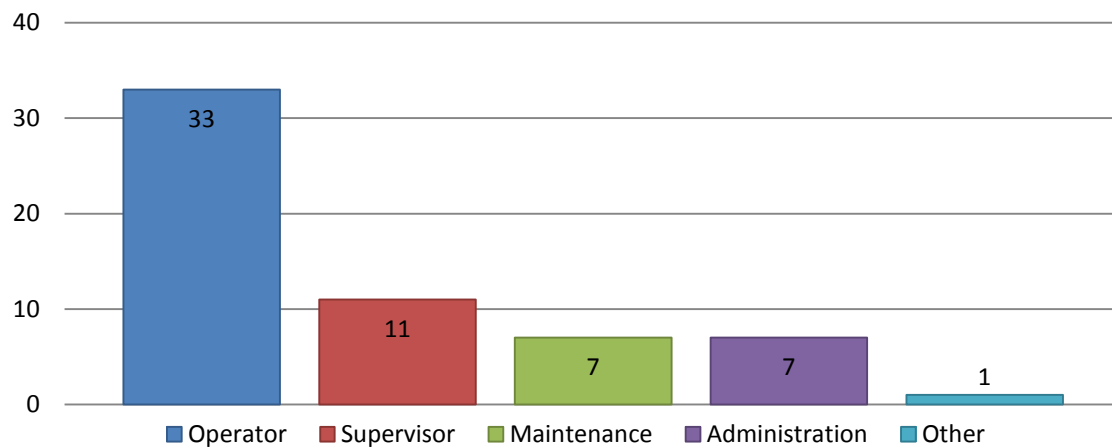
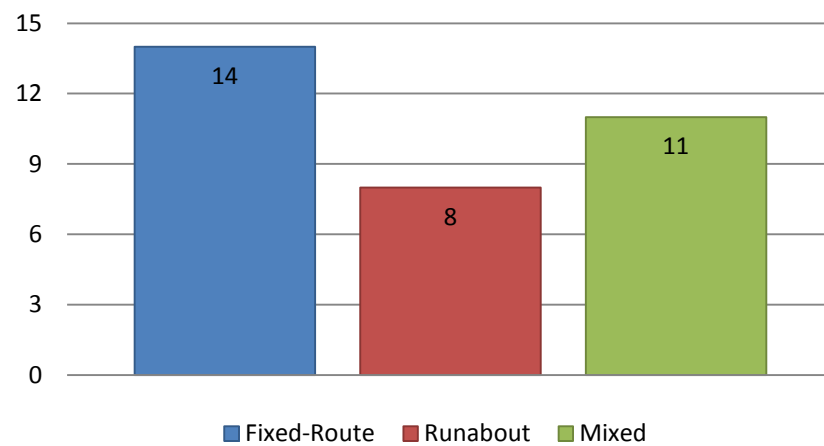
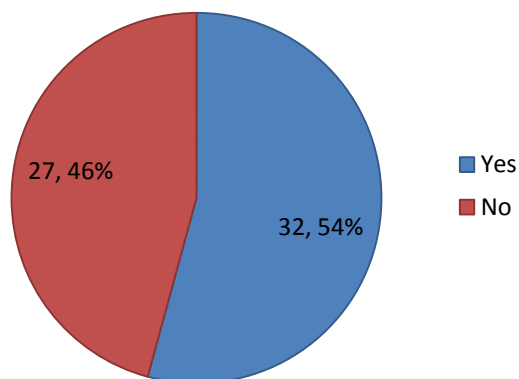


Figure 2.2: Q1A. If Operator, which service(s)?



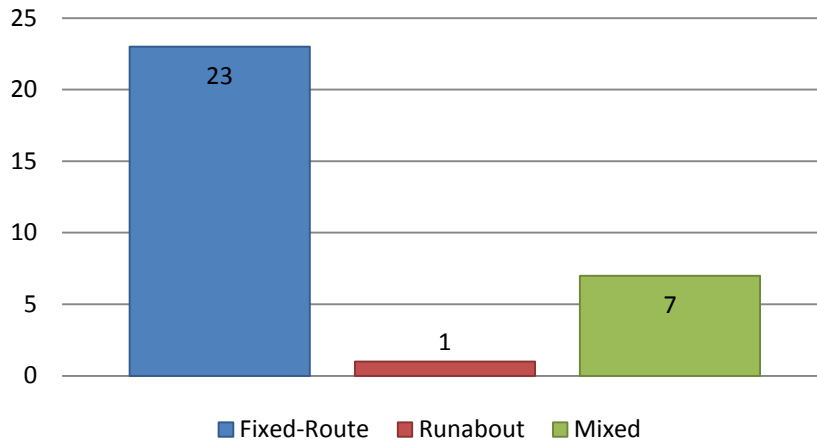
Question #2 asks employees to indicate if they currently use any of RTA services. Of the 59 employees that answered, 27 (45.8%) indicated No while 32 (54.2%) indicated Yes. See Figure 2.3 below. Those that indicated “Yes” were asked three follow-up questions regarding specifics about their usage of RTA services. See Figures 2.4, 2.5, and 2.6 below.

Figure 2.3: Q2. Do you currently use any RTA services?



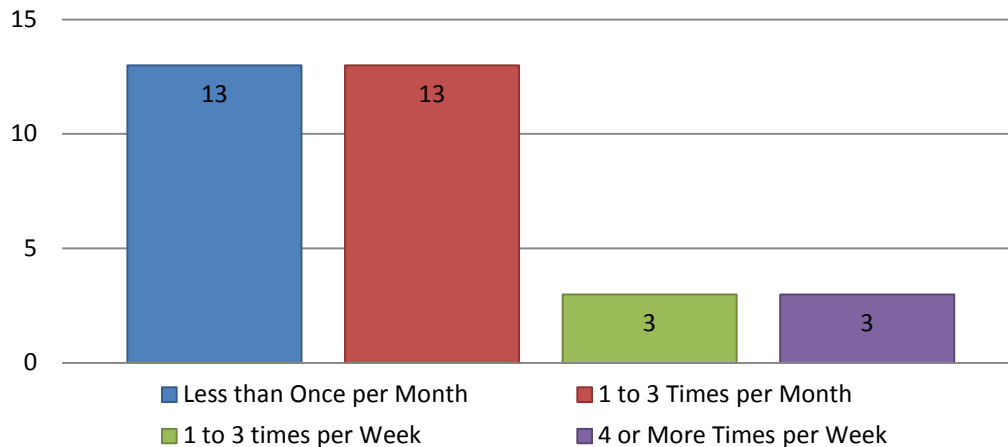
The first follow-up question asked employees that currently use RTA services to specify which service(s). The majority (74.2%) indicated they use RTA's Fixed-Route service only and 22.6% indicated some combination Fixed-Route, Runabout, Trolley, and or Dial-a-Ride.

Figure 2.4: Q2A. Which one(s)?



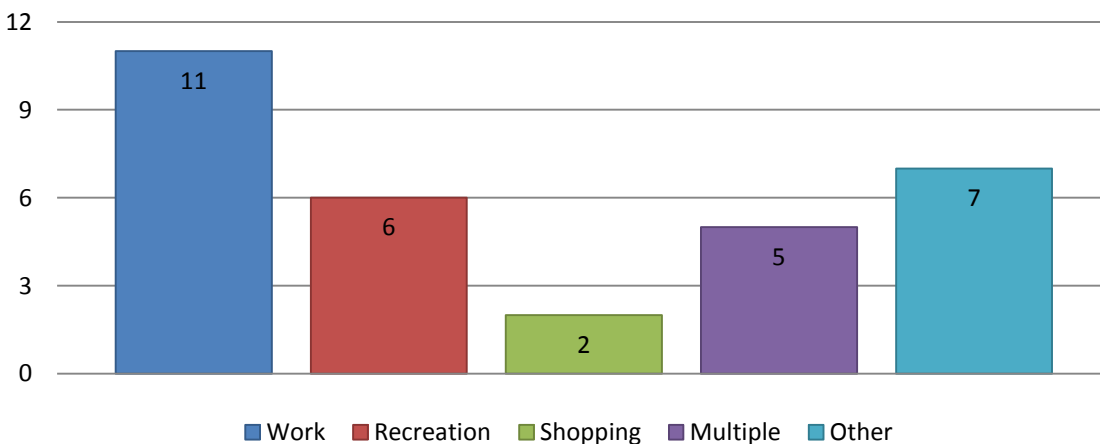
The second follow-up question asked employees that currently use RTA services to specify how often they ride. Of the 32 employees that answered this question, 13 (40.6%) indicated less than once per month, 13 (40.6%) indicated 1 to 3 times per month, and 3 (9.4%) indicated 1 to 3 times per week. A somewhat surprisingly high number of RTA employees regularly use RTA services, with about 50% of those that ride, taking trips at least once per month.

Figure 2.5: Q2B. How often do you ride?



The third follow-up question asked employees that currently use RTA services to indicate what the general purpose(s) of the trips using RTA services. Of the 32 employees that answered this question, 11 (34.4%) indicated Work, 7 (21.9%) indicated Other, and 6 (18.8%) indicated Recreation. The "Other" category maybe misleading because, for the purposes of this survey, it might include the general purpose of the trips being part of a requirement for work.

Figure 2.6: Q2C. What is the general purpose of your trips taken using RTA services?

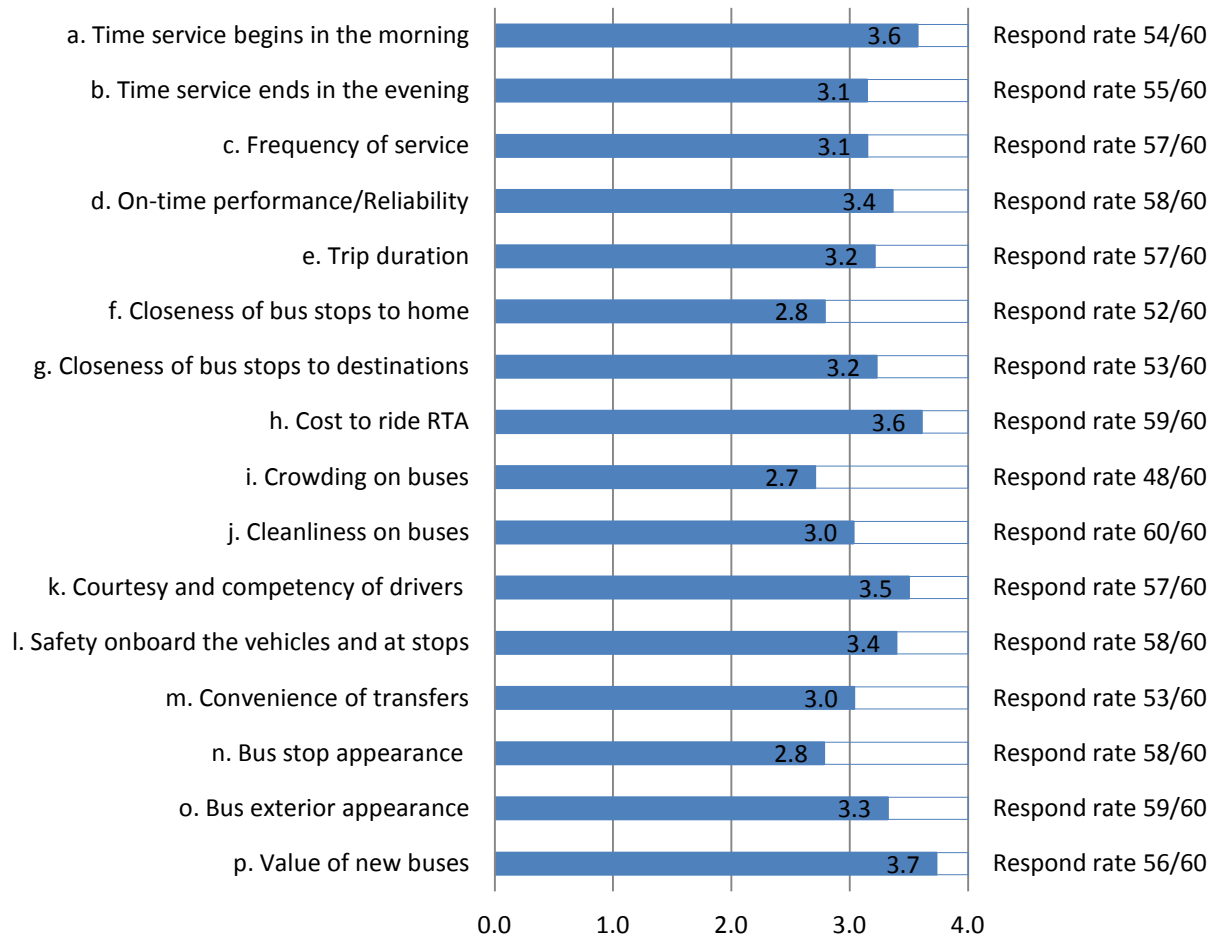


### *Perception of RTA Services*

The second section of the RTA employee survey form asks employees questions regarding their perceptions of RTA services. Question #3 of the RTA employee survey form lists 16 aspects of RTA services and then asks employees to rate the aspects on a scale of 1 to 4; 1 is Poor, 2 is Fair, 3 is Good, and 4 is Excellent. See Figure 2.7 below. Each aspect listed also had an option for the employee to answer with a “Don’t know” response. As a result, the number of rated responses for each aspect varies between 48 and 60 respondents. Nonetheless, this does not significantly affect the outcome of the aggregated ratings.

The three highest rated aspects of RTA services are: (1) value of new buses at 3.7, (2) cost to ride RTA at 3.6, and (3) time service begins in the morning at 3.6. The three lowest rated aspects of RTA services are: (1) crowding on buses at 2.7, (2) closeness of bus stops to home at 2.8, and (3) bus stop appearance at 2.8. Overall, the 16 aspects recorded relatively high marks with all but the lowest three rated 3.0 or higher.

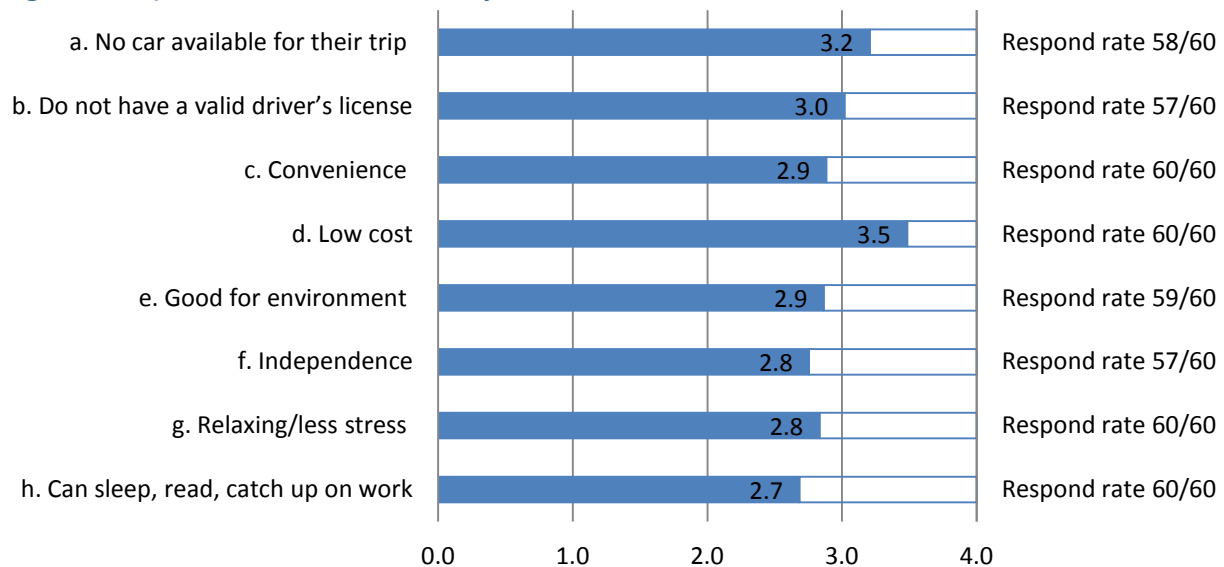
Figure 2.7: Q3. Please rate your perceptions about RTA service



Question #4 lists 8 possible reasons customers use RTA services and then asks employees to rate the reasons on a scale of 1 to 4; 1 is Least Important, 2 is Somewhat Important, 3 is Important, and 4 is Most Important. See Figure 2.8 below. Similar to Question #3, employees were given the option to indicate “Don’t know” for each reason. The number of rated responses for each attribute varied between 57 and 60 respondents. The two highest rated reasons for using RTA services are: (1) Low cost at 3.5 and (2) No car available for their trip at 3.2. The two lowest rated reasons are: (1) Can sleep, read, catch up on work at 2.7 and (2) Independence at 2.8.

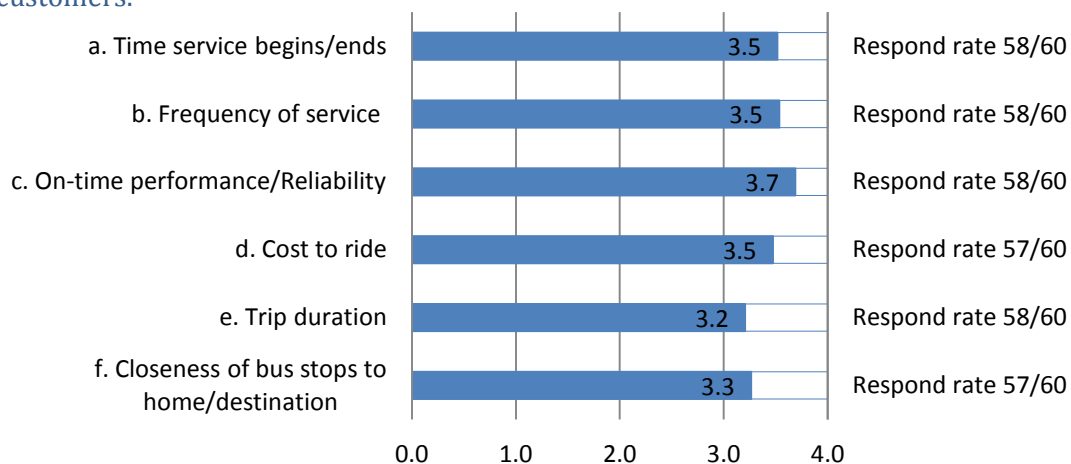


Figure 2.8: Q4. Please rate the reasons you believe customers use RTA services.



Question #5 lists 6 service attributes and then asks employees to rate the attributes on a scale of 1 to 4; 1 is Least Important, 2 is Somewhat Important, 3 is Important, and 4 is Most Important. See Figure 2.9 below. Similar to Question #3 and #4, employees were given the option to indicate “Don’t know” for each reason. The number of rated responses for each attribute varied between 57 and 58 respondents. The highest rated service attributes is On-time performance/Reliability at 3.7 while the lowest rated service attribute is Trip duration at 3.2. Overall, employee rated the services attributes relatively high and with low variance among all six. This is an indication that RTA employees think all six attributes are important to RTA customers.

Figure 2.9: Q5. Please rate the service attributes that you think are most important to customers.



### Strategic Business Plan Standards

The third section of the RTA employee survey form asks employees questions regarding service performance standards set forth in the recently adopted RTA Strategic Business Plan. The findings

from these questions will assist in setting benchmarks for particular service objectives that can be used in the future for comparison. Five of the eight questions in this section are open-ended questions providing RTA employees greater flexibility when answering. See Appendix G for a list of all the open-ended question responses.

Question #6 asks employees to indicate some ways that RTA can improve the timing and efficiency of transfers. Responses to this question can be separated into four categories: (1) coordination with other transit agencies, (2) intra-agency communication, (3) changes to service, and (4) changes in operation. For example, one employee suggested that “local buses re-work schedule around RTA schedule” as a way of improving transfers. A majority of the comments suggest in a general way that improvement in communication between transit agencies, RTA employees, and/or between RTA and customers will help to improve transfers as well.

- Changes to services (x 10)
- Changes in operation (x 8)
- Coordination with other transit agencies (x 5)
- Intra-agency communication (x 4)

Question #7 asks employees to indicate how they feel about RTA’s new “low-floor” buses. Responses to this question can be separated into four categories: (1) ease of use, (2) seats/seating, (3) generally positive responses, and (4) miscellaneous. Ease of use refers to employees’ ability to quickly and easily load and unload customers in wheelchairs. Seats/seating refers to either the reduction in seats compared to the old buses or the uncomfortable nature of the new buses’ seats. For example, one employee stated that, “The only drawback to the new buses is the loss of 5 seats to the low floor.” Generally positive responses are comments such as: “great”, “love them”, “thumbs up”, and so on. Most of the comments from the employees fall into this category.

- Generally positive responses (x 22)
- Ease of use (x 11)
- Seats/seating (x 10)
- Miscellaneous (x 5)

Question #8 asks employees to indicate some ways that RTA can improve the length of employment for employees. Responses to this question can be separated into three categories: (1) higher wages, (2) better benefits, and (3) Operational changes. Responses relating to higher pay for drivers were an overwhelming majority among response categories.

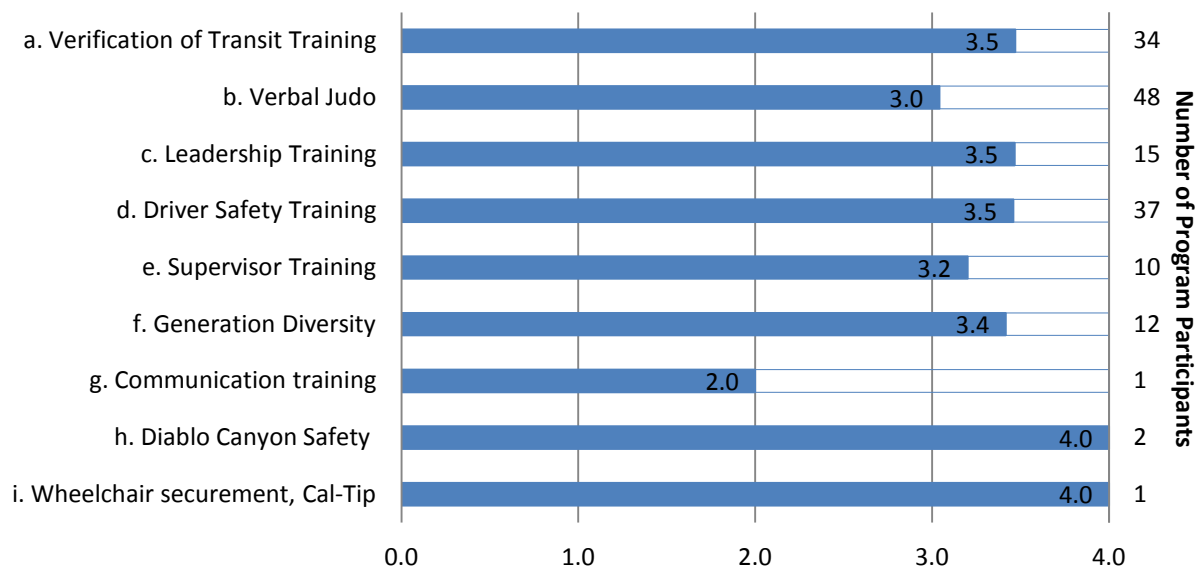
- Higher wages (x 39)
- Better benefits (x 6)
- Operational changes (x 4)

Question #9 asks employees to indicate if they have participated in six different training and or development programs that RTA has offered in the past. If the employee has participated in a particular training and or development program then they are asked to rate their experience on a scale of 1 to 4; 1 is Poor, 2 is Fair, 3 is Good, and 4 is Excellent. Employees also have an “Other” option where they can write in additional training and or development programs that are not listed but they have participated in so they can rate those as well. See Figure 2.10 below.

Not all employees have the opportunity to participate in every training and or development program offered by RTA so the number of respondents varies greatly from 12 to 48 for listed programs and 1 to 2 for “Other” programs that employees wrote in themselves. The highest rated program, aside from the “Other” category, is actually a three-way tie between Verification of Transit Training, Leadership Training, and Driver Safety Training at 3.5. The lowest rated program, aside from the “Other” category, is Verbal Judo at 3.0.

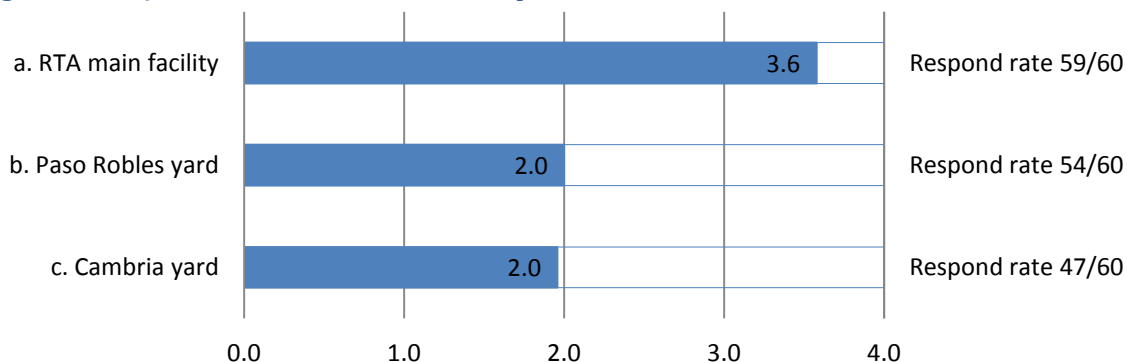
Figure 2.10: Q9. Training/development programs participation and experience.

Almost all the respondents have participated in some types of training; 48 attended Verbal Judo, 37 have participated in Driver Safety Training and 34 in VTT (Verification of Transit Training). Responses were generally high, between 3 and 4’s.



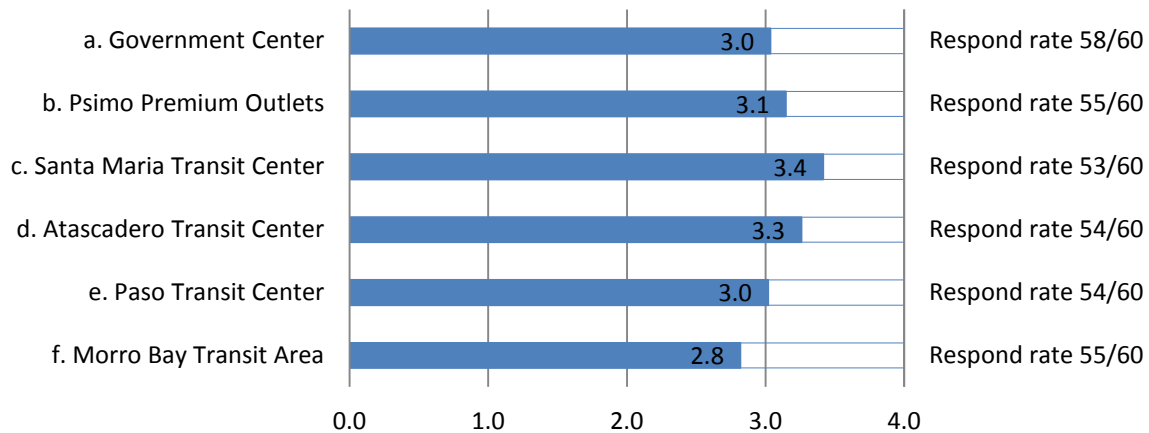
Question #10 asks employees to rate the existing state of RTA facilities including: RTA’s main facility, Paso Robles yard, and Cambria yard. The rating scale is from 1 to 4; 1 is Poor, 2 is Fair, 3 is Good, and 4 is Excellent. RTA’s main facility received high ratings with an average of 3.6 while the other two facilities received low ratings with both averaging 2.0. See Figure 2.11 below.

Figure 2.11: Q10. Please rate the state or repair of RTA facilities.



Question #11 asks employees to rate the existing state of RTA passenger facilities on a scale of 1 to 4; 1 is Poor, 2 is Fair, 3 is Good, and 4 is Excellent. Passenger facilities refer to major bus stops and transit centers throughout the County that are served by RTA fixed-routes. The highest rated passenger facility is the two year old Santa Maria Transit Center at 3.4, with the brand new Atascadero Transit Center rated just behind at 3.2. For comparison, RTA's main bus stop at the Government Center downtown rated a 3.0 and the Paso Transit Center also at 3.0. The lowest rated passenger facility is the Morro Bay Transit Center at 2.8. See Figure 2.12 below.

Figure 2.12: Q11. Please rate the state or repair of RTA passenger facilities.



Question #12 asks employees to indicate how RTA can improve the safety and appeal of RTA bus stops and RTA facilities. Responses to this question can be separated into three categories: (1) lighting/visibility, (2) maintenance and cleanliness, and (3) bus stop amenities. A majority of the responses were related to the ability of RTA drivers to see customers at bus stops and the ability of customers to read signage at bus stops. Employees also felt that regular maintenance and cleaning would improve the appeal and safety of RTA facilities. Bus stop amenities refer to all comments regarding bus stops other than lighting; for example, several employees suggested trash cans and/or better shading at bus stops.

- Lighting/visibility (x 21)
- Maintenance and cleanliness (x 10)
- Bus stop amenities (x 8)

Question #13 asks employees to comment in any way that they feel will improve RTA services. Responses to this question can be separated into four categories: (1) changes in service, (2) changes in operation, (3) higher wages, and (4) marketing. Most of the comments received for this question are associated in some way with the other open-ended response questions. For example, six of the responses indicated higher pay/better wages for drivers which are similar to the responses given for question #8. See Appendix G for a list of all the open-ended question responses.

- Changes in service (x 10)
- Changes in operations (x 9)
- Higher wages (x 6)
- Marketing (x 2)

## SCT Rider Survey

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### Survey Methodology

SCT riders were surveyed in-person on various trips on routes 21, 22, 23, and 24 beginning on Friday October 25<sup>th</sup>, 2013 and ending on Friday November 8<sup>th</sup>, 2013 for a total of four days. One surveyor was tasked with administering the SCT rider surveys throughout the data collection process. The surveyor rode the bus anywhere from five to six hours each time. The surveyor typically started the data collection process at the Pismo Beach Premium Outlet bus stop located in Pismo Beach. The surveyor boarded the bus at the beginning of a trip, introduced himself to the driver, and then made an announcement to all riders on the bus about the survey before the bus left the bus stop.

After the first stop of any trip, the surveyor then asked each person that boarded the bus at each subsequent bus stop whether they would voluntarily complete a survey. If the rider agreed to complete a survey then the surveyor would hand them a (1) survey form, (2) a clipboard, and (3) a blue ink pen. The rider would then take the survey tools to their seat and complete the survey. After the rider completed the survey, the surveyor would come by and collect the survey tools from the rider. Table 3.1 below is a summary of the data collection process including the number of surveys collected per day. The total number of surveys collected from SCT riders during the data collection process is 75 with an average of 19 surveys collected per day.

Table 3.1: Summary of SCT Rider Data Collection

Date	Day	# of Surveys Collected
Oct. 25 <sup>th</sup>	Friday	14
Oct. 29 <sup>th</sup>	Tuesday	11
Oct. 30 <sup>th</sup>	Wednesday	19
Nov. 8 <sup>th</sup>	Friday	31
Total		75

### Survey Results

The SCT rider survey form is a two-sided form consisting of 23 total questions. The questions are separated into three sections: (1) Please Tell Us About You – questions about demographics, trip patterns, and information sources, (2) Perception of SCT Services – questions about customer satisfaction, and (3) Transportation Funding – questions about financing bus service in San Luis Obispo County.

#### *Please Tell Us About You*

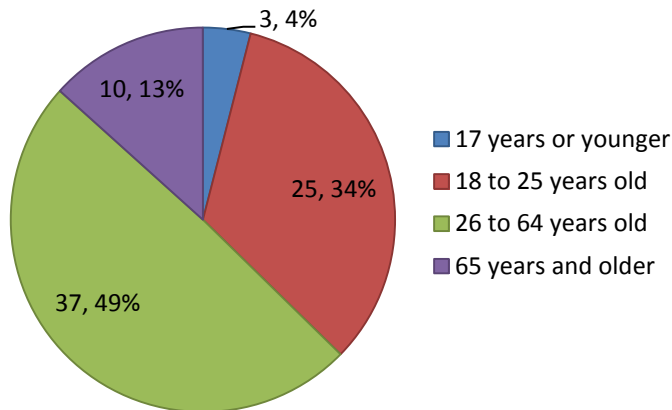
The first section consists of 16 total questions that focus on collecting information regarding the rider's bus trip he or she is making at the time he or she agreed to complete a survey as well as some demographic information about the rider. The only major issue with this section of the survey form uncovered during the data collection process is that questions 1-4 and 7-12 are side-by-side which led to some riders inadvertently skipping over the even numbered questions. For more information, see Appendix A for a copy of the SCT rider survey instrument.

## Demographic Profile

**Gender** Question #16 asks riders to indicate their gender. Of the 75 that answered, 41 (55%) indicated female and 34 (45%) indicated male.

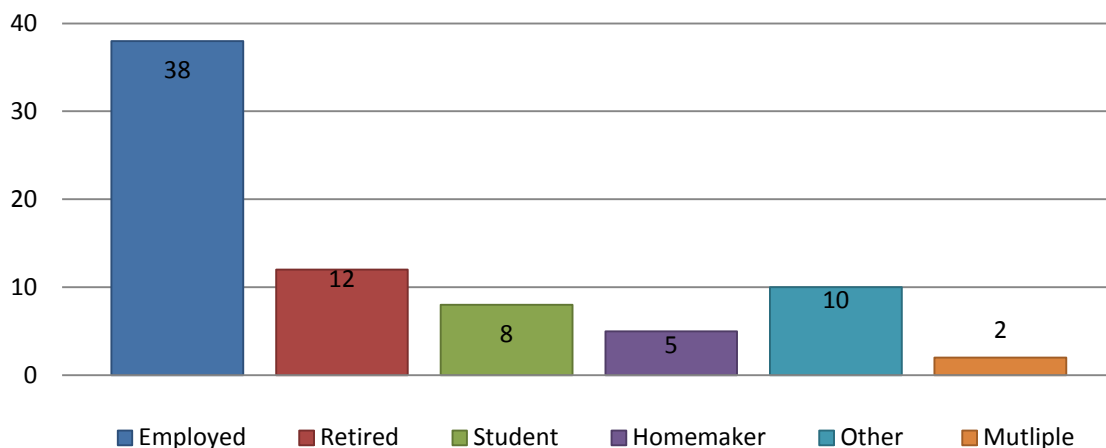
**Age** Question #15 asks riders to indicate their age. Of the 75 that answered, 37 (49.3%) indicated 26 to 64 years, 25 (33.3%) indicated 18 to 25 years, and 10 (13.3%) indicated 65 years and older. See Figure 3.1 below.

Figure 3.1: Q15. What is your age?



**Employment Status** Question #14 asks riders to indicate which option best describes their current employment status. Of the 75 that answered, 38 (50.7%) indicated Employed, 12 (16%) indicated Retired, 10 (13.3%) indicated Other, and 8 (10.7%) indicated Student. “Student” and “Homemaker” are included in this question because these are typically viewed as an alternative to employment. The riders that indicated “Other” did not specify their current employment status. See Figure 3.2 below.

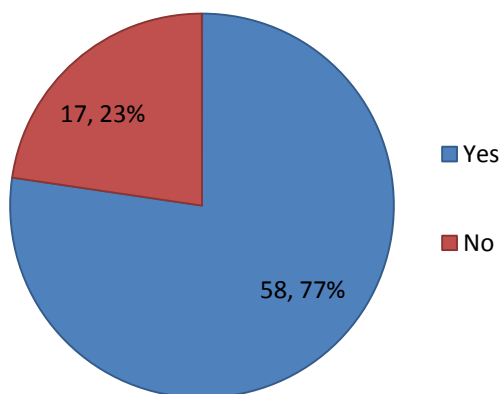
Figure 3.2: Q14. Which of the following best describes your employment status?



## Travel Patterns

**One-way vs. Roundtrip** Question #1 asks SCT riders to indicate if they will be traveling roundtrip on SCT buses today. Of the 75 that answered, 58 (77%) riders answered this question Yes. Some riders were confused on exactly how to answer this question. For example, if a rider was filling out a survey form on their return bus trip then they were in fact making a roundtrip using SCT services but the language in the question suggests that the roundtrip will occur sometime in the future. See Figure 3.3 below.

Figure 3.3: Q1. Will you be traveling roundtrip on SCT today?



Question #3 asks riders to indicate how they got to the bus stop where they boarded the bus. Of the 75 riders that answered, 51 (68%) indicated Walked, 14 (18.7%) indicated Transferred from another bus, 4 (5.3%) Park and Ride, and 3 (4%) indicated Bicycle. Those that indicated “Transferred from another bus” were asked a follow-up question regarding which bus service they transferred from. Of the 11 that answered, 6 (54.5%) indicated Route 10, 2 (18.2%) indicated Route 21, 2 (18.2%) indicated Route 24, and 1 (9.1%) indicated Route 22. See Figure 3.4 below.

Question #4 asks riders to indicate how they will get to their destination once they de-board (get off) the bus. Of the 75 riders that answered, 49 (65.3%) indicated Walk, 13 (17.3%) indicated Transfer to another bus, 3 (4%) indicated Bicycle, and 3 (4%) indicated Pick-up. Those that indicated “Transfer to another bus” were asked a follow-up question regarding which bus service they will transfer to. Of the 8 that answered, 3 (37.5%) indicated Route 23, 2 (25%) indicated Route 24, 2 (25%) indicated Route 10, and 1 (12.5%) indicated Route 22. See Figure 3.5 below.

Figure 3.4: Comparison of Responses to Q3 and Q4

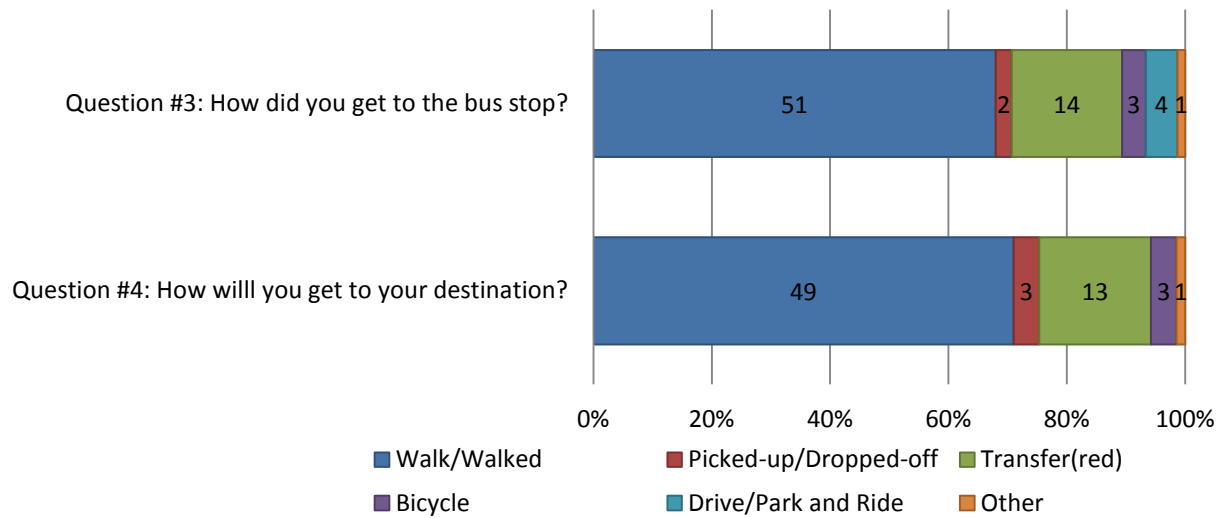
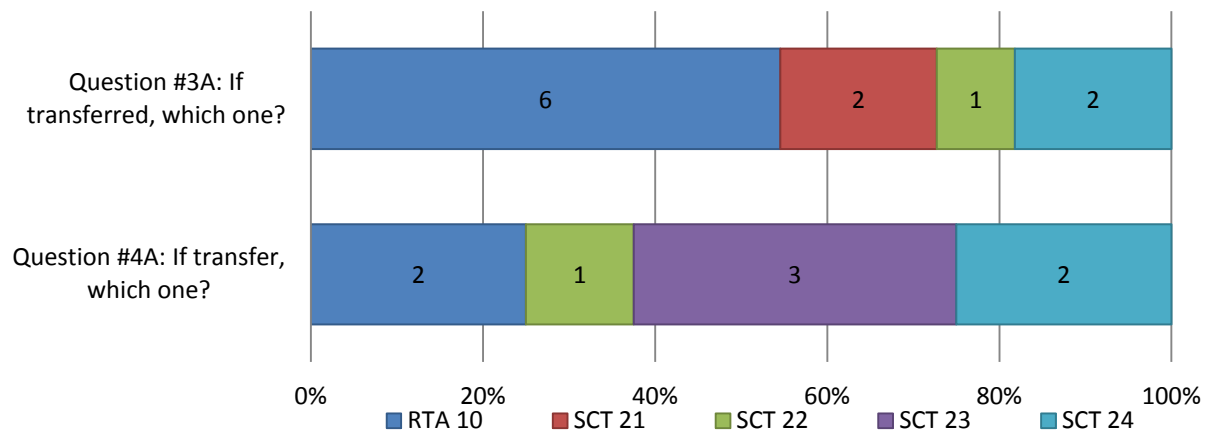


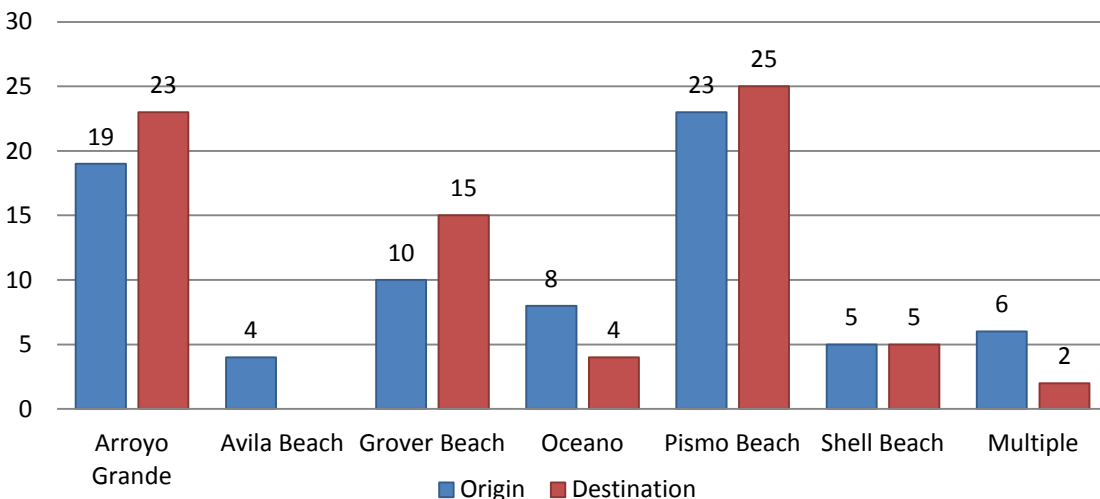
Figure 3.5: Comparison of Responses to Q3A and Q4A



**Origin and Destination** Question #5 asks riders to indicate which city or community did they board the bus. Of the 75 that answered, 23 (30.7%) indicated Pismo Beach, 19 (25.3%) indicated Arroyo Grande, 10 (13.3%) indicated Grover Beach, and 8 (10.7%) indicated Oceano. Question #6 asks riders to indicate which city or community will they de-board (get off) the bus. Of the 74 that answered, 25 (33.8%) indicated Pismo Beach, 23 (31.1%) indicated Arroyo Grande, 15 (20.2%) indicated Grover Beach, and 5 (6.8%) indicated Shell Beach. See Figure 3.6 below.

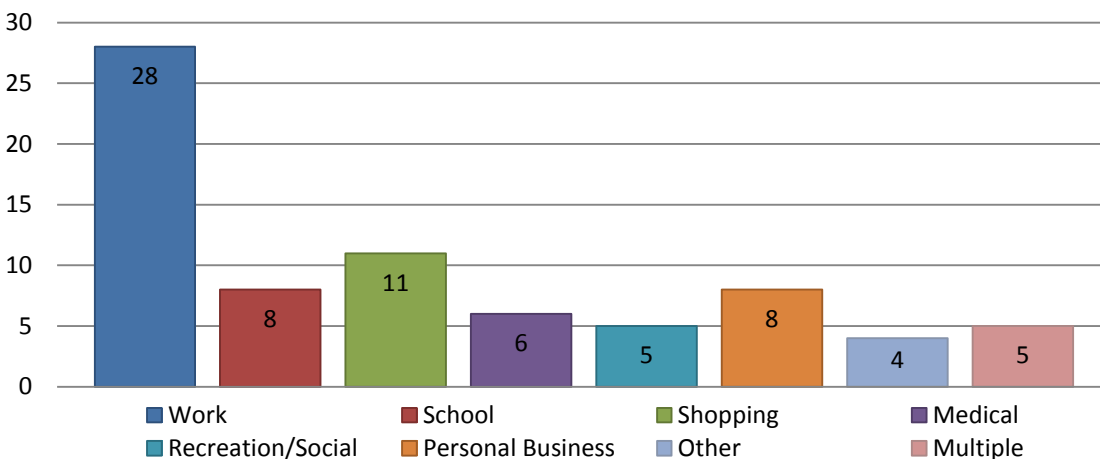


Figure 3.6: Origin and Destination of SCT Riders



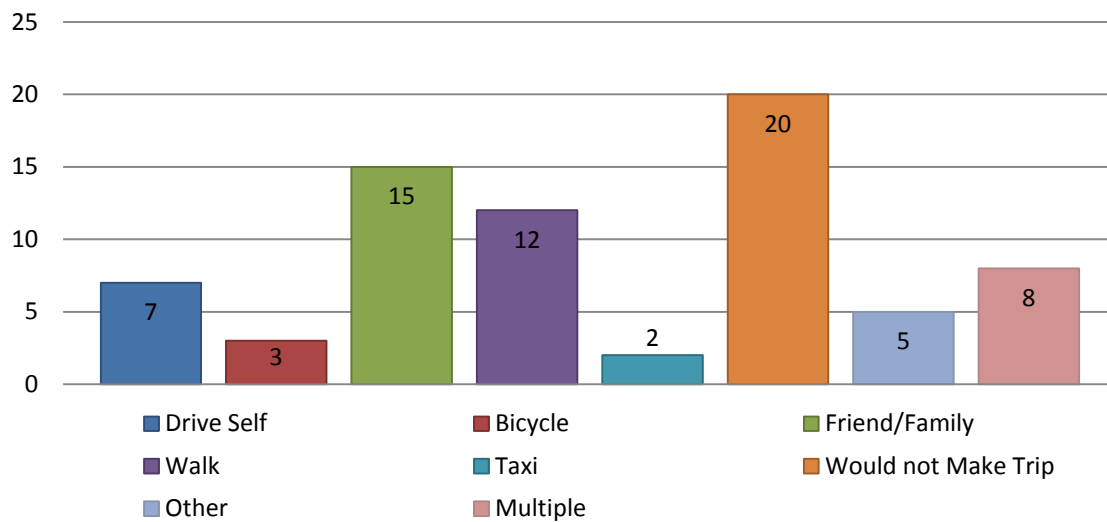
**Trip Purpose** Question #7 asks riders to indicate what the main purpose of their trip on the day they completed the survey. Of the 75 riders that answered, 28 (37.3%) indicated Work, 11 (14.7%) indicated Shopping, 8 (10.7%) indicated School, and 8 (10.7%) indicated Personal Business. See Figure 3.7 below.

Figure 3.7: Q7. What is the main purpose of your trip today?



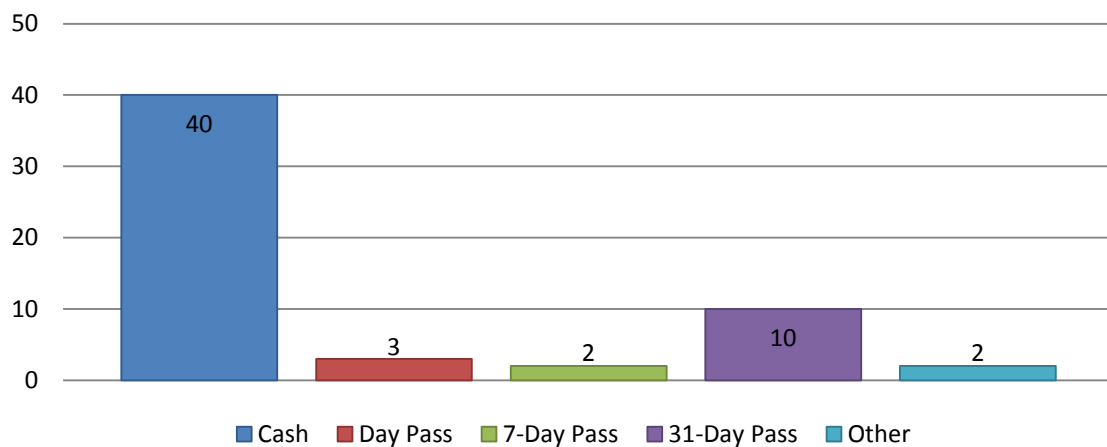
**Alternative Travel Modes** Question #2 asks riders to indicate how they would make the trip they were making at the time they agreed to complete a survey if SCT services were not available. Of the 72 riders that answered, 20 (27.8%) indicated Would not Make Trip, 15 (20.8%) indicated Friend/family, 12 (16.7%) indicated Walk, and 7 (9.7%) indicated Drive self. This suggests that the 26.5% of riders that indicated that they “Would not Make Trip” are transit dependent upon SCT services for that particular trip and possibly other trips they make using SCT services. See Figure 3.8 below.

Figure 3.8: Q2. How would you make this trip if SCT was not available?



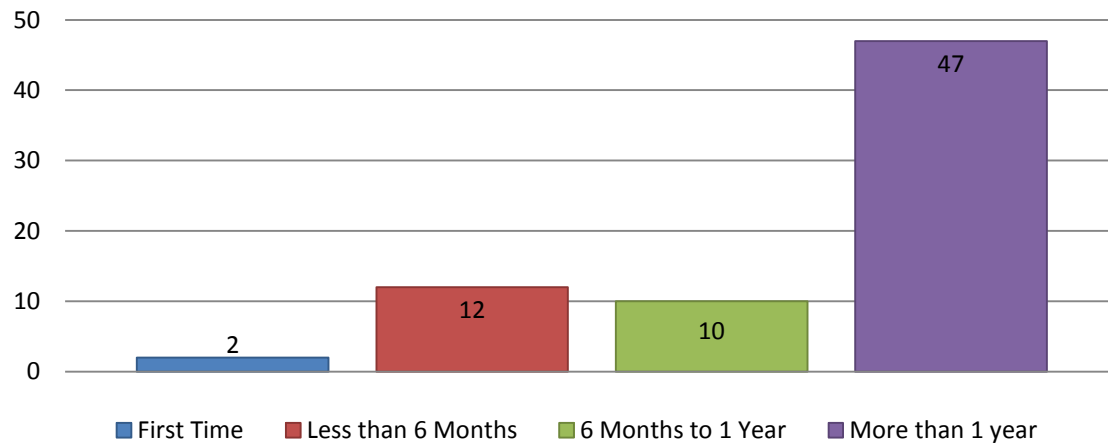
**Fare Payment** Question #8 asks riders to indicate how they paid their fare. Of the 57 riders that answered, 40 (70.2%) indicated Cash, 10 (17.5%) indicated 31-Day Pass, and 3 (5.3%) indicated Day Pass. The “Other” responses are likely handicapped individuals, elderly, and or children that do not have to pay fare. See Figure 3.9 below.

Figure 3.9: Q8. How did you pay for your fare today?



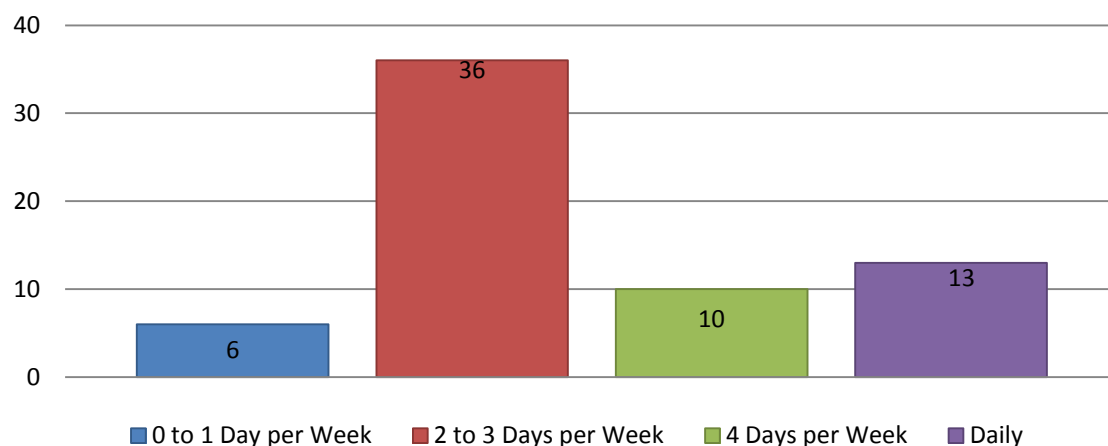
**Length of Use** Question #9 asks riders to indicate how long they have been using SCT services. Of the 71 that answered, 47 (66.2%) indicated More than 1 Year, 12 (16.9%) indicated Less than 6 Months, and 10 (14.1%) indicated 6 Months to 1 Year. This suggests that 2/3 of surveyed riders have been using SCT services for more than 1 year. See Figure 3.10 below.

Figure 3.10: Q9. How long have you been riding SCT?



**Trip Frequency** Question #10 asks riders to indicate how often they use SCT services. Of the 65 that answered, 36 (55.4%) indicated 2 to 3 Days per Week, 13 (20%) indicated Daily, and 10 (15.4%) indicated 4 Days per Week. See Figure 3.11 below.

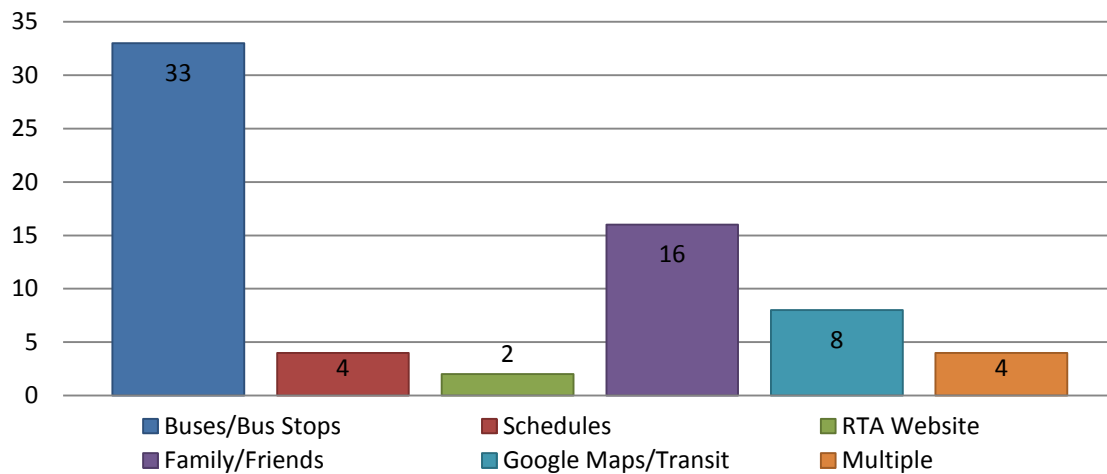
Figure 3.11: Q10. How often do you ride SCT?



## Information Sources/Marketing

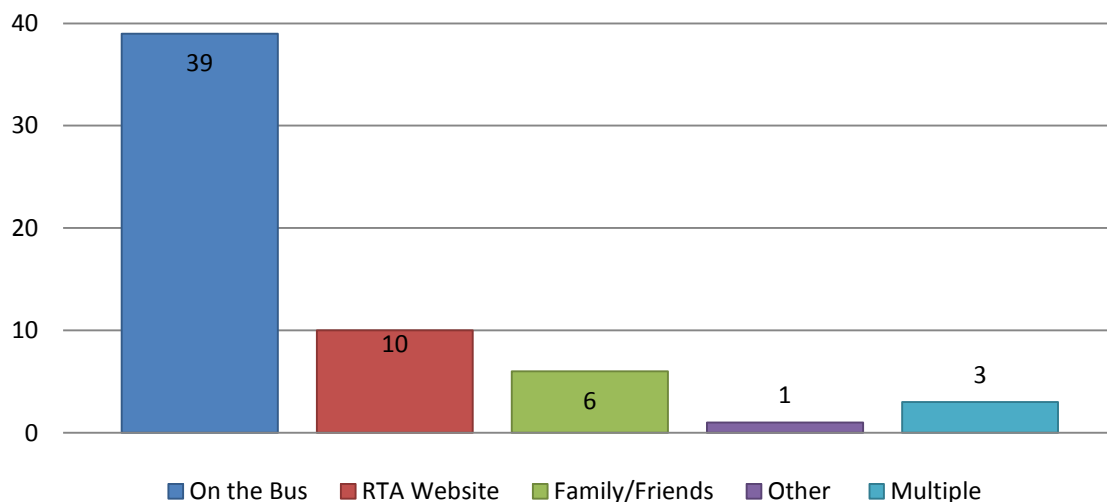
**Initial Information Source** Question #11 asks riders to indicate how they first heard about SCT. Of the 67 that answered, 33 (49.3%) indicated Buses/Bus Stops, 16 (23.9%) indicated Family/Friends, 8 (11.9%) indicated Google Maps/Transit, and 4 (6.0%) indicated Schedules. See Figure 3.12 below.

Figure 3.12: Q11. How did you first hear about SCT?



**Usual Information Source** Question #12 asks riders to indicate how they get most of their information about RTA services. Of the 59 that answered, 39 (66.1%) indicated On the Bus, 10 (16.9%) indicated RTA Website, and 6 (10.2%) indicated Family/Friends. Based on the rider responses, 66.1% of riders got most of SCT information “On the bus”. See Figure 3.13 below.

Figure 3.13: Q12. How do you get most of your information about SCT?



**Desired Information Source** Question #13 is an open-ended response question that asks riders to write down what they think is the best way for SCT to tell people about their services. The most common responses include: fliers, television ads, internet advertising, word of mouth, and print/newspaper advertising. Some of the responses suggested locations for print advertisements such as colleges, Laundromats, transit centers, and public events (i.e. Farmer’s Markets). See Appendix G for a list of all the open-ended question responses.

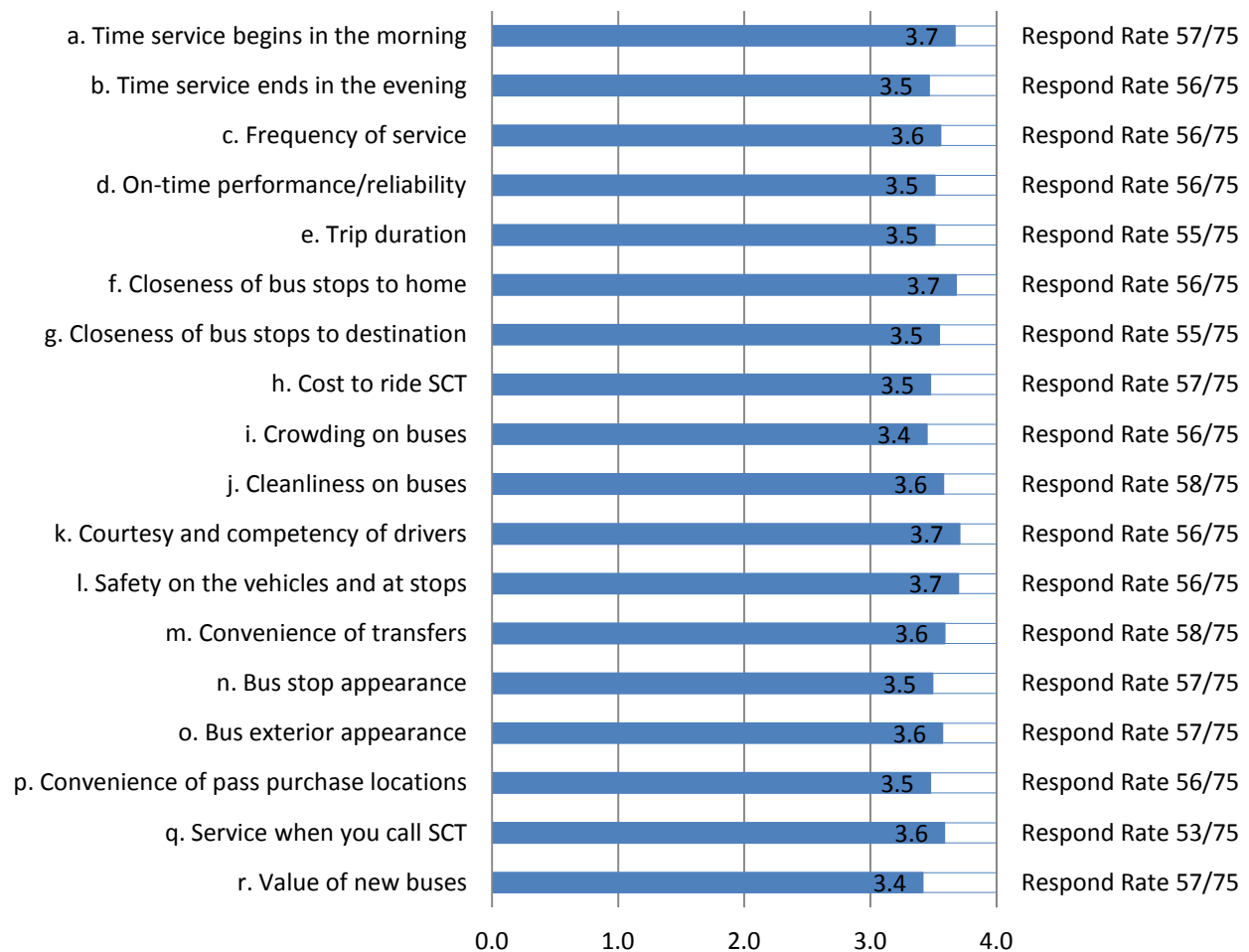
## Perception of SCT Services

The second section consists of three total questions that focus on collecting information regarding the rider's perception of various aspects of SCT services.

### Customer Satisfaction

**Experience Rating** Question #17 of the SCT rider survey form lists 18 aspects of SCT services and then asks riders to rate the aspects on a scale of 1 to 4; 1 is Poor, 2 is Fair, 3 is Good, and 4 is Excellent. Responses to each aspect of RTA services ranged from 53 to 58. The four highest rated aspects of RTA services are: (1) Time service begins in the morning at 3.7, (2) Closeness of bus stops to home at 3.7 and, (3) Courtesy and competency of drivers at 3.7, and (4) Safety on the vehicles and at stops at 3.7 as well. The two lowest rated aspects of SCT services are: (1) Crowding on buses at 3.4 and (2) Value of new buses at 3.4 as well. Overall, the 18 aspects recorded relatively high marks with rated 3.0 or higher. See Figure 3.14 below.

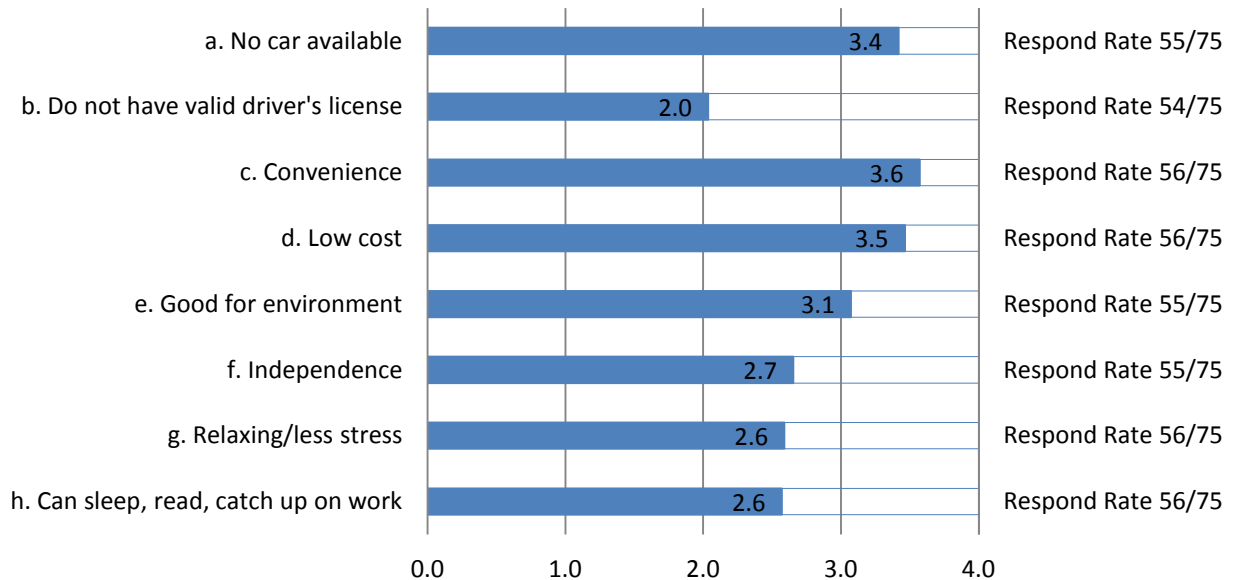
Figure 3.14: Q17. Please rate the following aspects of SCT



**Reasons for Use** Question #18 lists 8 reasons customers use SCT services and then asks riders to rate the reasons on a scale of 1 to 4; 1 is Least Important, 2 is Somewhat Important, 3 is Important, and 4

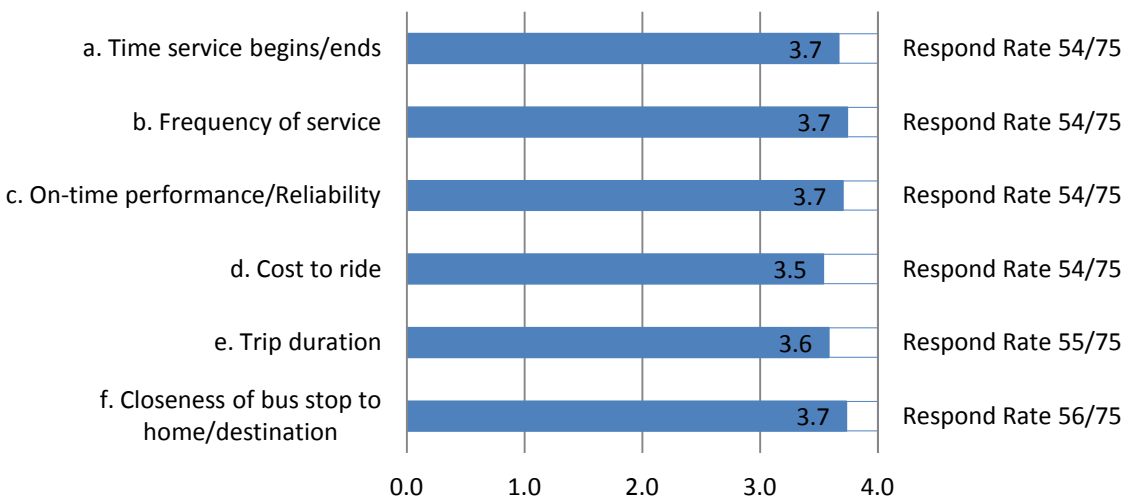
is Most Important. Responses to each aspect of RTA services ranged from 54 to 56. The two highest rated reasons customers use RTA services are: (1) Convenience at 3.6 and (2) Low cost at 3.5. The three lowest rated reasons customers use SCT services are: (1) Do not have a valid driver's license at 2.0, (2) relaxing/less stress at 2.6, and (3) Can sleep, read, catch up on work at 2.6 as well. See Figure 3.15 below.

Figure 3.15: Q18. Please rate the reasons you use SCT services.



**Attribute Importance** Question #19 lists 6 service attributes and then asks employees to rate the attributes on a scale of 1 to 4; 1 is Least Important, 2 is Somewhat Important, 3 is Important, and 4 is Most Important. Responses to each aspect of SCT services ranged from 54 to 56. The four highest rated service attribute are Time service begins/ends, Frequency of service, On-time performance/Reliability, and Closeness of bus stop to home/destination at 3.7. The lowest rate service attribute is Cost to ride at 3.3. Overall, employee rated the services attributes relatively high and with low variance among all six. See Figure 3.16 below.

Figure 3.16: Q19. Please rate the service attributes that are most important to you.

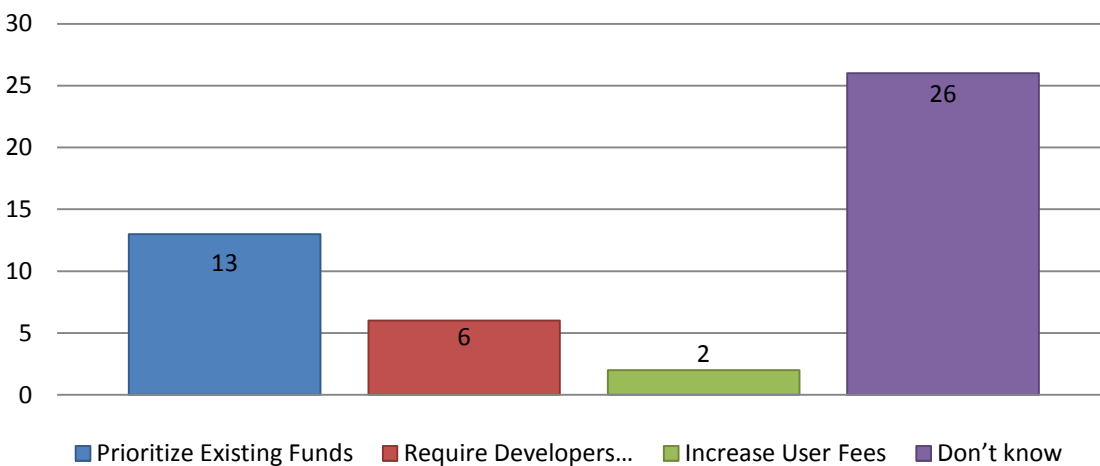


### Transportation Funding

The third section consists of four total questions that focus on collecting information regarding the rider's opinion of how transportation should be funded in San Luis Obispo County as well as their satisfaction level with alternative transportation options in the County.

**Funding Transportation Improvements** Question #20 asks riders to indicate how they think transportation improvements within the County of San Luis Obispo should be funded. Of the 54 that answered, 13 (24.1%) indicated Prioritize existing funds, 6 (11.1%) indicated Require developers to pay for improvements, and 2 (3.7%) indicated Increase user fees (i.e. bus fare). See Figure 3.17 below.

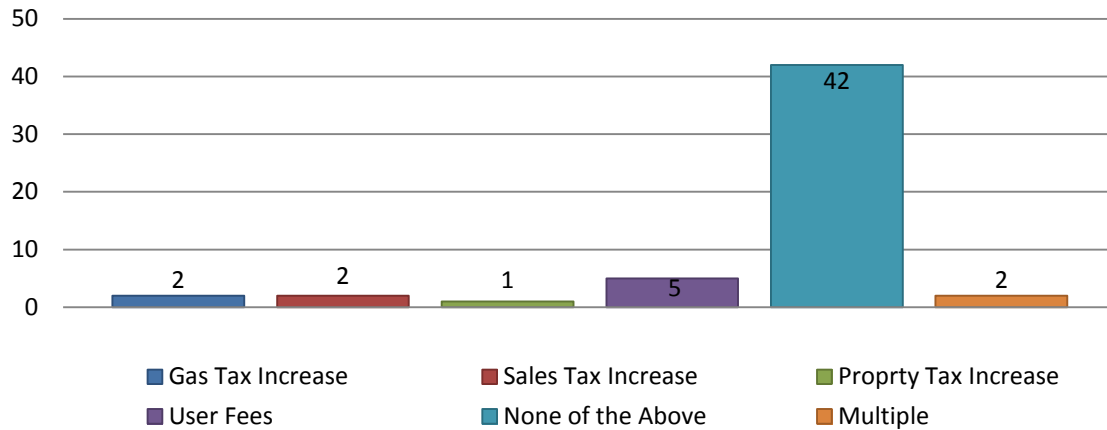
Figure 3.17: Q20. How should the County fund transportation improvements?



**Type of Tax** Question #21 asks riders to indicate what type of tax, if any, do they feel is most acceptable for transportation improvements. Riders were not directed to mark multiple answer

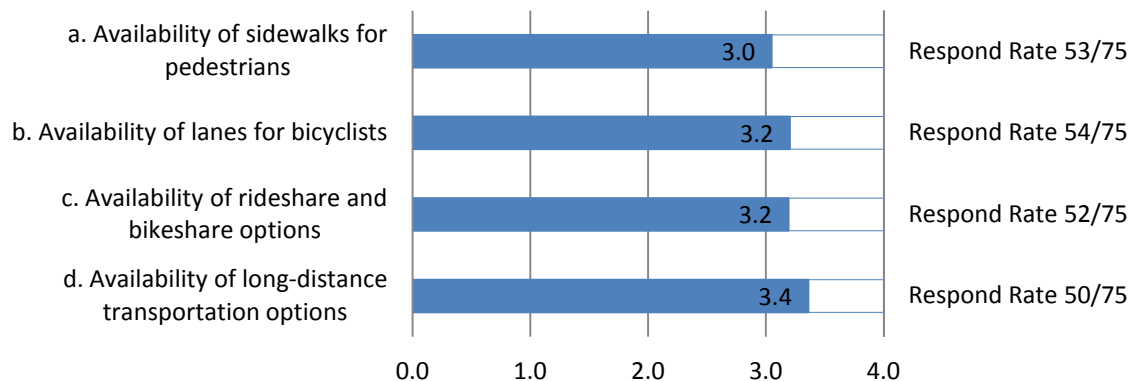
options but some did anyway. Of the 54 that answered, 42 (77.8%) indicated None of the above, 5 (9.3%) indicated User fees (i.e. bus fare), 2 (3.7%) indicated Gas tax increase, and 2 (3.7%) indicated Sales tax increase. See Figure 3.18 below.

Figure 3.18: Q21. What type of tax, if any, would be most acceptable for transportation improvements?



**Alternative Mode Rating** Question #22 lists four alternative modes of transportation within the County and asks riders to rate them on a scale of 1 to 4; 1 is Least Important, 2 is Somewhat Important, 3 is Important, and 4 is Most Important. See Figure 3.19 below. Responses to each aspect of RTA services ranged from 50 to 54. The highest rated alternative mode of transportation is Availability of long-distance transportation options at 3.4 while the lowest rated alternative mode of transportation is Availability of sidewalks for pedestrians at 3.0.

Figure 3.19: Q22. Please rate the satisfaction with alternative modes of transportation within the County.



**Ways to Improve** Question #23, the final question on the SCT rider survey form, is an open-ended question asking riders to comment in any way that they think will help to improve SCT services. Below are several rider comments regarding the existing SCT services and how they might be improved. See Appendix G for a list of all the open-ended question responses.

- I think having run more frequently every ½ hour



- Later times for bus to run daily
- 5:30 PM Saturday route 9 North from SLO Transit
- Have the trolley (free) to Avila Beach run Sat and Sun all 12 months please
- Every ½ hour instead of every hour extend service to 2 more hours

