



## REGIONAL TRANSIT AUTHORITY EXECUTIVE COMMITTEE AGENDA

PLEASE NOTE THE DATE, TIME, AND LOCATION:

**Wednesday, February 13, 2013**

**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 ADA Recertification & Other Potential Runabout Cost-Saving Measures (Information)
  - A-3 Summer Beach Shuttle (Information)
- 4. Action Items**
  - B-1 RTA Passenger Code of Conduct Policy (Approve)
  - B-2 RTA FY13-14 and FY14-15 Budget Assumptions (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 RTA Board and RTAC Stipend (Approve)

**5. Consent Items**

C-1 Executive Committee Meeting Minutes of December 12, 2012 (Approve)

**6. Agenda Review** – below are items that will be presented at the March 6, 2013 Board meeting:

Information Items

A-1 Executive Director's Report (Information)

A-2 ADA Recertification & Other Potential Runabout Cost-Saving Measures (Information)

A-3 Summer Beach Shuttle (Information)

Action Items

B-1 RTA Passenger Code of Conduct Policy (Approve)

B-2 RTA FY13-14 and FY14-15 Budget Assumptions (Approve)

B-3 RTA Board and RTAC Stipend (Approve)

Consent Items

C-1 Executive Committee Meeting Minutes of December 12, 2012 (Approve)

C-2 FTA Section 5316 JARC Resolution (Approve)

C-3 FTA Section 5311 Non-Urbanized Area Resolution (Approve)

C-4 RTA Board Meeting Minutes of January 9, 2013 (Approve)

C-5 RTAC Appointments (Approve)

Closed Session Items

D-1 It is the intention of the Board to meet in closed session concerning the following items:

CONFERENCE WITH REAL PROPERTY NEGOTIATOR

**7. Closed Session Items**

None

**8. Adjournment**

Next Executive Committee Meeting: **April 10, 2013**

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 13, 2013**

**STAFF REPORT**

**AGENDA ITEM:** A-1

**TOPIC:** Executive Director's Report

**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Information

**BACKGROUND/DISCUSSION:**

**Operations:**

In response to increasing demand on the Runabout service, staff will be providing an update on efforts to recertify existing eligible riders, as well as methods to increase efficiencies and other cost-saving alternatives. See item A-2 for details.

RTA celebrated its annual Safety Award program at the same time that we announced our quarterly Bus Operator of the Quarter on January 25<sup>th</sup>. We are proud to recognize Jewell Johnson as the Bus Operator of the Quarter. She was nominated by her peers for outstanding passenger relations and her willingness to help out others on the RTA team. Jewell typically drives the Route 12 runs in the afternoon, so please give her a hearty congratulatory wave if you see her driving on Route 1 between Morro Bay and San Luis Obispo.

RTA's previous Bus Operator training class began on September 4<sup>th</sup>, 2012. Due to a few recent departures and employees out on long-term leave, we have scheduled a new class of four recruits that will begin on February 25<sup>th</sup>. That is the longest period of time between classes that any current employee can recall. We expect the new trainees to be ready for revenue service in mid-April.

**Maintenance:**

We experienced an engine failure in bus 148, which has accumulated one million miles since it was placed in service in 1995. Due to the age and miles of this bus, as well as the fact that this bus is slated for replacement when the new Gillig low-floor buses begin arriving in April 2013, we have decided to forgo the ~\$12,000 cost to rebuild its engine. We anticipate incurring slightly higher overtime over the next couple of months for shop personnel in order to keep the remaining fleet in safe working order due to the loss of this bus.

**Service Planning:**

SLOCOG has recommended the award to RTA a total of \$10,000 in State Transit Assistance funds to plan for the eventual operation of an express service that would link the Five Cities area to downtown San Luis Obispo via State Route 227. Staff will keep your Board apprised as the stakeholder committee is assembled, and as service and capital alternatives are developed.

RTA staff continues to participate with stakeholders and the consultants engaged in the following planning efforts:

- North County Transit Plan – Staff continues to participate with staff from the cities of Atascadero and Paso Robles, as well as county staff, as this project moves forward.
- US 101 Bus Rapid Transit Study – Staff participated in the public meeting that was conducted on January 30, and we look forward to providing comments on the next study deliverable.

RTA continues to work with Cambria area officials to finalize plans for summer Cambria Trolley services.

Staff continues to work with SLOCOG and North County officials to develop final plans for the STA-funded Summer Beach program that will be implemented in June 2013. This service would provide three daily roundtrips / five days per week between Paso Robles / Atascadero and Cayucos via State Route 41. See item A-3 for further details.

Staff is proposing to seek FTA Section 5304 planning funds to conduct a joint Short Range Transit Plan study effort with San Luis Obispo Transit. This joint effort would permit us to better coordinate our service and capital plans, while also studying some of the impediments of travel between our two agencies' routes. SLO Transit's SRTP expires in FY13-14, while RTA's technically expires in FY14-15. However, RTA SRTP was based on data from FY07-08, and a significant number of changes occurred between the time the study effort began and when it was finally adopted in December 2010. RTA would act as the lead agency to submit the grant application before the April 2 deadline.

**Finance and Administration:**

Staff has assembled the fully-executed JPA documents for the County and six of the seven cities. Once the final city considers the JPA, RTA will have 30 days to submit the amended JPA to the Secretary of State. Staff will report back to the Board once this process has been completed.

Staff continues to investigate how pension reform and the Affordable Care Act will affect our business. We have participated in a number of webinars, and have researched data

provided by CalPERS and other sources. Staff will provide a summary to the Executive Committee at its April 2013 meeting.

RTA is developing a two-year operating budget (first year financially constrained; second year for planning purposes) as part of this annual effort, while also incorporating a rolling five-year capital plan. The budget assumptions document is included as item B-2. It is our hope that the RTA Board will formally adopt the two-year budget at its May 1 meeting.

Staff is proposing a new stipend policy for city jurisdiction members (\$100 per Board meeting and \$50 per Executive Committee meeting). In addition, staff is proposing to provide RTA passes to RTA Board members and to RTAC members as compensation for serving on behalf of RTA. See item B-3 for details.

At the January Board meeting, staff reported on the operations-based performance standards identified in the RTA Strategic Business Plan. Staff is now finalizing a report on remaining metrics, which we will provide to the Executive Committee at its April 10 meeting with the intent to report out at the May 1 Board meeting.

### **RTA Facility Planning**

SLO County Real Estate Services informed staff in late-December that they are unable to assist us valuating our current operations/maintenance facility. Staff worked with a commercial real estate broker to complete a market analysis, which suggested the purchase price option identified in our lease is close to the estimated value. Staff met with the property owner on January 25, but we were unable to agree on some of the terms in the sales agreement included in our lease. Staff will work with the broker to develop an alternate proposal in the coming weeks, and will request a closed session for the March Board meeting to review the proposal.

Staff will also work with the broker to assist us in developing a possible lease extension proposal. That proposal will be brought before the Board at its May meeting.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 13, 2013**

**STAFF REPORT**

**AGENDA ITEM:** A-2

**TOPIC:** ADA Recertification & Other Potential Runabout Cost-Saving Measures

**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Receive

**RTAC RECOMMENDATION:** Receive and Support

**BACKGROUND/DISCUSSION:**

Executive Summary

The Americans with Disabilities Act (ADA) of 1990 provides protection for persons with disabilities in a number of areas, such as employment, public accommodations and transportation. The transportation elements of the ADA directed transit agencies to make their fixed route service fully accessible, while requiring transit agencies to also provide complementary paratransit service to individuals who are unable to use accessible fixed route service. Specifically, complementary paratransit service must be provided within ¾ miles of fixed routes during the same days and hours. In addition, the ADA is clear that a pattern of trips denials is unacceptable, and the FTA has taken action against transit agencies that have experienced only a small number of denials. The ADA permits trip schedulers to negotiate travel times one hour on either side of the requested time, and our staff does a good job of accommodating requests within these parameters. The RTA's Runabout service is the complementary paratransit provider for all fixed route services in San Luis Obispo County.

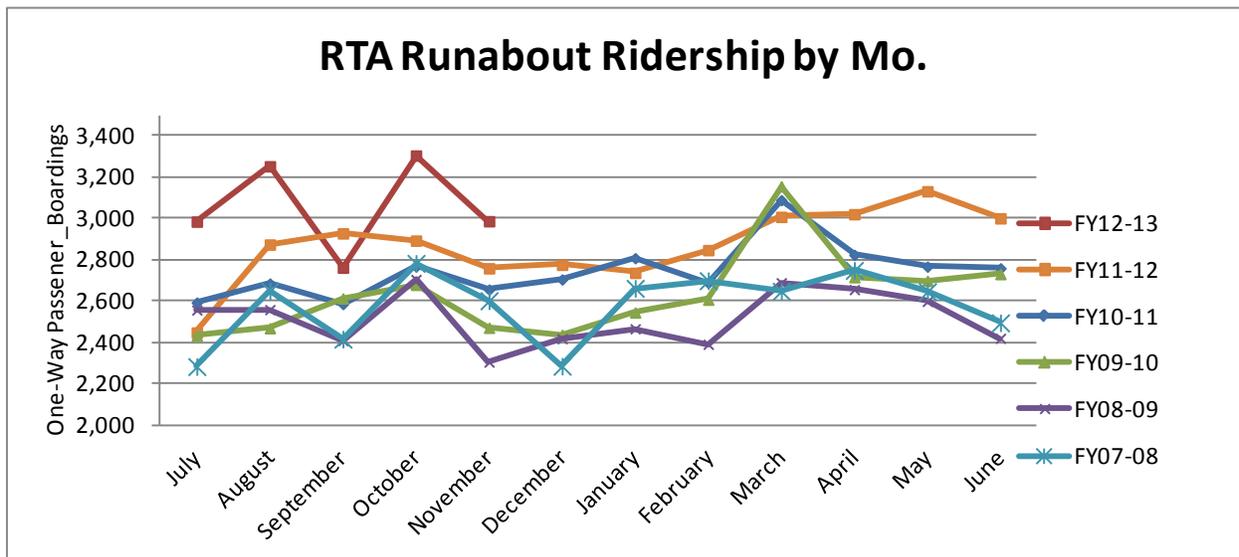
Demand for Runabout services is increasing and may soon outstrip the budgeted resources, despite staff's efforts to meet the demand for Runabout services in the a cost-effective and efficient manner. Staff is proposing to recertify current Runabout ADA eligible riders over a three-year period, and to implement the following in an attempt to control costs:

1. Fully Implement the No-Show Policy
2. Fund Fare-Free Fixed Route Service for Runabout Registrants
3. Formally Eliminate General Public Runabout Service

Staff will continue to monitor Runabout service levels and expenses to determine if a budget amendment might ultimately be needed

## Background and Current Runabout Challenges

Ridership on Runabout has increased steadily over the past several years and even more so in past 12 months. As depicted in the graph below, monthly Runabout ridership over the past five-plus years trends relatively closely by month, with the months of March and October tending to be the highest each fiscal year. Two record monthly ridership totals were recorded on Runabout in October 2012, followed by August 2012, March 2010 and May 2012 (three of the four highest months were in the past 12 months).



Year over year Runabout ridership and other operating information from FY07-08 to present is depicted in the table below. As shown, ridership on Runabout has increased almost every year, although it declined slightly from FY07-08 to FY08-09. As also shown, annual service hours have increased year over year to meet burgeoning demand, with a significant increase between FY10-11 and FY11-12. Based on discussions with Runabout schedulers, productivity has declined slightly in the past few years as the number of long Runabout trips throughout the county has increased. There are no indications that these trends will change in the near future, and this will have an adverse impact on financial resources. It should be noted that the Runabout service is deemed “at capacity” right now, and RTA has experienced significant overtime by Runabout drivers to meet this increasing demand.

Runabout Service Parameters					
Year	Runabout Ridership	Change from Prev. Yr.	Annual Service Hours	Change from Prev. Yr.	Productivity
FY07-08	30,917	N/A	15,644	N/A	2.0
FY08-09	30,174	-2.4%	18,467	18.0%	1.6
FY09-10	31,554	4.6%	19,833	7.4%	1.6
FY10-11	32,929	4.4%	21,128	6.5%	1.6
FY11-12	34,424	4.5%	23,790	12.6%	1.4

RTA's current FY12-13 budget identifies a total of \$2,351,598 for Runabout services, although increasing ridership trends suggest that amount may be insufficient; staff is monitoring those costs to determine if a budget amendment might be required before year-end. There are not a lot simple solutions that can significantly reduce this demand in the future, although there are some alternatives that we could implement to try to rein in demand, as described below.

#### Recommended Future Measures

##### *Recertify Runabout Eligibility*

RTAC has supported the concept of recertifying eligible Runabout riders to ensure that the service is provided to those that meet the eligibility requirements. This recertification effort will require significant staff time and coordination, and a preferred method used in the transit industry is to recertify one-third of registrants each year over three years to avoid unduly overwhelming staff resources. It is our intent to use existing staff members to complete the recertification process, and RTA will address how the staffing requirements will impact the budget during the FY13-14 budget-making process.

The RTA *Runabout ADA Paratransit Application* for service, as well as a Frequently Asked Questions brochure, is attached at the end of this document. As indicated, the five-page application focuses on functional abilities as it relates to the **inability** of the applicant to use fixed route services to meet all of his or her travel needs. This is not an exclusively self-determination process, since we require a doctor or case worker to complete the application. It should be noted that the ADA permits conditional certification based upon physical barriers or other environmental conditions (i.e., inclement weather) that prevent the person from using fixed route services for a particular trip. Conditional eligibility permits transit agencies to determine on a trip-by-trip basis if a complementary ADA paratransit trip should be provided. However, in practice, there are not any transit agencies – even very large ones – that have been fully successful in implementing conditional eligibility, since it typically requires specialized medical and vocational training for eligibility staff and schedulers that is beyond the resources available within a transit agency. As such, RTA either grants full eligibility or denies it based on the application.

Similar to the majority of transit agencies across the United States, eligibility determinations are made by RTA clerical staff whose primary experience is in the transit field rather than the disability or health care professions. The primary RTA staff person making these eligibility determinations has received training through a variety of means, including focused training classes, continual review of state of the practice reports, and through peer networking. However, given the substantial fiscal and social implications associated with false positive certifications, training eligibility certifiers to conduct accurate eligibility certifications becomes a significant issue. Nonetheless, staff is confident that we have developed a very cost-effective and defensible eligibility determination process, and that staff is doing a great job in this arena.

#### *Fully-Implement the No-Show Policy*

Staff is currently implementing a no-show policy that includes suspension of service in an attempt to reduce the frequency of riders that book trips but fail to show up for the ride. Passenger no-shows reduce efficiencies and potentially deny service to persons who otherwise might have preferred that time to travel. We have worked closely with our computerized dispatching software vendor in the past several months to enable us to effectively manage the policy, although we have struggled to meet our project milestones due to delays caused by the vendor. Nonetheless, it is anticipated that the no-show policy program will be fully implemented by the end of FY12-13.

#### *Fund Fare-Free Fixed Route Service for Runabout Registrants*

Another option to reduce demand is to provide reduced or free fixed route fares to encourage fixed route travel by ADA paratransit registrants. As mentioned above, RTA either grants full eligibility or denies it, with the realization that some riders might be capable of using fixed route services for one or both legs of their roundtrip. With the understanding that the per passenger cost on Runabout is roughly twelve times that of the per passenger cost on fixed route services, RTA and SCAT implemented a program whereby persons showing an ADA eligibility card can board fixed routes buses for free. In order to further relieve the burgeoning demand for Runabout services, we are proposing that the other fixed route transit operators in the county do the same. Under this scenario, RTA would provide as compensation the Average Passenger Fare<sup>1</sup> multiplied by the number of ADA eligible passenger boardings; this would be reconciled on a monthly or possibly quarterly basis. The recent incorporation of GFI fareboxes by RTA and SCAT can simplify this process, since SLO Transit already has GFI fareboxes. However, we would have to devise a method to account for local fixed route use on the Paso Express, Morro Bay fixed route, and Atascadero El Camino Shuttle services.

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<sup>1</sup> "Average Passenger Fare" is defined as the total fixed route passenger fares reported in the transit operator's previous State Controller Report divided by the number of passengers.

### *Formally Eliminate General Public Runabout Service*

Although RTA marketing materials continue to state that Runabout service is provided on a space-available basis, in reality RTA has not been able to accommodate a general public request in over two years due to a lack of capacity to carry general public riders. As such, staff recommends that we conduct a public outreach effort in the coming months to solicit input from the community regarding the formal elimination of this language from all marketing materials. Even though this will not technically result in any cost savings – since we would not be reducing service levels – formally eliminating the notion that general public dial-a-ride service is available in our marketing materials might clear up some confusion and/or expectations of service by would-be general public riders.

### Other Potential Future Measures

1. *Implement a travel training program* – this type of program provides one-on-one outreach to ADA eligible riders to encourage them to use fixed route when conditions permit. There has been varied success of this type of program, although there are firms that specialize in providing this service on a consulting or train-the-trainer basis.
2. *Work toward trip-swapping with Ride-On* – since both RTA and Ride-On recently implemented RouteMatch computerized dispatching systems, there is a possibility of viewing each others' trip manifests electronically. Under this scenario, if one agency has unscheduled or difficult-to-schedule trips on a particular day, we could see if the other agency could group it with an already scheduled trip. We have begun discussions and will continue to work with RouteMatch to determine if this coordination is possible and what sorts of resource commitments are feasible.
3. *Implement a subsidized taxicab program* – this has been implemented in a number of areas throughout the United States, with varying degrees of success. In some cases, local taxicab licensing jurisdictions have required taxicab companies to utilize accessible minivans in a portion of their fleet. In others, the transit agency acts as a broker and attempts to schedule ambulatory riders in traditional taxicabs. Some of the challenges are getting the taxicab companies to comply with FTA-required drug and alcohol testing programs, as well as resistance by transit unions to replace work that might have been provided by covered employees.

4. *Eliminate or reduce subscription trips* – RTA currently permits riders who have regular trips (i.e., a job with regular hours throughout the week) to schedule on-going trips on a subscription basis. These types of trips can be efficiently scheduled when grouping with other riders is possible. Subscription service is permitted under the ADA, but it is not required. Reducing or eliminating the subscription program will make the service less desirable for riders, since they will have to call to schedule trips on a more frequent basis and they might choose another travel option (if available/possible).
5. *Reduce the booking window* – our current policy permits riders to schedule trips up to seven days in advance, although the ADA only requires next-day scheduling. It should be noted that schedulers can typically more effectively group trips when a longer booking window is provided, so the productivity of a next-day scheduling scenario tends to be relatively lower in comparison. Next-day scheduling might also require additional Runabout scheduler resources in comparison to a seven-day booking system, since the requests tend to come in right before the scheduling window closes (5:00 PM the day previous to service).
6. *Call-backs for next-day rides* – another option is to take requests until 5:00 PM, then the schedulers would group the trips for the next service day; the schedulers would then be forced to call each rider back to tell him or her exactly when they are scheduled to ride the next day – taking into account the one-hour scheduling window permitted under the ADA. This tends to result in very efficient grouped trips for each driver, although there tends to be a very low satisfaction rate by riders, since they do not know the details of their trip until the night before they ride. It also results in challenges for riders whose return leg of their roundtrip cannot be scheduled exactly (i.e., a doctor appointment that might go longer than expected).

Another cost-saving measure that was not discussed at RTAC, but might be worthy of future consideration is conversion of the RTA Route 15 service along the North Coast to a route deviation service. In essence, the Route 15 service would deviate up to  $\frac{3}{4}$ -mile from the Route 1 corridor, thereby eliminating the need for Runabout complementary paratransit service between Morro Bay and the Hearst Castle. Route 15 and accompanying Runabout service is currently being partially funded with a Jobs Access Reverse Commute grant that expires at the end of FY13-14, so any changes would likely need to occur after that since-eliminated JARC funding program grant is fully expended.



SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY
ADA PARATRANSIT
RUNABOUT APPLICATION

INSTRUCTIONS FOR APPLICANT

- Complete Pages 1 - 4 with YOUR information. Be sure to sign Page 4.
Take all 5 pages of your application to a medical professional/doctor/case worker familiar with your disability.
When the medical professional/doctor/case worker has complete Page 5, they will return your application to you.
When your application is completed (Pages 1, 2, 3, 4 and 5) send the original BY MAIL to RTA at:

179 Cross Street, Suite A
San Luis Obispo, CA 93401

- Only original copies will be processed. Copies/faxes will be returned to you and will not be processed.
You will be notified of RTA's decision within 21 days of receipt of your complete application.
If you have questions, please call RTA at (805) 781-4833.

PART 1: YOUR CONTACT INFORMATION

Name: Last First M.I.

Address:

City: State: ZIP:

Mailing Address (if different):

City: State: ZIP:

Phone (Home): (Work):

Email: Date of Birth:

Emergency Contact Person:

Phone (Home): (Work):

Relationship to Applicant:

OFFICE USE ONLY
Application Revised August 2010
Complete Application Received Date Form Reviewed Date
Eligibility Approved YES NO Exp. Entered in System Date

**PART 2: INFORMATION ABOUT YOUR DISABILITY**

**Does your disability prevent you from using the fixed route bus service by yourself?**

- Yes       No

**What is the name of the disability or condition(s) that prevent(s) you from using the regular (fixed route) bus?**

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**Please explain how your disability or condition prevents you from using the fixed route bus?**

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**Do you use a service animal?**

- Yes       No

**If YES, what type of service animal is it and what task was the animal trained to perform?**

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**Do you use any of the following mobility aids (check all that apply)?**

- Manual Wheelchair       Cane       Powered Scooter  
 Powered Wheelchair       Walker       Portable Oxygen  
 Other, Please explain: \_\_\_\_\_

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**Will you travel with a Personal Care Attendant?**

- No, Never       Yes, Always  
 Sometimes

**Explain:**

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**PART 3: INFORMATION ABOUT YOUR TRAVEL ABILITIES**

*Be sure to answer all questions on this page completely.*

**What is the closest bus stop to your home? (Please give an intersection)**

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**Can you get to the bus stop nearest to your home by yourself?**

Yes       No

**If no, why not?** \_\_\_\_\_

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**Can you walk  $\frac{3}{4}$  of a mile or more by yourself? Or can you propel yourself  $\frac{3}{4}$  of a mile by yourself in a wheelchair if you use a wheelchair?**

Yes       No

**If no, please explain:** \_\_\_\_\_

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**Do you have a visual impairment that prevents you from seeing/recognizing your bus and/or destination?**

Yes       No

**If yes, please describe your visual impairment:** \_\_\_\_\_

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**Can you understand and follow directions to get to your destination?**

Yes       No

**If no, please explain:** \_\_\_\_\_

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**Are you able to board a bus equipped with a wheelchair lift or that has the capability of lowering the front steps?**

Yes       No

**If no, please explain:** \_\_\_\_\_

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**PART 4: APPLICANT CERTIFICATION**

I understand that the purpose of this application is to determine if I am eligible for RTA’s Runabout paratransit services and that RTA staff may need to talk to me later to get more information. Additionally, I understand that eligibility for ADA paratransit certification is based only on my functional abilities as they relate to accessing and riding the fixed route bus services; I understand that disability and/or age do NOT automatically make me eligible for paratransit certification.

By signing this application, I certify that I have been truthful in answering this form and that the information provided is correct to the best of my knowledge. I understand that falsification of this information could result in a loss of ADA certification.

\_\_\_\_\_  
Signature Date

**PART 5: APPLICANT AUTHORIZATION FOR RELEASE OF MEDICAL INFORMATION**

I authorize the following professional to release to RTA information about my disability and health condition and its effect on my ability to travel on RTA buses. I understand that RTA staff may need to contact my medical professional later to get more information.

All medical information, which you or your healthcare professional provide, will be kept confidential to the extent permitted under the law except that information may be shared with other professionals or agencies involved in the determination of your eligibility.

\_\_\_\_\_  
Signature Date

**PART 6: TO BE COMPLETED ONLY IF ANOTHER PERSON HELPED THE APPLICANT IN THE COMPLETION OF THIS FORM.**

Name of person giving assistance: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Phone (Home): \_\_\_\_\_ (Work): \_\_\_\_\_

Relationship to Applicant: \_\_\_\_\_

**PART 7: MEDICAL PROFESSIONAL CERTIFICATION**

**INSTRUCTIONS FOR THE MEDICAL PROFESIONAL**

The Applicant, \_\_\_\_\_ (write the applicant’s name), has indicated that you can provide information regarding his/her health condition and its impact on his/her ability to utilize the fixed route transit system. Federal law requires that all transit entities operating a public fixed route transit system must provide a comparable paratransit service to persons who cannot utilize available fixed route services due to disability. The information you provide will allow RTA to appropriately evaluate this application.

When you have completed this page, return the ORIGINAL copy to the Applicant. They will submit this application to the Regional Transit Authority. No copies, faxes, or incomplete applications will be processed.

Thank you for your cooperation.

*The following questions must be answered in order for the application to be processed.*

**Question #1** Have you treated the Applicant?  
 Yes       No

**Question #2** Are you familiar with the Applicant’s functional abilities?  
 Yes       No

**Question #3** Is the Applicant functionally prevented from riding on the normal fixed-route bus service because of a disability or health condition?  
 Yes       No

**If the answer to Question #3 is YES, please complete the following:**

State the Applicant’s disability/health condition (all that apply):

\_\_\_\_\_  
\_\_\_\_\_

The expected duration of the Applicant’s disability/condition is: \_\_\_\_\_

The Applicant’s health condition prevents them from (check all that apply):

- \_\_\_\_\_ Navigating the system (knowing when/where to board/disembark)
- \_\_\_\_\_ Riding in a vehicle that is not lift equipped
- \_\_\_\_\_ Travelling independently to and from bus stops.

**Name/Title:** \_\_\_\_\_

**Office Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_ **ZIP:** \_\_\_\_\_

**Office Telephone Number:** \_\_\_\_\_

**License/Certification Number:** \_\_\_\_\_

\_\_\_\_\_  
**Signature** **Date**



## Frequently Asked Questions

### What is ADA complementary paratransit?

The Americans with Disabilities Act (ADA) is a Federal Law that requires public transit agencies that provide fixed-route service to provide “complementary (equivalent) paratransit” services to people with disabilities who cannot use the fixed-route bus because of a disability. ADA complementary paratransit service must be provided within 3/4 of a mile of a bus route, at the same hours and days, for no more than twice the regular fixed route fare.

### What is Runabout?

Runabout is the name of the ADA Paratransit Service for San Luis Obispo County. Runabout is an “origin to destination” service, meaning that Runabout will take riders directly from their starting location to their destination and back, if required. Riders will be given a “window” of time during which they must be ready to be picked up. A Runabout vehicle may arrive anytime during that “window”. Runabout drivers will assist passengers in getting on and off the bus; however they are not permitted to cross the threshold of any personal residence.

### How do I schedule my rides?

Riders may make reservations up to seven (7) days in advance (recommended), but no later than 5:00 PM the day before their planned trip. To make a reservation, please call Runabout Dispatch at (805) 541-2544 between the hours of 8:00 AM and 5:00 PM, seven days a week.

### How much does Runabout cost?

The cost of a trip on Runabout is twice the cost of the same trip if it were taken on the fixed-route system. For specific trip pricing, please call 541-2544. For your convenience, Punch Passes, good for thirty dollars (\$30) worth of rides, can be purchased and used on Runabout.

### Can I have an attendant or companion?

Runabout clients are allowed to have one (1) free personal care attendant (PCA). A PCA can be anyone that assists the rider; however PCA's cannot be in a wheelchair. Anyone traveling as a companion without providing needed assistance to the client must pay the full fare. Additionally, if there is a second PCA, that person is also required to pay a full fare. If you will be travelling with a PCA, be sure to tell the dispatcher that this will be the case. Children six years old and younger are allowed to ride for free with a paying adult.

### Who can ride Runabout?

The ADA requires that paratransit rides be provided to all eligible riders if requested within seven (7) days prior to their requested trip (up to 5:00 PM the previous day). Anyone can ride Runabout; it is available to the General Public. However only riders who meet the criteria specified by the ADA and have been certified as eligible will have a guaranteed ride.

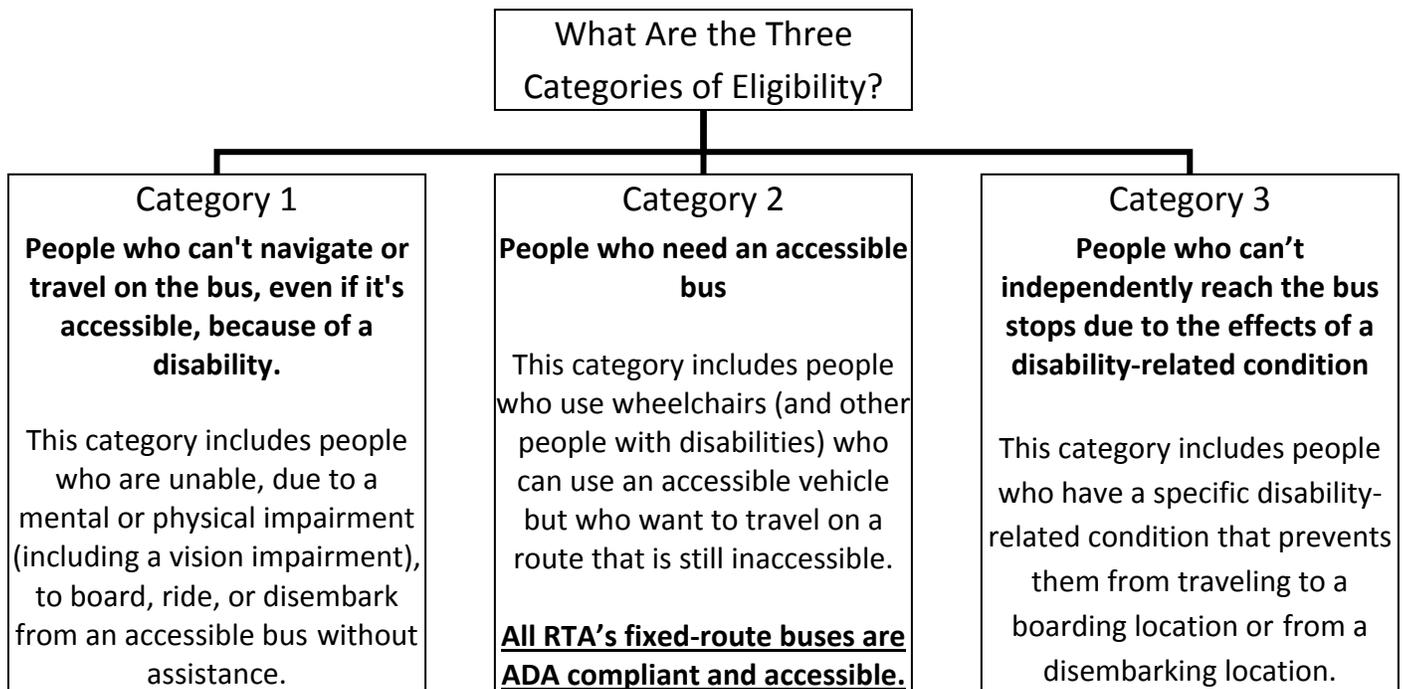


## Frequently Asked Questions

### Who is eligible for ADA certification?

The ADA law mandates that paratransit be made available to those persons whose disability PREVENTS them from using accessible fixed-route bus services.

- This does not include people who find it uncomfortable, inconvenient or somewhat difficult to get to or from fixed route bus services.
- Persons do not qualify for ADA certification automatically because they have a disability or due to age.
- ADA certification is based on a person's functional (physical or cognitive) limitations in riding or reaching the fixed-route system. There are three specific categories of eligibility used in determining a person's functional limitations.



### How Do I Get Certified?

Applications can be found on our website [www.slorta.org](http://www.slorta.org) or by calling (805) 781-4833 to have one mailed.

Fill out the Runabout Application (the first four pages are applicant information to be filled out by the applicant or a representative. The fifth page is to be filled out by a medical professional or case worker familiar with the applicant and their condition). Completed original applications must be submitted by mail to the RTA office (179 Cross Street, Suite A, San Luis Obispo, CA 93401). RTA will review and process the application, and the applicant will be notified of a decision within twenty-one (21) days of RTA's receipt of the application.

If you have any remaining questions about ADA paratransit, Runabout, or the application process, please call RTA administration at: (805) 781-4833

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 13, 2013**

**STAFF REPORT**

**AGENDA ITEM:** A-3

**TOPIC:** Operating Plan for Summer Beach Shuttle from June 7 – August 24, 2013 on a trial basis

**ACTION:** Receive Operating Plan, and authorize staff to proceed with development of final Institutional Plan

**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Authorize staff to develop Institutional Plan

**RTAC RECOMMENDATION:** Will be presented at April 17 RTAC meeting

**BACKGROUND/DISCUSSION:**

In the past two years, the City of Paso Robles has sought local funding for a Summer Beach Shuttle program that would provide more convenient transit access to the cooler coastal region. Transit riders currently have the option of taking hourly service on RTA Route 9 to San Luis Obispo (greater than 60 minutes of travel time), and then they must connect to the hourly RTA Route 12 service, which takes an additional 30 minutes of travel time to reach Morro Bay. Less frequent connections are available on RTA Route 15 northward towards Cayucos and Cambria. Given the long travel time, just to get to Morro Bay, more convenient service is worth consideration.

The question is whether the perceived demand can be provided with an efficient and attractive enough service to cover an acceptable proportion of operating costs.

SLOCOG has agreed to fund a first year trial of the operations with \$40,000 in State Transit Assistance funding.

Using that funding, RTA proposes to run service on three roundtrips per day, five days per week, Tuesday through Saturdays. The service would begin on Friday, June 7, 2013, and run through Saturday, August 24, 2013. Please see the attached proposed timetable for more details.

Staff recommends proceeding with this service on a trial basis, based on the Operating Plan that is described above. In order to best determine the Summer Beach Shuttle's success or shortcomings, staff is recommending the following measurable ridership and revenue goals, as described below:

- Ridership – 9.5 passengers per service hour / 60 passengers per day, which equates to 3,450 trips for the summer 2013 season.
- Farebox Revenues: It is anticipated that the Summer Youth Ride Free Program will be continued throughout the county in 2013, and therefore revenue from fare-paying adults on this service will be relatively low, due to an expected high proportion of youth riders. However, if ridership targets are met, RTA expects about 30% of riders to be non-youth, and paying the \$5 round-trip Day Pass rate. This would achieve \$2,588 in revenue (equating to ~6% in farebox recovery) for the first year of service. Staff believes that ensuring there is appropriate demand for the service is important, prior to setting higher revenue targets for ensuing summer seasons. If the demand is proven after the first summer, discussions can entail about whether or not the service would qualify for continued STA or other new funding, and/or if we should seek additional advertising support from community partners (that would count as farebox revenue).

Staff would provide a report on the performance of the Summer Beach Shuttle in comparison to these goals at the November 6 RTA Board meeting.

To ensure the success of the Summer Beach Shuttle, staff is currently working to finalize the following Institutional Plan elements:

- Community Support: Staff expects that the new service will be appealing to many summer youth (and possibly even senior) group programs. Ridership support is important, but it is probably more important to gain participation in travel training programs that include information on how to ride transit and available schedules throughout local cities and the county, what types of fare media are available and how to use them, and etiquette about riding the bus (keeping voices low, avoiding loud cell phone conversations, sharing seats with those in greater need, boarding in the front and exiting in back, etc.). In particular, community support will also be expected from schools and community groups (i.e., YMCA, Boys & Girls Clubs, Church Groups ) to actively take part in these training outreach programs to ensure success in attaining the ridership performance measures presented above. Further support will be sought to help commit funding for future years of service if the program is initially proven successful and valuable to residents in the North County.
- Operated by RTA or Ride-On: Staff is discussing with Ride-On the possibility of using Ride-On vehicles and drivers to operate this service using one of their medium-size body-on-chassis vehicles. Those 28-foot buses could be operated at a lower cost than RTA's standard 40-foot buses, and might be optimally operated for at least two of the three daily roundtrips (the evening trip might need the capacity of a full-size 40-footer). Staff from RTA and Ride-On are currently defining the optimal institutional plan, and will report back to the Board at its May meeting.

**Staff Recommendation:**

Receive this report and authorize staff to continue negotiations with Ride-On for possible full or partial operation of the Summer Beach Shuttle. Final operating and institutional plans will be provided at the May 1, 2013 RTA Board meeting.

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 13, 2013**

**STAFF REPORT**

**AGENDA ITEM:** B-1

**TOPIC:** Passenger Code of Conduct

**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Adopt Passenger Code of Conduct Policy

**BACKGROUND/DISCUSSION:** As presented at the January 9 RTA Board meeting, RTA does not currently have a written policy to address behavioral problems that occur on transit property. When behavior is especially egregious on RTA property, our Dispatchers enlist the assistance of law enforcement officials. This recommended policy will address behavior that might not quite rise to the level of criminal activity yet the unwanted behavior directly impacts our employees and in some cases might dissuade riders from choosing public transportation as a viable travel alternative.

This policy document is largely based on the one adopted by City of San Luis Obispo for its transit system in June 2000. Not only is the SLO Transit conduct policy a great document, but using it as a basis for our own policy will provide consistency in terms of expectations for passengers across the region. The final policy document was refined after consulting with our employees, other transit providers in the region, the RTAC at its January 16 meeting, and RTA Legal Counsel.

The final RTA Passenger Code of Conduct policy incorporates input received. Any additional language is highlighted/underlined, while any suggested deletions are highlighted/struck-through. In general, input was focused on elevating fifth or greater minor infractions and third or greater major infractions directly to the highest disciplinary action (instead of starting over). In addition, staff recommends identifying that RTA will seek a court restraining order for criminal behavior that could potentially impact Bus Operators or other RTA staff members.

**Staff Recommendation**

Adopt the Passenger Code of Conduct policy as presented.

# SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY PASSENGER CODE OF CONDUCT POLICY

## ARTICLE I, PURPOSE

Behavior on transit property is governed by California Penal Code 640 and other statutes. The purpose of this document is to establish the San Luis Obispo Regional Transit Authority (RTA) policy and procedures governing passenger conduct on RTA property and associated limitations on access to RTA property as a result of infractions of acceptable conduct as described herein.

## ARTICLE II, BACKGROUND

RTA is the intercity fixed route and demand response public transit service provider in San Luis Obispo County. RTA is a qualified Federal Transit Administration grantee, and works closely with the San Luis Obispo Council of Governments to plan for Federally-funded public transit services in the region. RTA's role as a public agency is to treat all citizens, groups, and political jurisdictions equally.

Proper passenger behavior on RTA property is essential for providing quality service to the members of our community and for ensuring safety for all transit patrons and RTA employees. Establishing a passenger code of conduct and an associated disciplinary process is a necessary component to maintain the existing high levels of service for all transit patrons.

RTA is governed by its 12-member Board of Directors, comprised of the five San Luis Obispo County Supervisors and elected officials from Arroyo Grande, Atascadero, Grover Beach, Morro Bay, Paso Robles, Pismo Beach and San Luis Obispo. The Board is charged with budget-making and policy development responsibilities.

## ARTICLE III, DEFINITIONS

1. "RTA property" means the transit vehicles, and bus stops and other passenger public transportation system facilities owned, leased or operated by RTA. A facility or vehicle of a "Public transportation system" is defined by Section 99211 of the Public Utilities Code.
2. "RTA employee" means all duly authorized RTA staff members, including drivers, supervisors, managers and contracted employees.

## ARTICLE IV, SUSPENDABLE BEHAVIOR

Table 1 lists activities and descriptions of behaviors that are either expressly prohibited or allowed on RTA property. Unless otherwise deemed a "Major Infraction" below, suspendable behavior will be considered a "Minor Infraction."

Table 1 – RTA Passenger Code of Conduct

Type of Conduct	Transit Vehicles	Passenger Facilities
(1) Displaying or offering for sale, selling, or distributing goods or services.	Prohibited, except by written agreement	Prohibited, except by written agreement
(2) Distributing literature.	Prohibited	Prohibited
(3) Posting or affixing leaflets or signs to transit property.	Prohibited	Prohibited
(4) Performing instrumental/vocal music.	Prohibited	Allowed
(5) Transporting animals.	Prohibited, except in a secure container, or a service animal	Prohibited, except in a secure container, or a service animal as defined in 49 CFR Section 37.3
(6) Skateboarding, roller skating, bicycle riding, or rollerblading in a system facility, vehicle, or parking structure <sup>1</sup> .	Prohibited	Prohibited
(7) Drinking non-alcoholic beverages or eating.	Prohibited, except drinking from a container with an attached lid designed to prevent spillage when held upside down	Allowed
(8) Drinking alcoholic beverage or possessing an open container of same. ( <b>MAJOR INFRACTION</b> )	Prohibited	Prohibited
(9) Willfully blocking the free movement of another person in or on RTA property, including placing objects that block aisles, stairways or seats <sup>2</sup> .	Prohibited, except at driver's discretion if space allows; strollers must be folded prior to boarding	N/A
(10) Loitering or storing personal property <sup>3</sup> .	Prohibited	Prohibited

<sup>1</sup> This paragraph does not apply to an activity that is necessary for utilization of the transit facility by a bicyclist, including, but not limited to, an activity that is necessary for parking a bicycle or transporting a bicycle aboard a transit vehicle, if that activity is conducted with the permission of RTA in a manner that does not interfere with the safety of the bicyclist or other patrons of the transit facility.

<sup>2</sup> This paragraph shall not be interpreted to affect any lawful activities permitted or first amendment rights protected under the laws of this state or applicable federal law, including, but not limited to, laws related to collective bargaining, labor relations, or labor disputes.

<sup>3</sup> Loitering is defined as riding the same bus in excess of one continuous trip or remaining on RTA property for more than two successive hours.

<b>Type of Conduct</b>	<b>Transit Vehicles</b>	<b>Passenger Facilities</b>
(11) Extending anything out windows or doors of moving bus.	Prohibited	N/A
(12) Hanging off or swinging from bars or stanchions (except when standing-only conditions apply).	Prohibited	Prohibited
(13) Smoking.	Prohibited	Prohibited
(14) Littering.	Prohibited	Prohibited
(15) Using sound-producing equipment (use of headphones is permissible if others cannot hear the output).	Prohibited	Prohibited
(16) Spitting, urinating or defecating <sup>4</sup> ; or creating unsanitary conditions through presence of blood, urine, feces, vomit, or other bodily fluids. <b>(MAJOR INFRACTION)</b>	Prohibited	Prohibited
(17) Carrying an explosive or acid, flammable liquid, or toxic or hazardous material in or on RTA property. <b>(MAJOR INFRACTION)</b>	Prohibited	Prohibited
(18) Interfering with the provision of transportation services (i.e., failure to properly board or alight, blocking progress of a transit vehicle, disturbing the driver, etc.).	Prohibited	Prohibited
(19) Willfully disturbing others in or on RTA property by engaging in boisterous or unruly behavior.	Prohibited	Prohibited
(20) Defacing, destroying or otherwise vandalizing transit property or any sign, notices or advertisements thereon. <b>(MAJOR INFRACTION)</b>	Prohibited	Prohibited
(21) Throwing objects at transit property or at persons in or on transit property. <b>(MAJOR INFRACTION)</b>	Prohibited	Prohibited
(22) Failure to pay the appropriate fare or present a valid pass, presenting an invalid pass or transfer, or failure to surrender an invalid pass if demanded by an authorized RTA employee. <b>(MAJOR INFRACTION)</b>	Prohibited	Prohibited

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<sup>4</sup> This paragraph shall not apply to a person who cannot comply with this paragraph as a result of a disability, age, or a medical condition.

Type of Conduct	Transit Vehicles	Passenger Facilities
(23) Misrepresenting oneself as eligible for special or reduced fares or transfers <sup>5</sup> . <b>(MAJOR INFRACTION)</b>	Prohibited	Prohibited
(24) Failure to follow lawful direction from an RTA employee.	Prohibited	Prohibited
(25) Bringing onto RTA property odors which unreasonably disturb others or interfere with their use of the RTA system, whether such odors arise from one's person, clothes, articles, accompanying animal or any other source.	Prohibited	Prohibited

ARTICLE V, CONSEQUENCES OF VIOLATING CODE OF CONDUCT

In addition to the types of suspendable behavior described above, criminal conduct, including but not limited to, assault, disorderly conduct, and illegal drug use, are prohibited on all RTA property. If any criminal conduct is observed, RTA will contact the appropriate law enforcement department within the jurisdiction in which the offense has occurred.

In addition to civil and criminal penalties, violators of the RTA Code of Conduct policies and/or any other applicable laws may be subject to immediate denial of RTA service and possible suspension of RTA service in the future as described in Table 2 below. **Additionally, RTA reserves the right to seek an immediate restraining order against accused violators deemed by the RTA Executive Director to pose a legitimate threat to the safety or welfare of RTA staff or riders.**

Immediate denial of RTA service may be effected by a law enforcement officer or any RTA employee. Failure to comply with denial of service or suspension of service shall be grounds for criminal trespass prosecution. For initial minor infractions, patrons of RTA service who have been denied or removed from service must petition (either verbally or in writing) to the RTA Operations Manager in order to resume transit service privileges.

For repeat or major offenders, the RTA Operations Manager shall issue a written notice stating the cause and duration of the suspension and the process for requesting review. Suspension shall be in effect upon issuance of the notice and shall remain in effect during any review process.

Within ten business days after issuance of a service suspension notice, the offender may deliver to the RTA Operations Manager a written request for review of the suspension and an opportunity to present reasons for reconsideration of the suspension. Within ten business days

<sup>5</sup> In the event that an eligible discount **ticket user fare rider** is not in possession of acceptable proof at the time of request, any suspension of service shall be held for a period of 72 hours to allow the user to produce acceptable proof to the RTA Operations Manager. If the proof is provided, the suspension shall be voided. If the proof is not produced within that time period, the suspension will be enforced.

after receiving a request for review, the RTA Executive Director shall set a telephonic or in-person hearing to review the RTA Operations Manager’s decision with the accused. The hearing shall be held within ten business days following the request for a hearing. The RTA Executive Director then shall decide to affirm or reverse the suspension within ten days following the public hearing. The RTA Executive Director’s decision shall be final.

Table 2 – Disciplinary Actions

<b>Type</b>	<b>Disciplinary Action</b>	<b>Disciplinary Review Process to Return Service Privileges</b>
(1) 1st Infraction (Minor)	Immediate denial of service	Petition RTA Operations Manager
(2) 2nd Infraction (Minor)	Same as (1), plus: suspension of service privileges for a period not to exceed seven days	Petition RTA Operations Manager
(3) 3rd Infraction (Minor) or 1st Infraction (Major)	Same as (1), plus: suspension of service privileges for no less than seven days and no longer than 30 days	<b>Public</b> Hearing by RTA Executive Director after disciplinary process
(4) 4 <sup>th</sup> <b>or greater</b> Infraction (Minor), <del>or</del> 2nd <b>or greater</b> Infraction (Major), <b>or criminal behavior</b>	Same as (1), plus: suspension of service privileges for 180 calendar days	<b>Public</b> Hearing by Executive Director after disciplinary process

**SAN LUIS OBISPO REGIONAL TRANSIT AUTHORITY**

**February 13, 2013**

**STAFF REPORT**

<b>AGENDA ITEM:</b>	<b>B-2</b>
<b>TOPIC:</b>	<b>Fiscal Years 2014 and 2015 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 and FY15 Operating Budget</b>

**BACKGROUND/DISCUSSION:**

The following report outlines staff's budget assumptions recommendation for RTA's Fiscal Year 2013-14 and 2014-15 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 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 10<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 2013-14 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.

**Revenue**

- SLOCOG has projected a decline in State Transit Assistance (STA) funding for FY13-14 in comparison to FY12-13. Once those targets are more firmly established, RTA will assume a proportional decrease in overall STA funding in our FY13-14 budget, and will budget the same amount for FY14-15.

- Fare revenue is projected to be \$1,100,000 (farebox and pass sales revenue only) for FY13-14. We are not recommending a fare program change for FY13-14, although we may have to consider changes in FY14-15 if funding shortfalls emerge or farebox recovery projections fall short. Based on recent farebox revenue trends, staff expects annual farebox revenues to total \$1,115,000 for FY14-15 (a ~5% increase over FY13-14). If the release of funding estimates in April-May suggests that other fare changes should be instituted, staff will make that presentation at a future Board meeting.
- Federal Transit Administration (FTA) Section 5307, 5311 and 5339 operating and capital funding for both fiscal years shall remain consistent with FY12-13 levels. Should authorizations for federal transportation programs under MAP-21 or its successor legislation in FY14-15 increase or decrease for any of these programs, staff would adjust these assumptions accordingly.
- 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 FY12-13 levels.
- FY12-13 LTF revenue was budgeted at \$3,323,717, and SLOCOG has projected an 8% increase in FY13-14 over FY12-13 levels. Once the FY13-14 targets are further refined, RTA will assume a proportional increase in overall LTF funding in our FY13-14 budget and a similar increase in the FY14-15 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.
- Staff will evaluate alternatives to address reserves during the next several months and present a draft Reserve Policy to the Board in FY13-14.
- 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 FY13-14.
- Runabout service hours and miles are expected to increase slightly to address 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 (both fiscal years) and North County Consolidated Services (FY14-15 only).
- 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 \$4.25 per gallon.
- 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 workers comp injuries has initiated a proactive program to address the number of claims and severity of the claims that we have had during the last year, and to hasten the return of employees back to work following lost-time work-related injuries.
- For FY13-14, the number of budgeted positions will slightly increase in comparison to FY12-13 to address deficiencies in data collection, operations oversight, and bus stop maintenance, as well as to address increasing Runabout demand. However should revenue projections in April indicate that FY13-14 revenue is down, there will be a requisite reduction in the number of FTE's based upon projected revenue.
- For FY14-15, the number of budgeted positions will increase as part of the North County Consolidated Services. 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 researching 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 10% annual increase for both PERS- and Blue Cross-covered employees 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 Collective Bargaining Agreement identifies 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.

**Proposed Budget Calendar**

- |             |   |
|-------------|---|
| February 13 | Detailed budget assumptions and revenue forecast to Executive Committee.          |
| March 6     | Obtain Board concurrence on proposed draft budget assumptions.                    |
| March 6     | Provide mid-year FY12 Budget data to Board with any recommended budget amendment. |
| March 31    | Based on feedback from Executive Committee draft FY13 Budget Draft complete.      |

- April 10 Draft FY13 Budget presentation to Executive Committee.
- April 17 Formal FY13 Budget presentation to RTAC.
- May 1 Final Board Budget presentation. Board adoption of FY13 Budget.
- Nov. 6 Present draft Reserve Policy to Board.

**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 13, 2013**

**STAFF REPORT**

**AGENDA ITEM:** B-3

**TOPIC:** Stipend for RTA Board & RTAC Members

**PRESENTED BY:** Geoff Straw

**STAFF RECOMMENDATION:** Support implementation for FY13-14

**RTAC RECOMMENDATION:** Support

**BACKGROUND/DISCUSSION:**

On April 7, 2007, the SLOCOG Board adopted a stipend program for its Board members who are city delegates attending SLOCOG meetings. County Board of Supervisor members were not included in the program, since they are already paid a salary as part of their elected position, and their offices are located at the primary SLOCOG Board meeting venue. Under SLOCOG's stipend program, all city delegates are paid \$100 for attendance at each SLOCOG Board meeting and an additional \$50 is paid to city delegates for each Executive Committee meeting attended. Those rates were developed following a review of 32 planning agencies in the state.

Staff understands that RTA Board members devote a lot of time studying issues presented to each member, and that the members incur ancillary costs that might not be reimbursed by their respective jurisdiction – particularly those members that must travel a significant number of miles to attend RTA meetings in San Luis Obispo. As such, staff is recommending that the RTA Board consider implementing a stipend policy that mirrors the SLOCOG stipend policy. In those cases where a joint RTA-SLOCOG Board meeting is conducted, RTA and SLOCOG would equally share in the stipend cost.

In addition, staff welcomes input from all community members on the services we provide. To encourage Board members and RTAC members to ride RTA services, staff is also proposing that all Board members, as well as RTAC members in good standing<sup>1</sup>, be provided unlimited access on RTA fixed-route services. In return, staff would seek continual feedback about RTA services from RTA Board members and RTAC members that ride our buses.

It should be noted that the stipend program would be processed through RTA's payroll system, and that the stipend would count as taxable income for each participating member. It should also be noted that the price of RTA Regional Passes is currently

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<sup>1</sup> As indicated in the RTAC By-Laws, RTA staff will notify the appointing agency within 30 days in the event of three consecutive absences by its representative. If an RTAC member misses three consecutive RTAC meetings, their unlimited access privileges would be revoked.

below the \$240 per month amount identified as a Section 132(f)(2)(A) Qualified Transportation Fringe Benefit. As such, this benefit can be provided without an impact to each participating Board and RTAC member's personal income.

# SAN LUIS OBISPO COUNCIL OF GOVERNMENTS

## STAFF REPORT

<b>MEETING DATE:</b>	April 4, 2007
<b>SUBJECT:</b>	SLOCOG Meeting Stipend

### SUMMARY

At the December SLOCOG Board meeting a discussion ensued regarding the potential for a stipend for the Board members who are city delegates attending SLOCOG meetings (Supervisors are paid a salary). The Board directed staff to return with information from other similar agencies regarding their respective practices relative to stipends.

The attached Table shows the results of our survey of other regional agencies in the state regarding their stipend policies. The information is for the Board to consider in their deliberation of the issue.

**RECOMMENDATION** *Support providing a STIPEND of \$100 per SLOCOG Board meeting and an additional \$50 per Executive Committee meeting.*

**Staff:** Review, discuss and provide direction for the budget and SLOCOG policy.

### DISCUSSION

See attached Table regarding various approaches taken by other Regional Transportation Planning Agencies, Councils of Governments, etc

Agency	Stipend status
Amador County Transportation Commission - (ACTC)	\$100/mtg
Association of Bay Area Governments - (ABAG)	\$100/mtg by Board.
Association of Monterey Bay Area Governments - (AMBAG)	\$50 mtg/- 10 mtg/yr - max \$500
San Benito County Council of Governments - (SBCOG)	\$100/mtg - 12 mtgs + special mtgs. No cap
Santa Cruz County Regional Transportation Commission - (SCCRTC)	\$50/mtg;\$50/committee mtg cap 100/mo
Transportation Agency for Monterey County - (TAMC)	none mileage reimb upon req only
Butte County Association of Governments - (BCAG)	none
Calaveras Council of Governments - (CCAG)	\$50/mtg - 10 mtgs a year
Contra Costa Transportation Authority - (CCTA)	\$100/mtg- (max \$400/mo)
El Dorado County Transportation Commission - (EDCTC)	none
Council of Fresno County Governments - (Fresno COG)	\$75/mtg-cog \$25/mtg-rural transit
Humoldt County Association of Governments - (HCAC)	none
Kern Council of Governments - (KCOG)	\$25/mtg (max 2/mo)
Kings County Association of Governments - (KCAG)	none
Madera County Transportation Commission - (MCTC)	none
Mendocino Council of Governments - (MCOG)	none
Merced County Association of Governments - (MCAC)	none
Orange County Transportation Authority - (OCTA)	\$100/mtg; 22 bd mtg/yr max \$500/mo-if 2 mtgs/day
Placer County Transportation Planning Agency - (PCTPA)	\$100/mtg (average 10/yr) with mileage reimb not to supervisors
Riverside County Transportation Commission - (RCTC)	\$100 mtg- cap \$400/mo 12 mtg/yr
Sacramento Area Council of Governments - (SACOG)	\$100/mtg (2 mtg a mo)-mileage if not reimb by jurisdiction
San Bernardino Associated Governments - (SANBAG)	\$100/mtg-12 mtg/mo \$100/mtg-can't get more than 1 reimb per day max \$400/mo
San Diego Association of Governments - (SANDAG)	\$150/mtg- 2 mtg/mo and 100/mtg com mtgs 2/mo chair - \$500/mo; 2 vice chairs - \$250/mo cap 6 mtg/mo
San Joaquin Council of Governments - (SJCOG)	none
San Luis Obispo Council of Governments - (SLOCOG)	none
Santa Barbara County Association of Governments - (SBCAG)	\$100/mtg & special mtgs 12 reg mtgs/yr
Shasta County Regional Transportation Planning Agency - (SCRTPA)	uses a plan.com (5 members) 75/mtg-mileage reimb to & from meetings no cap
Southern California Association of Governments (SCAG)	\$120-mo-+ mileage reimb (Caltran rate) cap 6 mtg/mo \$70/mo task force mtgs-(cannot receive both reimb in one day)
Stanislaus Council of Governments - (StanCOG)	none
Tulare County Association of Governments - (TCAG)	none
Ventura County Transportation Commission - (VCTC)	\$100/mtg cap 200/mo
Western Riverside Council of Governments - (WRCOG)	Exec Com (18 members) only mtg paid \$150/mo - 10 months
IRS ruling: stipends processed thru payroll (taxed)	



San Luis Obispo Regional Transit Authority

Executive Committee Meeting

Minutes 12/12/2012

C-1

Members Present: Fred Strong, President  
Adam Hill, Vice President

Members Absent: Bruce Gibson, Past President

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

Also Present: Eric Greening  
Ronald De Carli, SLOCOG  
Pete Rodgers, SLOCOG  
Aida Nicklin, SLOCOG  
Kate Chase

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

**President Fred Strong** called the meeting to order at 10:04 a.m. Silent Roll Call was taken and a quorum was present.

**2. Public Comments:**

**Mr. Eric Greening**, Atascadero, said he recently rode the southbound Route 9 departing Paso Robles at 8:15 a.m., and it was full of standees. He said this is getting to be a chronic issue, particularly when smaller buses are used as they have fewer seats. He thought there were 7 standing by the time the bus arrived at the Bordeaux apartments in South Atascadero, and 10-12 by Santa Margarita. **President Strong** asked if anyone was left behind. **Mr. Greening** said no. Passengers pack on the bus.

**President Strong** closed public comment.

### 3. Information Items

#### A. Information Items:

##### A-1 Executive Director's Report

**Mr. Geoff Straw** presented a “cheat sheet” outline of important items that will be discussed at the January Board meeting. Operations will present five performance standards for service quality and efficiency. This is the inaugural report and will be presented quarterly on an ongoing basis.

Staff received three minivans and one minibus earlier this month. Maintenance is working to get these ready for service. He said the engine failed in the bus leased from Livermore-Amador Valley Transit Authority (LAVTA). The Detroit Diesel engines are problematic in these 2003 models. It will cost about \$8,000 to rebuild it.

**Mr. Straw** discussed the Runabout ADA eligibility recertification, which staff will present to the Regional Transportation Advisory Committee (RTAC) in January and to the Board at a subsequent meeting. The Cambria Trolley had about 500 passengers on the December 6 Hospitality Night event. This was a record. The trolley carried 1,800 during the entire summer service.

The Joint Powers Authority (JPA) amendment was completed by the City of San Luis Obispo. It is on the Pismo Beach City Council agenda for December 18, San Luis Obispo County for January 8 and the rest are in process.

Staff is building a two-year operating and five-year capital budget plan and will incorporate this into what the Board will consider at the May meeting. This is something some jurisdictions have requested—particularly the City of San Luis Obispo. He briefly discussed the Board stipend implemented by the San Luis Obispo Council of Governments (SLOCOG). He talked about different options for Board and committee members, such as special passes or per-meeting stipends. The committee discussed whether or not the Board of Supervisors should be included with the city representatives in the compensation structure.

**Mr. Straw** said staff continues to work with the landlord regarding facilities needs, as well as the County Real Estate Services to help appraise the current location and develop some pricing options for extending the lease.

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

**President Strong** opened public comment.

**Mr. Greening** asked if the January meeting on the North County Transit Plan was going to be public. **President Strong** said these are briefing meetings so that he and his staff in Paso Robles are on the same page.

**President Strong** closed public comment.

A-2 Executive Director's annual performance evaluation

**Mr. Timothy McNulty**, County Council, announced there will be a closed session agenda item at the January Board meeting to discuss the Executive Director's annual reviews. Evaluation forms were sent to all members of the Board as well as Geoff's staff and they are already starting to come back. The data will be compiled and presented in closed session.

**President Strong** opened public comment.

**President Strong** closed public comment.

**4. Action Items**

B-1 RTA Passenger Code of Conduct Policy

**Mr. Straw** reviewed the passenger policy, which is similar to that of SLO Transit and addresses behavior issues on the buses. Major infractions occasionally occur and staff does not currently have anything in place to deny service beyond the day the behavior occurred. Staff will give violators a chance to appeal adverse decisions. He said there are a handful of passengers who are repeat offenders. Presently, all we can do is use the penal code to go after offenders.

The committee discussed the process for handling violators and the appeals process.

**President Strong** opened public comment.

**Mr. Greening** agreed drivers should be protected from dangerous behavior and wished area bars could do something besides tell people to take a bus. He pointed to number 10, "using transit properties for the purpose of sleeping." He said one of the benefits of taking transit is the opportunity to get some extra rest. He asked for clarification and stressed concerns about selective enforcement if someone happens to fall asleep. He pointed to some disability concerns, such as narcolepsy. He also inquired about the "odors" issues and asked about the threshold of what is considered "bothersome". He thought there may be some push-back at the public hearings. **Mr. Ron DeCarli**, SLOCOG, gave an example of one rider who consistently spreads out, taking two seats, which doesn't allow for someone to sit down while there are standees. **Mr. Straw** said it is nice for commuters to be able to nap

while travelling, and they can easily do so by setting their watch or phone alarm. He was more concerned about capacity issues. This gives the drivers some leverage to inform a rider of inappropriate behavior. **Mr. Greening** agreed, saying the main point is “failure to yield an available seat” when needed. **President Strong** interjected there should be a limitation of no more than one bus trip. **Mr. Pete Rodgers**, SLOCOG, inquired about the urgency of approving this passenger code of conduct. He suggested we tentatively adopt it and then run it through RTAC in January. If the policy needs to be fine-tuned, those changes could be brought back to the Board.

Further discussion ensued about what is considered a noxious odor and how it is determined to be excessive. **Vice President Hill** used the library as an example of how communities pass odor restrictions. **President Strong** expressed concern about service animal odors. He then suggested creating a personnel policy manual that perhaps could be accessed by the public and showed this odor policy was being acted upon judiciously.

**President Strong** closed public comment.

**Vice President Hill** moved to approve the Action Agenda. **President Strong** seconded, and the motion carried on a voice vote.

**5. Consent Agenda Items**

C-1 RTAC Meeting Minutes of April 18, 2012

C-2 Executive Committee Meeting Minutes of 10/17/12

**Vice President Hill** moved to approve the Consent Agenda. **President Strong** seconded, and the motion carried on a voice vote.

**6. Agenda Review:**

**Mr. Straw** said he would like bring back the meeting stipend for local jurisdictions with the next fiscal year budget review.

**President Strong** said he would like to have the RTA/SLOCOG joint agenda sent out as one document instead of two. The committee discussed how this could most effectively be done.

7. **Closed Session Items:**

D-1 NONE

8. **Adjournment:** **President Strong** adjourned the meeting at 10:49 a.m.

Respectfully Submitted,

Acknowledged by,

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Anna Mafort-Lacy  
Administrative Assistant

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Fred Strong  
RTA President