CITY OF
OXNARD
CALIFORNIA

Meeting Date: 07/10/12

ACTION	TYPE OF ITEM
☐ Approved Recommendation	☐ Info/Consent
☐ Ord. No(s). _____	☐ Report
☐ Res. No(s). _____	☐ Public Hearing (Info/consent)
☐ Other _____	■ Other Council Business

Prepared By: Martin R. Erickson MRE Agenda Item No. N-1

Reviewed By: City Manager MMK City Attorney AA Finance JC Other *(Specify)*

DATE: June 13, 2012

TO: City Council

FROM: Martin R. Erickson, Special Assistant to the City Manager
City Manager's Office

SUBJECT: **Consideration of Support for the Ventura County Transportation Commission (VCTC's) Adopted Position on Countywide Transit.**

RECOMMENDATION

That City Council consider supporting the adopted position of VCTC concerning countywide transit and provide direction to City Manager.

DISCUSSION

In January 2010, SB 716 (Wolk) went into effect. One of SB 716's provisions for Ventura County dictated that by July 1 2014, all Transportation Development Act (TDA) funding would need to be expended on transit. VCTC was encouraged to prepare a countywide transit plan in 2012 to prepare for this. VCTC prepared a regional transit study in cooperation with Ventura County's cities and the County which was adopted by VCTC on April 13, 2012. A key component of the plan was that Gold Coast Transit (GCT) would transition into a west county transit district. Another element of the transit study was to allow flexibility for all cities and the County to use TDA funds for streets and roads purposes if all transit needs were met.

From Oxnard City staff's vantage point, although the City has expended all of its TDA funding on transit purposes for the past two years, maintaining flexibility of TDA funds for Article 8 (streets and roads) would be a desirable outcome. VCTC is requesting that each member City of VCTC and the County formally support VCTC's adopted regional transit study.

FINANCIAL IMPACT

There is no financial impact at this time.

Attachment #1 – Ventura County Regional Transit Study – Final Report

TRANSFORMING TRANSPORTATION IN VENTURA COUNTY

Ventura County Regional Transit Study

FINAL REPORT

Prepared for:
Ventura County Transportation Commission

Prepared by:
MIG, Inc.
Wendel
Patti Post & Associates

April 9, 2012

ATTACHMENT 1
PAGE 1 OF 44

Table of Contents

I. Executive Summary 2
II. Introduction 9
III. Overview of the Study Process 11
IV. Current State of Transit in Ventura County 17
V. Organizational Options 21
VI. Consideration of Alternatives 28
VII. Policy Considerations 30
VIII. Operators Proposal 34
IX. Commission Direction and Recommendations 36
X. Considerations for Moving Forward 36
XI. Conclusions and Next Steps 43
Appendices A-1

ATTACHMENT 1
PAGE 2 OF 44

I. Executive Summary

Introduction

This report presents the findings and outcomes of a nearly two-year study of options for organizing public transportation services for Ventura County and the direction and actions adopted by the Ventura County Transportation Commission pursuant to it. The direction for the study came from two sources: A 2009 Commission workshop on the future of VCTC's own VISTA service and legislative provisions arising out of SB 716, which went into effect January 1, 2010. SB 716 generally requires that Transportation Development Act funds be spent for public transit purposes, but in a section specific to Ventura County states that:

> The Ventura County Transportation Commission may submit to the Senate Committee on Transportation and Housing and the Assembly Committee on Transportation a report analyzing options for organizing public mass transportation services in the county, for the expenditure of revenues deposited in the local transportation fund, and a recommended legislative proposal for implementing the plan by December 31, 2011. If the legislative proposal is not enacted by the end of the 2011-12 Regular Session of the Legislature, revenues deposited in the local transportation fund in that county shall be available for the fiscal year beginning on July 1, 2014, and each fiscal year thereafter, solely for claims for Article 4 (commencing with Section 99260) and Article 4.5 (commencing with Section 99275) purposes.

The study has involved data collection, analysis of options by a Steering Committee and engagement of the community, the operators, and city and county management. The process culminated in an unprecedented level of consensus among the operators on the desirable path forward in creating a more coordinated, customer-focused system of services in Ventura County. A proposal was developed by transit operators in the County, which ultimately resulted in adoption of a recommendation by the Commission to be forwarded to the Legislature. Details on the analysis, process and recommendations are presented in the report.

Commission Recommendation in Report to the Legislature

As an outcome to this study, the Commission adopted a consensus position reached by the Regional Transit Study Steering Committee, the Transit Managers and the City Managers. The proposal is an innovative combination of the cooperation and consolidation approaches discussed in this report that is uniquely tailored to Ventura County's conditions and needs, and that allows for further development and change over time as results and conditions warrant:

ATTACHMENT 1
PAGE 3 OF 44

1. Support creation of a Gold Coast Transit District (GCTD) to assume the responsibilities for West County public transportation services. Cities and communities in West County (including Heritage Valley) would be provided with the opportunity to join the District.

2. Transition authority for VISTA services in West County to the new District, with services in the Heritage Valley subject to negotiation and participation by those communities and California State University Channel Islands (CSUCI) and Santa Barbara County Association of Governments (for Coastal Express) pending continued funding agreements with those entities.

3. Support creation of a Memorandum of Understanding (MOU) in East County between the cities of Camarillo, Moorpark, Simi Valley and Thousand Oaks and the County of Ventura for unincorporated East County, to further coordination of individual services.

4. Transition authority for VISTA East service to the East County MOU.

5. Support legislation to allow the use of TDA funds for Article 8 purposes, including streets and roads, and continued return to source of Local Transit Funds.

6. Use VCTC discretionary transit funds to deliver sustainable levels of transit service.

7. Support the objective of further consolidation over time as needed to improve connectivity and customer service.

Study Background and Process

The study began in April, 2010 with appointment of a Commission Steering Committee from the Commission membership, representing the diverse geography and interests of Ventura County. This Steering Committee met six times over the course of the study, providing policy guidance and a forum for deliberation on issues and alternatives. Each of the ten agencies providing public transportation was interviewed in-depth and operator profiles were prepared. Meetings were held with the technical committee of the operators (TRANSCOM), the City Managers and the public. The public meetings were conducted in conjunction with VCTC's Comprehensive Transportation Plan and involved subregional advisory groups and a regional advisory group.

ATTACHMENT 1
PAGE 4 OF 44

Guiding Principles

The Commission adopted the following Guiding Principles for the study:

Develop a network of sustainable services that meet the diverse needs of the customers through the following actions:

1. Foster open dialogue among communities, system users, operators and agencies
2. Transition to a user-focused system that goes beyond individual operator boundaries
3. Gain consensus on the approach from elected officials and city management
4. Incorporate applicable Federal, State, regional and local livability, sustainability and greenhouse gas reduction goals

Current State of Transit in Ventura County

Public transportation in Ventura County is provided by ten different agencies through a combination of fixed route and demand-responsive services. These operations range in size from the multi-jurisdictional Gold Coast Transit Joint Powers Authority to the Ojai Trolley. VCTC operates VISTA, which consists of basic interjurisdictional connector routes and a dial-a-ride serving Heritage Valley (mainly the communities of Santa Paula, Fillmore and Piru). Based on local funding policies and perception of transit needs, operators offer different days and hours of service. This makes connections difficult and service confusing, especially for the infrequent or new rider. While VCTC and the operators have attempted to improve connections through coordinated fare media and scheduling software, progress toward truly integrated service has been minimal.

Costs also vary widely – for example according to data from the 2009 National Transit Database (NTD), utilized for illustrative purposes early in the report process, cost per passenger trip for the four largest operations ranges from $3.66 to $7.70 for fixed route service and from $5.55 to $46.39 for demand-response service. There are many reasons for this range in costs – for example type of area served, level of service provided, type of vehicle operated and variance in labor costs, including contract or in-house service and administrative overhead. Also, agencies can use different reporting methods and some transit costs are not included.

ATTACHMENT 1
PAGE 5 OF 44

Views of the Current Situation

Interviews of key stakeholders (including all of the Transportation Commissioners) revealed some common views:

- Many of the obstacles to transit service are inherent to Ventura County's characteristics – widely spaced, diverse communities and centers where geographic areas do not share common economic, social and transportation service values.
- Current transportation services are good given the amount of local resources that are available and individual cities are doing a good job of balancing resources.
- There is no one preferred organizational structure for transit service provision – views range from a single entity to the current system of smaller, customized providers
- There is extensive support for quality transit services

Organizational Options Considered

The Steering Committee and the Commission considered four potential models for structuring public transit service in Ventura County:

Collaboration – informal agreements to modify or change the status quo. For example, agreements for an "800" or "511" information number, regionwide marketing, or transfers. Over the years, VCTC has managed a number of these agreements, including a coordinated farecard, paratransit scheduling software and NextBus information program.

Coordination – formal agreements that modify ways of doing business. This could include a countywide ADA paratransit service, agreements to share funding responsibility (such as the current agreement between various parties and VCTC to VISTA service on the 101 corridor), a Joint Powers Authority to govern more formal service coordination, joint procurement or public information and marketing.

Consolidation – a formal combination or blending of services under a single or multiple entities. There are two types of Consolidation – Full or Moderate.

> ***Full Consolidation*** – a single agency provides all policy, funding, planning and operations.

Moderate Consolidation - a central entity provides policy, planning and funding and one or two operating entities provide the service.

Policy Direction on Options

Mid-point in the study, the Steering Committee determined, with concurrence of the Commission, that Commission staff and the consultant team should move forward with analysis and city consultation on the Full Consolidation option (with strong continued local influence) and a hybrid version of Moderate Consolidation with two operating entities. Under this type of arrangement, the entities could be a combination of a District, a Joint Powers Authority or other alternative. Key principles moving forward were:

- Keep communities whole – having at least the level of service that communities have now
- Increase connectivity
- Improve local service
- Maintain a level of local influence and control

Evolution of the Organizational Concept

During consultation with the operators and City Management, several expressed concern that the Coordination option had been abandoned prematurely and requested that it be re-inserted for further consideration. In meeting with the Steering Committee, the operators and management were offered the option of presenting their own alternative. VCTC informed State Senate Transportation Committee staff that the report would be submitted after December 31, 2011 so that an organizational option could be worked out that the Commission and the communities could come to consensus.

The operators developed an initial proposal that featured:

- Creating a Gold Coast Transit District (GCTD) to provide a framework for consolidated service in West County. Communities, including Heritage Valley, would be provided with the opportunity to join the District.
- Provide for member agency TDA to be subvented to GCTD as of July 1, 2014, net of funding for transit stations, stops and facilities. TDA would be returned to

ATTACHMENT 1
PAGE 7 OF 44

individual jurisdictions in East County and cities would be allowed to file for Article 8 purposes (for streets and roads) if there were no unmet transit needs.

- Transition authority for VISTA services in West County to the new District, with services in the Heritage Valley subject to negotiation and participation by those communities and California State University Channel Islands (CSUCI) and Santa Barbara County Association of Governments (for Coastal Express) pending continued funding agreements with those entities.
- Consolidate ADA service into no more than two areas.
- Create an East County MOU to govern further coordination of service, transfers and fares among East County operators.

They also articulated Guiding Principles that stated the right of local agencies to determine how to provide services, concern with equity of TDA requirements, the importance of continued local control of state and federal funds, and the desirability of consolidation of local ADA and dial-a-ride operations.

Steering Committee and Commission Direction

The Steering Committee considered the operators proposal and recommended:

- Include Customer Focus as a top priority in any Guiding Principles
- Express consensus support for the operators' structural proposal
- Further consolidation would be pursued at a future undetermined date
- The operators' proposal for use of TDA for Article 8 purposes in East County remained an open issue

March 2, 2012 Commission Action

On March 2 the Commission took action to *"Support the Operators proposal in concept with the understanding that all cities would have flexible use of TDA funds and further discussion of Heritage Valley Service would take place before a proposal is brought back to VCTC on April 13th with the specifics fleshed out and with the recognition that the concept of full consolidation will continue to be discussed as a long term goal. Staff was directed to work with City Managers to flesh out specifics."*

Future Steps

ATTACHMENT 1
PAGE 8 OF 44

VCTC and the operators, working with the consultant team, have identified a number of issues to be considered in successful implementation of this new organizational model. These include logistics for transition of VISTA service, including outside funding arrangements from CSUCI and SBCAG; VCTC roles and responsibilities; framework for further consolidation of ADA and dial-a-ride services; creation and constitution of GCTD; terms and timing of the East County MOU and arrangements for use of VCTC discretionary funds to meet the objective of "keeping communities whole" from a service perspective. The intent is to submit this report to the Legislature and continue proceeding in the preferred direction for reorganizing and improving the delivery of public transportation in Ventura County.

ATTACHMENT 1
PAGE 9 OF 44

II. Introduction

Origin of the Study

For the past several years many policymakers and customers have recognized that the way that public transportation is provided in Ventura County needs to be reconsidered. Impetus for change came from at least the following: VCTC's consensus that the funding, organizational and governance of its own VISTA service required simplification and consolidation; California Senate Bill (SB) 716, affecting the use of Transportation Development Act funds; trends in state and federal transportation funding; awareness of the benefits of organizational structures and practices employed elsewhere; and input from policy leaders and the public in a variety of forums and surveys of Ventura County residents and business, including the concurrent development of the Comprehensive Transportation Plan and during virtually every annual Unmet Transit Needs process.

In recent years, VCTC, in working with Ventura County's multiple operators, has made a number of attempts at further coordinating and rationalizing service delivery in the county. VCTC operates VISTA service, a contractually-provided "baseline" that serves as a fixed-route connection between jurisdictions. VCTC has also explored "virtual consolidation" of fares and transfers through a smart card and the Trapeze scheduling system that allows agencies to share and monitor interagency trip data. However, these efforts have served more to improve local service operations than to further connect individual services.

In early 2010 the Ventura County Transportation Commission (VCTC) embarked on a Regional Transit Study for the county. The intent was to define a direction for improving the quality, efficiency and overall sustainability of public transportation in Ventura County and to provide a platform for presenting an organizational proposal to the State Legislature. VCTC enlisted the services of a consultant team to work with Commissioners and staff in reviewing the state of the system, identifying potential options and charting an initial path forward. The results of this analysis would form the basis of a report to the Legislature and also pave the way for a more effective, comprehensible and sustainable public transportation system for Ventura County.

SB 716

SB 716, enacted in 2009, requires that all state Transportation Development Act (TDA) funds committed to transit uses beginning on January 1, 2010. However, Ventura

ATTACHMENT 1
PAGE 10 OF 44

County and other counties, were given an extension to July 1, 2014. The bill allowed VCTC to propose a plan to the Legislature for utilization of TDA funds and organizing public mass transportation services in the county.

TDA funds are currently allocated on the basis of population to the cities and unincorporated area of the County. The amount of TDA funds allocated to the cities and County in 2011 was amended up a final number of approximately $26 million. Amounts allocated to local jurisdictions ranged from about $235,000 in Ojai to almost $6,250,000 in Oxnard. This is down from a high of almost $30 million several years ago. In accordance with SB 716, until July 1, 2014 TDA funds in Ventura County can be spent for other transportation purposes, if no outstanding needs for public transportation that were "reasonable to be met" were identified through the Unmet Transit Needs or "Article 8" process. SB 716 does not change the way the TDA funds are allocated.

When the statute goes into effect on July 1, 2014, this option would be eliminated along with the ability of local jurisdictions to substitute local funds for TDA and use TDA for funding streets and roads (and technically complying with the required farebox recover requirement). According to this statute, after a few prescribed regional uses, all TDA funds must be allocated to transit, and adherence to all TDA rules and regulations will be required. Assuming there are no further amendments to the statute, many of the current, longstanding practices and processes will need to change. The status quo will be difficult to maintain from either financial or regulatory compliance perspectives. For example, individual city operations will be required to meet fare recovery requirements (20% in urban areas, 10% in rural areas).

To provide a basic analysis of the impact of SB 716 on transportation spending a review of available data was conducted. VCTC staff estimates indicate that if SB 716 were to have been in effect today, using 2010-11 data (the latest full year of available data), slightly over $3,000,000 out of a total TDA allocation of $20,884,000 would be shifted from streets and roads to public transit use. However, SB 716 does not change the TDA allocation process.

Under the provisions of SB 716, when the statute goes into effect on July 1, 2014, it may also eliminate the practice of some local jurisdictions to substitute local funding in order to allow compliance with the farebox recovery requirement.

The bill also provided Ventura County with an opportunity to propose alternative organizational approaches to improve Ventura County public transit and explore creation of a more consistent region-wide system that provides a family of services to better meet the County's overall mobility needs. Changes resulting from this response

ATTACHMENT 1
PAGE 11 OF 44

to SB 716 could lead to establishing a countywide transit program that also better meets the needs of customers through consistent policies and programs, addressing the increasing demand for public transportation that will occur over time. In conjunction with making these improvements will be the need to insure continued recognition of the contributions and priorities of all of the local communities served by transit.

With an understanding of this background, the Commission embarked on a process to develop a consensus report on future operation and provision of public transportation services in the County.

Study Guiding Principles

Initiating the study in May of 2010, the Commission adopted a set of Guiding Principles:

Develop a network of sustainable services that meet the diverse needs of the customers through the following actions:

1. Foster open dialogue among communities, system users, operators and agencies
2. Transition to a user-focused system that goes beyond individual operator boundaries
3. Gain consensus on the approach from elected officials and city management
4. Incorporate applicable Federal, State, regional and local livability, sustainability and greenhouse gas reduction goals

III. Overview of the Study Process

Steering Committee

To guide the study from a policy perspective, on April 9, 2010, the Commission appointed a Steering Committee. Commissioners named to this Steering Committee represented the diverse geography and interests in Ventura County, including:

- East and West County
- Rural areas of Heritage Valley and Ojai

ATTACHMENT 1
PAGE 12 OF 44

- Smaller and larger cities
- Commissioners also sitting on the Gold Coast Board of Directors

The Steering Committee met a total of six times over the course of a roughly 18-month period and achieved the following milestones:

August 26, 2010: Confirmed Study outcomes and expectations and developed a framework for a Ventura County transit vision

December 9, 2010: Considered basic criteria to guide selection of the organizational alternatives. These included: Affordability and funding; implementability; connectivity and coordination; service quality and efficiency and effectiveness

March 9, 2011: Reviewed potential organizational models and narrowed the focus to four key directions thought to be most appropriate to Ventura County and refined evaluation criteria. These criteria included: keeping communities whole from a funding and service perspective; increased connectivity; improvement of local service and maintenance of a level of local influence and control.

May 6, 2011: Presented report to the full Commission on alternative for further exploration – Full Consolidation and a "Hybrid" approach of Moderate Consolidation with one or two operating entities. The Commission directed staff to work with the consultants on further analysis and to do community, city and operator consultations based on these potential models.

August 4, 2011: Received a report from staff and consultants on results of community and advisory consultations, policy issues raised by cities and operators. At the request of the City Managers, agreed to re-insert the Coordination Alternative for further consideration and to have a joint meeting between the City Managers and the Steering Committee.

December, 2011: Met with management representatives of the operators and provided the opportunity for the operators to present an alternative proposal for meeting the objectives identified by the Commission.

January, 2012: Met with management representatives of the operators and provided consensus endorsement for the organizational structure presented by the operators.

Key Stakeholder Interviews

To begin the study, the consultant team interviewed each of the Commissioners, representing each of the ten cities in Ventura County, the five County Supervisors and two citizen representatives. While interviewees expressed a wide variety of opinions, a few key themes emerged from the interviews.

Many of the obstacles to transit service are inherent to Ventura County's characteristics
Some of the major obstacles to providing more extensive service are intertwined with the County's dedication to slow growth, open space, medium- and small-size, well-separated cities and communities, a thriving agriculture industry, and a high quality of life, which its people appear to want to retain. Widely separated population, employment, educational, commercial and cultural centers are difficult to serve with public transit. Some street patterns are also difficult to serve with transit. These geographically separated communities often do not share common economic, development, social and, especially, transportation values and needs. Geographically separated regions (e.g. East County, coastal West County, and the Ojai and Heritage Valleys) may not believe they have enough in common to share a vision and a policy and operating structure for transit services.

Current transit service is good, but not great
This view reflects the problems in providing and funding extensive transit services in a difficult environment but there is also the widespread belief that agencies are trying hard to provide a good quality of service with the resources that they have.

There is a wide variety of opinion on organizing and improving transit service
There is no one preferred organizational structure for transit policy, management or service and a wide variety of options were suggested.

There is extensive support for quality transit service
Most believe that quality transit service in Ventura County is essential, has value beyond its direct utility to users, and should be maintained and if possible expanded. Most also believe that enhanced transit can help achieve other regional and community economic, social and environmental goals.

Operator Interaction

This interaction included initial individual meeting with each operator, briefings and discussions at TRANSCOM meetings and the development of an operator proposal, which will be discussed later in this report.

ATTACHMENT 1
PAGE 14 OF 44

In order to obtain a better understanding of the transit operations provided within Ventura County as well as the people and agencies providing those services, the consultant team conducted a series of meetings with the local transit operators. Unlike the stakeholder interviews with VCTC Board members and other decision makers within Ventura County, which included policy related issues, these were focused more on operations and local jurisdiction issues.

The interviews began with the reinforcement that this study was not an operational review, but rather a way to increase our knowledge of services and offer interviewees the opportunity to communicate issues and ideas in confidence. Each interview contained the following broad topic areas:

- Agency history and background
- General summary of services provided
- Key service related issues
- Organizational, management, financial information
- Other current challenges or ideas
- Vision for future from both a jurisdictional and an overall county

Main points from these interviews were:

SB 716 is expected to have varied impacts
Impacts of SB 716, if unchanged, which would require all jurisdictions within Ventura County to spend their entire allocations of Transportation Development Act funds for transit purposes effective July 1, 2014, will vary from operator to operator. TRANSCOM members recommended discussing those impacts with their supervisors or other management representatives to get their input and any recommendations regarding potential financial impacts.

Service policies and arrangements can be simplified
There is an opportunity to untangle all the "hand shake" and inconsistent operating/funding agreements into a consistent set of policies. These included the variety of VISTA agreements as well as the existing ADA paratransit coordination procedures and agreements.

Communication with customers can be improved
Interviewees saw potential for more consistent communication, coordination, and understanding of various transit services offered in the county. There was recognition

that it would be difficult for potential or new transit users to be able to understand the services in the county, especially the demand responsive services.

Existing services have local support
There typically is strong local commitment to local services and understanding that the decision makers within the jurisdictions valued the presence of local services, especially for seniors and persons with disabilities. It was noted that many services had remained relatively constant over time and that few complaints or requests for change were received by technical staff or decision makers.

Demand for coordinated interjurisdictional services will increase
There is an understanding that there will logically be an increasing demand for more inter-jurisdictional services, including more senior connections in conjunction with more consistent ADA paratransit coordination as discussed above. There were thoughts that increased senior services to offer inter-jurisdictional trips would be well-received, but also would require additional, perhaps significant, resources.

Opinions on optimal structure for transit in Ventura County vary widely
There were varying perspectives regarding consideration of organizational options, including combined services and a single county agency. Although TRANSCOM members in general agreed that more inter-jurisdictional services would be beneficial to the customers, there was no perceived easy answer regarding the infrastructure to deliver those services. It was noted that services and structures in the western portion of the county were significantly different than those in the eastern portion. For example, the west has one primary operator while the east has several. In addition, there were some differences in opinion on whether Camarillo was more similar to eastern than western portions of the County.

VCTC performs a valuable service but there is not common agreement on the agency's role in public transportation
Similarly, there were also varying perspectives on the issue of whether there was a conflict of interest with the VCTC role as both funder and operator. Most agreed that VCTC provided valuable information and services to them regarding financial and policy issues, but some believed that inter-operator issues were not discussed sufficiently as part of the TRANSCOM process.

Public transit has a role but a common approach may be difficult to achieve
From a broader view perspective, there were thoughts that the diversity and variety of jurisdictions in the county may require different types of services, thus common goals may be difficult to develop. Many believed that jurisdictions tended to be independent and that transit, per se, was not a common issue of concern within the county. There

ATTACHMENT 1
PAGE 16 OF 44

was recognition that transit had long term potential for improved inter-jurisdictional access, and better mobility options for the senior population. Further, public transportation could play a role in areas such as congestion relief, environmental quality and economic development.

The findings from these meetings were included in a report to the Steering Committee.

TRANSCOM Meetings

TRANSCOM, a VCTC advisory committee comprised of technical representatives of the cities operating transit and the Gold Coast Transit JPA were included in the study from an advisory perspective. In addition to meetings with the consultants, TRANSCOM members were engaged with their management representatives in review of materials and consideration of alternatives. VCTC staff also conducted periodic briefings of TRANSCOM on the progress of the study.

City Manager Briefings

The VCTC Executive Director met monthly throughout the study process with the county's ten City Managers, updating them on the study's progress and holding individual meetings on request. The City Managers were also actively engaged, along with transit agency management staff as the study entered into the recommendations phase. More specific and focused meetings and discussions were conducted later in the process.

Public Engagement and the Comprehensive Transportation Plan

Public engagement was multi-pronged and predominantly conducted in conjunction with public engagement for development of the parallel and complementary multimodal Comprehensive Transportation Plan. In an unprecedented level of outreach, VCTC has developed Ventura County's first comprehensive, multi-modal plan. Through this process, the Executive Director and staff met with over 40 organizations and groups. In addition, four Local Advisory Groups were established along with a Stakeholder Advisory Committee. These groups represented a cross-section of business (including agricultural), community, agency and interest groups. The Executive Director and staff also participated in a workshop hosted by CAUSE, a key stakeholder group involved in public transportation and social equity. A survey was conducted of transit riders and businesses in order to better understand their specific needs.

Through this outreach and engagement, the community articulated a vision of a better-connected and integrated transportation system. The prevailing view was that transit is

ATTACHMENT 1
PAGE 17 OF 44

currently an afterthought, that the system needs to be integrated and that there are many underserved sectors. Specifically, they called for a system of public transportation that provided for seamless transportation among modes, minimizing transfers among systems and addressing the long wait times and inconsistent service hours and levels of service. Informational pieces on the Comprehensive Transportation Plan and the Regional Transit Study developed from these consultations is included in Appendix I.

IV. Current State of Transit in Ventura County

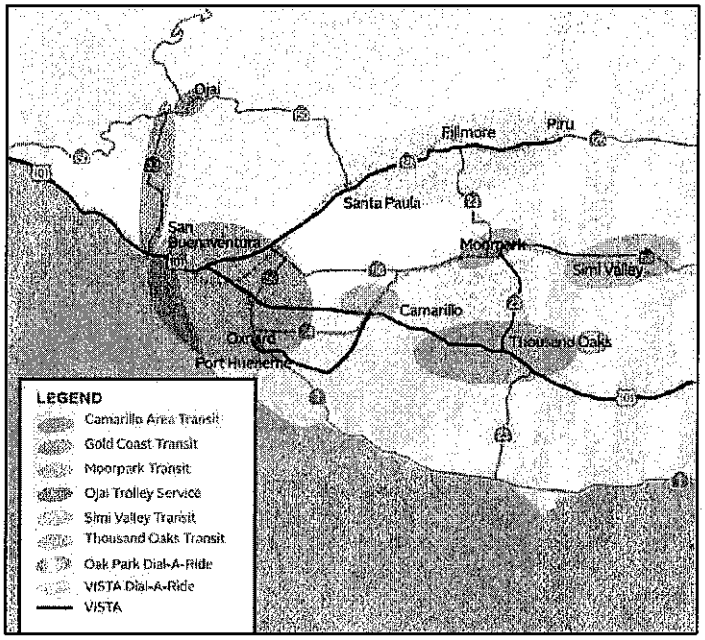
At present, public transportation in Ventura County is provided by a variety of operators. Specifically, ten different agencies provide a combination of fixed route services and/or some form of demand response service, also known as dial-a-ride. Arguably, at present, public transit in Ventura County is not a system, but more resembles a series of stand-alone operations. The operations provide disparate levels of service that the public has indicated are not easily understood or accessed, including whether the services are interconnected.

Seven operators provide fixed route services in Ventura County: Gold Coast Transit (GCT), VISTA, City of Simi Valley, City of Thousand Oaks, City of Moorpark, City of Camarillo and City of Ojai. Additional transit services within the county include services provided by the County of Ventura, the City of Oxnard (as lead agency for the Harbors and Beaches service) and the Camarillo Health Care District (which is partially funded by VCTC for longer distance trips). Additional information regarding the various operators is presented in Appendix II.

The types of services vary considerably in terms of scale, scope, and cost. For example, the number of GCT vehicles deployed to provide fixed route services is roughly the same as the total fixed route fleet for the rest of the operators combined. In addition, almost all of the operators provide some form of demand response services for seniors and sometimes the general public. These operations also include those services required under the Americans with Disabilities Act (ADA) for persons with disabilities who cannot use fixed route services.

ATTACHMENT 1
PAGE 18 OF 44

Fixed Route Transit Services



All operators offer different days and hours of service, based on localized policy decisions that could include financial, service area and other factors. Again, from a customer perspective, if transferring is required, then the varying days and hours can impact the accessibility and understanding of the transit network. Further, many services operate on different headways, or intervals between trips. These difficulties in inter-operator connections have been addressed somewhat in the area of ADA paratransit, where designated transfer points have been created. However, there are some current arrangements that can potentially cause confusion -- for example where one agency provides the outbound trip and another provides the return trip. To add further complexity, this arrangement can vary between operators and service areas.

In addition, many services are provided with varying days and hours of operation with a number of jurisdictions operating on Saturday, but fewer operating on Sunday. These differences in schedules also make it difficult to plan a multi-operator trip and to attract more new riders to the system. That is not to say that all transit agencies need to operate on precisely the same schedule but it does suggest that some consistency of service delivery in terms of days and hours of operation would make the service easier for customers to understand and use.

Based on a number of local and regional policy decisions, both administrative and direct operating costs associated with these services also varies considerably

depending on priorities, staffing, or whether services are operated by public employees or private contractors. In addition, due to the variances in size and type of operation, the methodologies for how these numbers are reported also vary.

Within the multiple operator arrangement that currently exists, there is a wide range of costs. Because there have been many factors and ways of accounting, the Federal government has established a single database (the National Transit Database, or NTD) that has been used for decades to compare transit data including costs across operators. However, not all Ventura County operators are required to report data to the NTD, due to size of operations and other factors. However, in order to illustrate the range in size of operation and costs, the 2009 NTD as reported by Gold Coast Transit, VISTA, City of Simi Valley and City of Thousand Oaks are included below (see Appendix III for additional operating cost data and further explanation of NTD).

ATTACHMENT 1
PAGE 20 OF 44

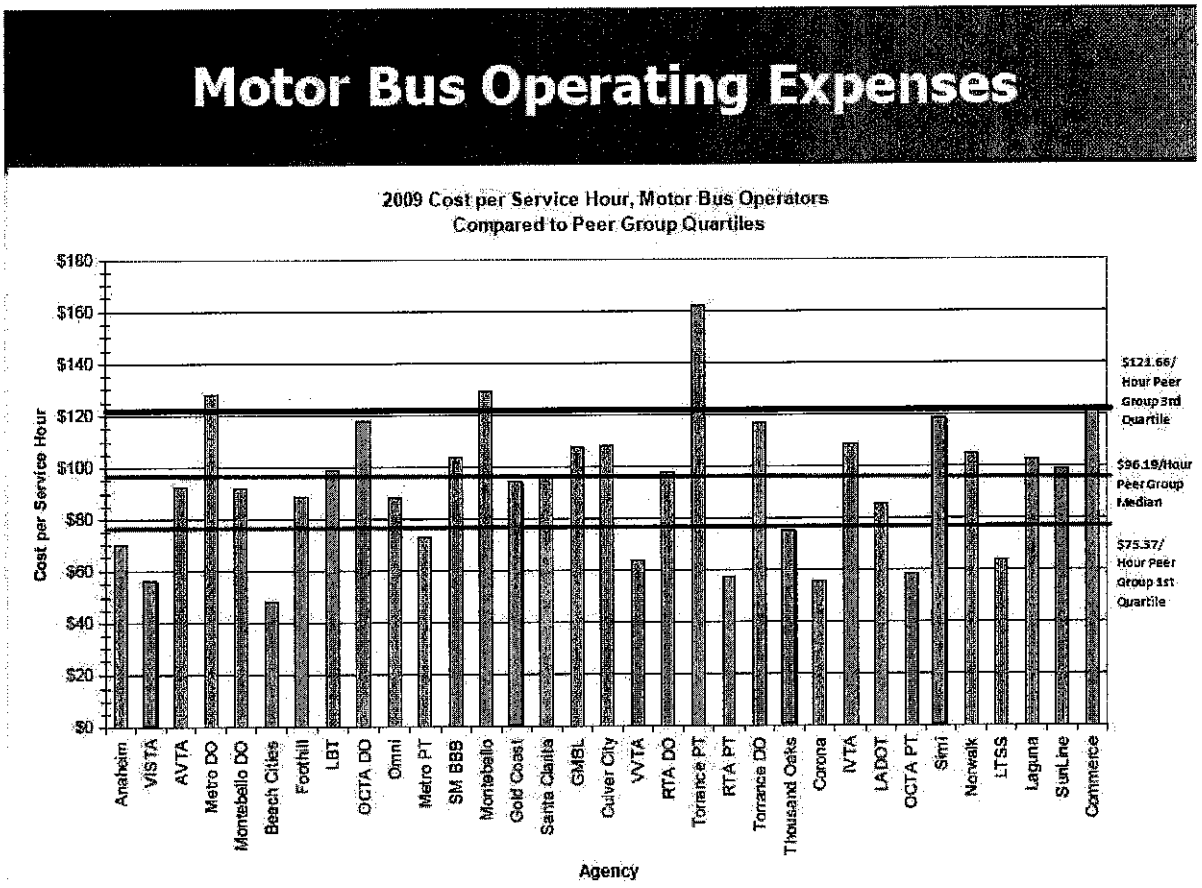
2009 NTD Data

	Gold Coast Transit	VISTA	City of Simi Valley	City of Thousand Oaks
FIXED ROUTE				
Number of Vehicles	39	25	8	6
Total Unlinked Trips	3,568,028	785,806	477,032	185,681
Annual Vehicle Rev. Miles	1,732,855	1,404,594	475,944	195,023
Annual Vehicle Rev. Hours	140,077	50,701	31,143	12,668
Operating Expenses	$13,071,044	$2,831,051	$3,672,794	$945,836
Unlinked Pass. Trips/Vehicle Rev. Mile	2.1	0.6	1.0	1.0
Unlinked Pass. Trips/Vehicle Rev. Hour	25.5	15.5	15.3	14.7
Operating Expense/Unlinked Pass. Trip	$3.66	$3.60	$7.70	$5.09
Operating Expense/Vehicle Rev. Mile	$1.13	$2.02	$7.72	$4.85
Operating Expense/Vehicle Rev. Hour	$93.31	$55.84	$117.93	$74.66
DEMAND RESPONSE				
Number of Vehicles	19	13	12	12
Total Unlinked Trips	82,655	206,051	48,141	71,664
Annual Vehicle Rev. Miles	494,424	337,171	218,421	473,019
Annual Vehicle Rev. Hours	38,192	29,670	17,974	33,704
Operating Expenses	$2,483,714	$1,143,865	$2,233,037	$1,430,194
Unlinked Pass. Trips/Vehicle Rev. Mile	0.2	0.6	0.2	0.2
Unlinked Pass. Trips/Vehicle Rev. Hour	2.2	6.9	2.7	2.1
Operating Expense/Unlinked Pass. Trip	$30.05	$5.55	$46.39	$19.96
Operating Expense/Vehicle Rev. Mile	$5.02	$3.39	$10.22	$3.02
Operating Expense/Vehicle Rev. Hour	$65.03	$38.55	$124.24	$42.43
TOTAL OPERATING EXPENSES	$15,554,758	$3,974,916	$5,905,831	$2,376,030

NOTE: Agencies use differing reporting methods and not all transit operating expenses are included. This data was developed at the commencement of the study and is for illustrative purposes.

ATTACHMENT 1
PAGE 21 OF 44

Some additional information regarding costs for these operators is shown below compared with others in the SCAG region:



V. Organizational Options

Within the transit industry, there have typically been three concepts discussed regarding organizational changes and alternatives – collaboration, coordination and consolidation. There are many such organizational approaches, including a number in California; the Orange County Transportation Authority (OCTA) is an example of full consolidation and the San Diego Association of Governments (SANDAG) is an example of moderate consolidation, with its operating units the Metropolitan Transit System (MTS) and the North County Transit District (NCTD). An example of a coordination model from outside California includes the Triangle region of North Carolina. The participating agencies, including the various transit operators, MPOs and Councils of

ATTACHMENT 1
PAGE 22 OF 44

Government have created an entity called "GoTriangle.com" to promote commuter services and benefits. A discussion of these and other organizational examples is included in Appendix IV. In addition, Appendix V illustrates specific attributes of the three models, including two variations of one of the models.

Collaboration

The first option, collaboration, suggests informal agreements by affected parties to modify or somewhat change the status quo. In a general sense, this is the model for how some aspects of transit programs in Ventura County are currently operated. Typical collaboration examples include: working cooperatively to develop an "800" information number; developing region-wide marketing ideas that can be shared by multiple agencies within the context of their own resources or entering into ad hoc agreements to "meet up" with paratransit or fixed route services.

As an example of Ventura County collaboration, VCTC has managed a number of cooperative efforts such as Smart Card, NextBus, Trapeze, and an "800" information number, and conducts some countywide marketing on a case-by-case basis. These efforts have met with varying degrees of cooperation among the operators. Also, a network has been developed by the various operators to connect ADA paratransit trips between multiple jurisdictions. The arrangement includes different agreements between operators regarding who provides the outbound and inbound trips, how those are coordinated with the service providers, etc. Based on experience of customers in Ventura County, these "ad hoc" connections may or may not work and are difficult to communicate and remember due to the number of scheduling and operational nuances. Because no one "owns" the whole trip, missed connections or "crossed wires" between operators can result in stranded customers. Also, the inconsistencies clearly confuse new customers.

In other studies around the country experience shows that collaboration has the benefit of retaining autonomy of the participating agencies but is dependent on these ad hoc arrangements, which can dissolve at any time, without a defined process and is thus unsustainable. Historically, while collaboration has worked on some levels in Ventura County, one of the limiting factors of these options is that these arrangements rely on the affected individuals to continue the collaboration. Staff and/or policy leadership changes may bring different perspectives and prior commitments may be modified or abandoned.

ATTACHMENT 1
PAGE 23 OF 24

Coordination

Coordination is usually thought of as a series of formal agreements among parties that modify the existing ways of doing business. The level and nature of coordination arrangements vary in nature and scope. With regard to coordination alternatives, there are examples that range from minimal coordination, which might be represented by the VISTA agreements, to maximum coordination, which in other states have required participation by agencies in order to be eligible for federal, state or local funding.

As an example of minimum coordination, the current VISTA corridor and dial-a-ride connection agreements are more specific than the dial-a-ride to dial-a-ride "meet up" agreements described in the section on collaboration. For example, there is a VISTA agreement with the City of Camarillo to share funding responsibility for the Route 101 connector through that community. However, each VISTA arrangement is unique, under its own advisory structure and does not function as part of an overall system.

In Ventura County a potential example of more extensive coordination would be to develop a countywide ADA paratransit service operated under a single agreement with joint procurement of vehicles, equipment or even facilities for other types of service. While this could be a step in a more incremental overall process, the disadvantages to this include that, even with formalized agreements, as in a Joint Powers Authority, individual cities could opt out, and also that the services frequently fall to the "lowest common denominator", and can be affected by changes in local priorities and/or the ability of a single jurisdiction to fund its share of service costs.

In some areas of the country, agencies providing transportation services have worked together to develop information technology concepts, service coordination ideas, facilities and processes based on their collective interest in improving service to the customers. This example, which has been called "Moderate Consolidation", appears to have more sustainability since it brings people together to improve processes and services. This sustainability is created through the development of interlocal agreements or memoranda of understanding. The development of these agreements formalizes the relationship between entities and jurisdictions, moving beyond the "ad hoc" nature of collaboration, towards a more sustainable solution. This is demonstrated in the Go Triangle example, in which the partnering entities have created a website which is jointly branded and communicated, and provides information in a consistent format on schedules, fares and trip planning. In development of more formal relationships, finding common ground to initiate the coordination is essential. Additionally, within this structure, as changes in finances or pressure from policy makers

ATTACHMENT 1
PAGE 24 OF 44

and customers occur, entities which previously did not participate can join in through similar interlocal agreements.

This concept could be implemented in Ventura County by greater commitment to coordination and would require the development of a formal agreement to work jointly on those areas of mutual interest in providing enhanced service to customers of the service. Under this arrangement services, such as the previously mentioned ADA paratransit, could be operated under a single contract, all IT purchases and programs could be coordinated through this coordinated process and that joint procurement could be used for vehicles, equipment and even facilities. Regarding ADA paratransit, currently several agencies contract for services with the same provider and the certification of eligibility for ADA paratransit is provided centrally under contract by VCTC. There appear to be opportunities to decrease some duplication and access some economies of scale from a cost standpoint and improve customer access and understanding by further coordination, restructuring and/or consolidation of ADA and senior paratransit services.

The information technology and intelligent transportation system components of ADA paratransit as well as other demand responsive services can also be facilitated by building onto current investments made in the county. VCTC has facilitated the development of a single vendor system for scheduling and dispatching of trips. This network has been implemented to different degrees by most jurisdictions in the County. With a more coordinated effort, the potential in Ventura County is to take current technology and use it to develop a coordinated system that involves more partnering agencies while retaining autonomy.

Another area of consideration in a model of coordination would be from a marketing and branding perspective. There is an opportunity to move towards the development of a joint website to include information from each of the partners to the coordination effort, to provide a consistent place and format to communicate information to the communities and the riders and customers of the services. As a complement to the branding and marketing, the development of a regional call center or trip planning concept can also be considered. While each of the operators currently has different service delivery methods, spans of services and infrastructure requirements, having a compilation of that information available through a uniform point of information would result in longer term consistencies that would benefit the customers and systems overall.

In the area of procurement, public transportation funds in Ventura County could be viewed from the perspective of regional priorities, as opposed to the procurement

processes developed by individual agencies. The joint procurement process has been used in several forms around the country, including statewide vehicle options, use of the General Services Administration specifications at the federal level and "piggyback" coordination where one agency uses the specifications of another to "add on" to their order. In many rural areas and several states, agencies have coordinated on maintenance plans and work, fueling and other aspects of public transportation. Gold Coast Transit has consistently take advantage of those practices. The current agreement between Moorpark and Simi Valley regarding the fueling of Moorpark-owned vehicles at the Simi Valley facility is another example in Ventura County.

The coordination alternatives, including those above, often relate to specific programs or projects. As a result, transitioning to these agreements from the current system can be less complex than other alternatives. In contrast, the consolidation alternatives listed below typically include more structural changes within organizations. Any structural change would offer new opportunities for doing business, but would also require a thorough retooling of many policies, programs and processes.

Consolidation

There are two general types of consolidation, full and moderate.

Full Consolidation typically means that a single agency offers all the services associated with public transportation including operation, policy, planning and funding. VCTC is the currently the only County-wide transportation agency, and as currently composed has representatives from all of the cities in Ventura County as well as the County itself; however a new countywide entity could be created for this purpose.

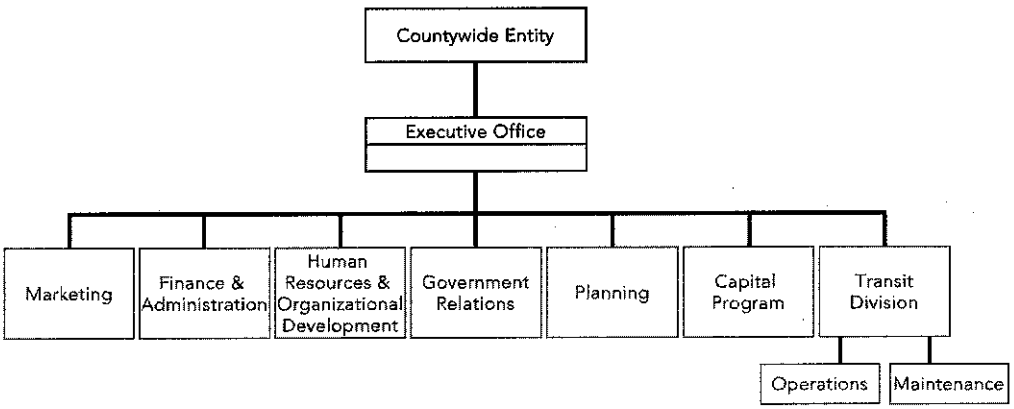
Considerations in the full consolidation approach include:

- The full range of decisions, from planning to operations, are centralized in one agency and inter-agency issues that often occur between planning and operating agencies can be addressed within one agency.
- The complex aspects of all processes are consolidated -- for example, interactions with all state and federal agencies are concentrated.
- The expanded range and complexity of issues can reduce the amount of time that the consolidated board could devote to specific operational, policy or funding issues.

ATTACHMENT 1
PAGE 26 OF 44

- There is capacity for "belt tightening" and resource reallocation within a larger organization, which is more difficult with smaller systems.
- Adding all the aspects of public transportation can require many organizational and skill set changes. These would include areas of administration such as human resources focus and direction, employee benefits and collective bargaining. Also, there would be an added dimension of direct customer service and public interaction. Finally, the variety of operation and maintenance, service delivery and coordination and other issues would be added responsibilities.

Maximum Consolidation



An alternative approach is *Moderate Consolidation*, where there is a central policy, planning and funding entity with one or two consolidated operating entities. The closest example in Ventura County of a multi-jurisdictional approach to public transit is the Gold Coast Transit Joint Powers Authority (JPA). However, in the case of Gold Coast a jurisdiction can opt out, leaving a gap in funding and service to be filled by the other member entities.

A true Moderate Consolidation approach provides stability and greater certainty for an operating entity.

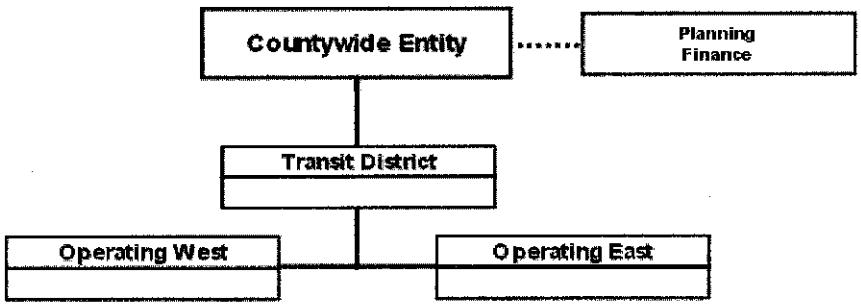
Considerations include:

- There can be economies of scale in consolidated operations and opportunity for more seamless, connected service.

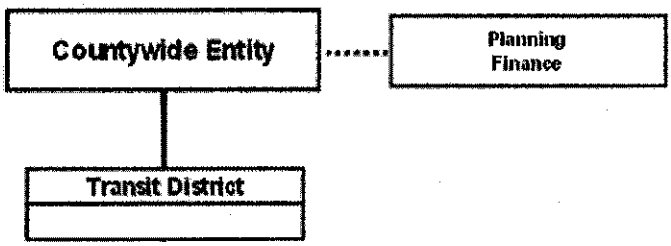
ATTACHMENT 1
PAGE 27 OF 44

- As a statutorily created entity, a transit district, unlike a JPA, is enabled to perform as a permanent entity with the ability to bond and pursue revenue measures.
- While two separate operating entities (for example, East County and West County) have the potential to better meet the needs of each area, these needs could also be addressed through a sub regional planning and programming approach and/or more formalized sub regional participation in policy decisions.

Moderate Consolidation – Two Operating Entities



Moderate Consolidation – One Operating Entity



ATTACHMENT 1
PAGE 28 OF 44

VI. Consideration of Alternatives

Steering Committee Direction

As outlined in Section III (Overview of the Study Process), the Commission-appointed Steering Committee was the touchstone for considering alternatives for delivering public transportation services in Ventura County. Throughout the study period, the Steering Committee guided an evolving process for considering alternatives. Progress is documented in status reports delivered to the Commission by the consultant team and staff.

Initial Vision

The Steering Committee identified elements of a vision for public transportation in Ventura County. Elements of this vision included a customer focus, creating a connected system that provided convenient service to key rider segments, minimizing travel time and required connections. The Steering Committee also envisioned a system that supported desired land use patterns, was feasible from an implementations standpoint as well as sustainable from a cost perspective

Evaluation Criteria

The Steering Committee identified potential system evaluation criteria. These included:

- Affordability – The system is both affordable for consumers and affordable to operate. Ideally, it should lead to improved farebox recovery and enhanced resources
- Implementability – The solution and design accounts for and addresses balance among costs, quality of service and efficiency, as well as barriers and opportunities related to policy, political realities and operational structures
- Connectivity – The alternative provides a more inter-connected approach that recognizes the challenges and costs in providing linkages among geographically-constrained areas (e.g., direct connections from Fillmore to Thousand Oaks)
- Quality – There is "no net loss" to existing customers, especially local and transit dependent riders. Both local and longer-distance services are focused on taking riders to where they need to go

ATTACHMENT 1
PAGE 29 OF 44

- **Efficiency** – The system efficiently provides service for the greatest number of people at peak times. The operations structure is efficient and with the most effective oversight

- **Frequency** --Service provides reasonable frequencies

At this point, they asked the team to consider a range of models and what could be successful for Ventura County, including structures that delineated planning from operations, subregional organization and re-considering VCTC's role as operator of the VISTA service.

System Models and Alternatives

The Steering Committee progressed to consideration of models and alternatives as outlined in Section V. of this report. At this point the Committee requested that the consultants and staff further explore two alternatives with some variations:

- **Full Consolidation** with provisions for strong continued local influence, potentially through a strong advisory or subcommittee structure to address East County, West County, Rural community needs and issues.

- **Moderate Consolidation with Two Operating Entities:** The type of entity was to be determined – it could be combination of District(s), Joint Powers Authority, federation or other.

They also identified additional key principles for moving forward:

- Keep communities whole – parameters would be determined but generally have at least the level of service they have now (possibly measured in terms of hours of service)

- Increase connectivity

- Improve local service

- Maintain a level of local influence and control

Operator Input

As the study report moved forward, Consultants and staff received input from the county's operators. The Executive Director was asked to respond to a series of questions posed by the Simi Valley City Manager on behalf of some of the operators (see letter and response in Appendix VI). At a follow-up meeting of the Steering

ATTACHMENT 1
PAGE 30 OF 44

Committee, the City Managers expressed concern with the level of engagement with the operators, asking that Coordination Alternative be added to the November, 2011 progress report on alternatives being considered and that top management-level representatives of the operators be included in a follow-up meeting with the Steering Committee. At this meeting, the Steering Committee asked the operators to present a specific proposal outlining their alternative concept.

VII. Policy Considerations

Throughout the Study, a variety of policy areas and issues arose and were researched and discussed with staff, the Steering Committee and the Commission. The following summarizes a number of those issues and the discussion and resolution.

Feasibility

- *Is transit service consolidation feasible, given Ventura County's geography and demographics?*

  Ventura County has a number of unique characteristics, including growth boundaries and limits, widely spaced communities with considerable open space, an extensive agriculture industry, suburban-type street patterns in a number of areas, and lack of county-wide cohesion and identity. However, from a transit operations perspective, there are also a number of similarities with other counties. Ventura County is not so unique that models from elsewhere are inapplicable. The primary goal of transit service restructuring is an integrated family of services, a common theme in many places. California alone has several examples of coordination, collaboration and consolidation. Orange County's single transportation agency and San Diego County's countywide planning and funding agency with two subregional operating agencies are examples of how these approaches could work in Ventura County. There appear to be no substantial obstacles to some form of transit restructuring.

- *Is there potential for cost savings and other efficiencies?*

  Numerous business models are available for comparison. There is no definitive way to predict either cost savings or efficiencies resulting from a particular institutional arrangement until planning and execution is well under way; however, substantial savings have been realized in other consolidations. Savings

typically result from reduced overhead costs by eliminating duplicative functions (such as purchasing, human resources, financial, and the like) and efficiencies of scale.

- *Can transit operators continue to meet TDA farebox recovery requirements?*

  Under the current organizational structure, it has been indicated that a number of the operators may not achieve the required farebox recovery rates, and will have to raise fares, decrease services, and/or use TDA revenues for eligible transit capital activities.

  Under a fully or moderately consolidated service, with substantially the same mix of contract and non-contract services, it is likely that farebox recovery requirements would be met, since services can be aggregated, even if services are expanded to fully use all available TDA funds for new services.

  With the partial consolidation proposed by the operators, the likelihood of some jurisdictions meeting farebox recovery requirements is less clear. Also unclear is the potential effect of allowing TDA funds to be used for streets and roads uses beyond July 1, 2014, assuming SB 716 is amended.

Funding

- *What would be the impact of SB 716 on TDA funding allocations?*

  VCTC staff estimates that if SB 716 was in effect, using 2010-11 data (the latest available) slightly over $3,000,000 out of a total TDA allocation of $20,884,000 would be shifted from streets and roads uses to transit. Some cities, including Ventura and Oxnard, currently allocate all of their TDA funding to transit.

- *What would be the impact of transit service restructuring on transportation funding sources other than TDA?*

  Streets and roads – SB 716 will require all TDA funds to be used for transit, so streets and roads funding would have to be derived from other sources. The local and regional decision processes for streets and roads funding will not change.

  Federal funding eligibility and competitiveness – Restructuring will have no impact on eligibility for Federal funds but should make the region more competitive as there will be a more unified "voice" (or voices) seeking funding.

ATTACHMENT 1
PAGE 32 OF 44

Metrolink – Funding policy and decisions will be made through the existing processes. If a new countywide organization were to be created, it would assume the current role of VCTC in Metrolink funding.

Authority

- *What would be the role of a consolidated agency and board in assuring responsiveness to citizens and communities?*

  Clearer lines of authority should increase citizen knowledge of the management and decision-making processes and increase their access to them. If the VCTC Board or a similar successor assumed the role of a consolidated agency, or a planning and funding agency supervising subordinate operating agencies, the governing board would still consist of local officials who would be accessible as they are today.

  Under the operators proposal, people would communicate with the operations and management of the services conducted under the Memorandum of Understanding through the local officials of cities that are parties to the MOU. Under the proposed Gold Coast Transit District, individuals and communities would communicate with the GCTD governing board and management. VCTC would not have a direct role in facilitating citizen input to these entities.

- *Would there be provisions for regional, subregional and local advisory committee structures?*

  Under the full and moderate consolidation options, alternatives discussed and recommended by the Steering Committee include local and sub-regional input structures, and cities could also maintain local advisory bodies. Under the operators proposal the operating entities would determine advisory structures.

- *How would local jurisdictions be engaged, and what would be their role in service decisions?*

  Under the full and moderate consolidation options, decisions would be made at the regional level, but still tailored to local needs with local input. Decisions would be more localized with independent operating entities under the operator proposal.

ATTACHMENT 1
PAGE 33 OF 44

Impact

- *Would there be mandates on local jurisdictions for funding participation, levels of service or other performance?*

  Under full and moderate consolidation options, local funding or service enhancements would be encouraged, but there will be no required local participation or funding contributions (and no authority to require them). The proposed GCTD would typically not have legal authority to do so either, and the MOU cities could determine such enhancements for themselves.

- *What would be the effect on for represented employees, including role of unions, and what transition plans would be needed?*

  There are numerous rules and regulations to be followed, and a fairly complex transition can be anticipated. Organizational and employment transitions have been successfully implemented in many other jurisdictions, and there appear to be no inherent obstacles to doing so with any of the proposed organizational structures.

- *How would service and funding levels be balanced throughout the county?*

  VCTC has a track record of county-wide balance that should not change with a consolidated organizational structure. Under the operators proposal, VCTC would continue to have a role in allocating county-wide and discretionary funding but would not have a direct voice in service levels, which would be determined by the GCTD and the MOU.

Further discussion of policy and operational outcomes, more specifically oriented to the operators proposal, is included in the "Organizational Alternatives Considerations" matrix beginning on page 38 of this report.

ATTACHMENT 1
PAGE 34 OF 44

VIII. Operators Proposal

The "operators proposal" was developed by a subgroup of the operators including Gold Coast Transit, Moorpark, Simi Valley, and Thousand Oaks. VCTC staff was invited to participate in the meetings on behalf of VISTA but did not actively participate in development of the proposal. County staff also participated in the meeting but the County was not signatory to the proposal. This proposal was presented to the Steering Committee on January 13, 2012. This operational concept is presented in more detail in Appendix VIII. The basic concepts are:

- Create a Gold Coast Transit District to serve West County communities, including Heritage Valley (Santa Paula, Fillmore and Piru) with the District claiming TDA in West County
- Transition VISTA service (with the exception of VISTA East) to the new District
- Create an MOU to govern service coordination in East County
- Allow East County cities (Camarillo, Moorpark, Simi Valley and Thousand Oaks) to file for TDA Article 8 purposes (for streets and roads) if there are no unmet transit needs

While this proposal bears some relationship to the "Hybird Moderate Consolidation model", it varies significantly in that it calls for the more informal structure of a Memorandum of Understanding (MOU) to implement the East County service concept. In addition, the proposed operating entities would not be subordinate to VCTC.

Final Proposal as Presented to the Steering Committee

The operators presented a consensus proposal signed by management representatives. Signatories included the city managers of cities responsible for operating transit systems. The Gold Coast Transit General Manager signed the proposal on behalf of communities served by Gold Coast Transit. VCTC as the operator of VISTA and the County of Ventura did not sign the proposal. As explained by the operators, this proposal was intended as a framework and would require further development and resolution of specific details. The full text of the operators proposal (including the Guiding Principles) is presented in the letter in Appendix VII. Essential concepts include:

- **Separate West County and East County Models:** A Gold Coast Transit District would be created to serve West County, including Heritage Valley, and a formal

ATTACHMENT 1
PAGE 35 OF 44

Memorandum of Understanding (MOU) would be established in East County for operation and coordination of bus and ADA services, fares and hours of service.

- **VISTA Service Transition**: VISTA service (with the exception of VISTA East) would be transitioned to the new Gold Coast Transit District. VISTA services, with the exception of VISTA East will be transitioned from VCTC, with the expectation that Gold Coast Transit District would operate most or all of the service under contract.

- **TDA Allocation**: TDA would be apportioned to the Gold Coast Transit District in West County. TDA would be returned to individual jurisdictions in East County (unless individual jurisdictions chose to join the District).

- **Certain Exclusions from SB 716 Requirements**: Cities outside the Gold Coast Transit District (initially all East County cities) would be allowed to continue to file claims for Article 8 purposes (use TDA for streets and roads as long as there are not unmet transit needs that are determined to be reasonable to be meet under the existing TDA Article 8 process).

The operators proposal was accompanied by recommended Guiding Principles for a Regional Transit Plan:

1. It is the fundamental right of local agencies to determine how to provide local services.

2. Existing TDA farebox requirements do not adequately account for the impacts of federal regulations and a lower farebox ratio should be proposed.[1]

3. Transit funds locally generated (such as TDA and FTA funds) must be distributed to and controlled by the local agency.

4. Consolidation of local ADA and DAR operations into no more than two regions is a desirable outcome.

Steering Committee Recommendations on Proposal

After discussion with the operators, VCTC staff and the consultant team, the Steering Committee recommended the following:

[1] Subsequent to presenting their proposal, all operators have agreed that this is no longer an issue to be addressed in the Operators' Proposal but, as an issue for operators statewide, would be addressed at a later date.

ATTACHMENT 1
PAGE 36 OF 44

- Include Customer Focus as a top priority in any Guiding Principles
- Express consensus support for the operators' structural proposal
- Further consolidation would be pursued at a future undetermined date

An open question remained as to the operators' proposal for use of TDA for street and road purposes, especially as it relates to a possible Commission position on seeking amendment to SB 716's provision that TDA is to be used exclusively for public transit in Ventura County starting in July 2014.

IX. Commission Direction and Recommendations

At the March 2, 2012 VCTC meeting the Commission received a report on the operators proposal and Steering Committee direction. After extensive discussion, the Commission acted to: *"Support the Operators proposal in concept with the understanding that all cities would have flexible use of TDA funds and further discussion of Heritage Valley Service would take place before a proposal is brought back to VCTC on April 13th with the specifics fleshed out and with the recognition that the concept of full consolidation will continue to be discussed as a long term goal. Staff was directed to work with City Managers to flesh out specifics."*

X. Considerations for Moving Forward

Impact on VISTA Funding and Operations

Subsequent to the March 2 VCTC meeting VCTC staff and the consultant team met with the operators, and VCTC staff met with the City Managers, to discuss several issues that have developed based on the VCTC action.

For example, the organizational model approved would affect service delivery by transitioning the responsibility for VISTA operations. Since VISTA is the major provider of interjurisdictional connector, intercounty commuter and Heritage Valley local service, a key area of discussion has been the future of VISTA and sustainability of this service

given anticipated shortfalls in funding. As of late March, the following proposed agreements have been developed between the jurisdictions and VISTA:

- Operation of VISTA service would transition over time to Gold Coast Transit and East County once the District has been created and the MOU has been finalized and is in operation. Transition of VISTA services to GCTD operation/management would be dependent on individual agreements being executed with the Santa Barbara County Association of Governments (SBCAG) for the Coastal Express, CSUCI for the University Shuttle services, and local agencies outside of the GCTD area for the local shares of the VISTA operating costs.
- VISTA would continue to be a contract operation for the foreseeable future.
- VISTA and Heritage Valley service levels would be maintained ("made whole") and, if possible, improved incorporating use of VCTC discretionary STA funding and Federal Transit Assistance funds from the Thousand Oaks UZA which are not attributable to the service or population of the Cities of Moorpark and Thousand Oaks.

Implementation Issues to be Resolved

Through the discussion of the West County/East County proposal, certain policy, operations and funding issues have been identified for resolution. While these issues have been a source of continuing discussion among the operators, VCTC and the consultant team, progress is being made. The initial implementation questions and issues are presented in the following table.

ATTACHMENT 1
PAGE 38 OF 44

Organizational Alternatives Considerations

GOVERNANCE

Original Study Models				January, 2012 Operators Proposal and Outcomes	Issues In Operators Proposal for Future Resolution
Status Quo / Collaboration	Moderate Coordination	Moderate Consolidation	Full Consolidation		
Distributed among entities who have varying governance structures (e.g. RTPA, JPA, City Council, VISTA Committees)	Generally distributed but centralized for individual issues (e.g. Coordinating Committee for ADA paratransit)	At least two managing boards (e.g. one for planning, one or more for operations).	Countywide central entity including fully centralized staffing	VCTC as Regional Transportation Planning Agency (RTPA) Gold Coast Transit District in West County and Heritage Valley Individual operators with MOU for service coordination in East County	Role and responsibilities of VCTC Gold Coast Transit District board composition Governance of ADA paratransit operations – East County, West County and Countywide Role of Gold Coast Transit District in Heritage Valley

ATTACHMENT 1
PAGE 39 OF 44

FINANCIAL

Original Study Models				January, 2012 Operators Proposal and Outcomes	Issues In Operators Proposal for Future Resolution
Status Quo / Collaboration	Moderate Coordination	Moderate Consolidation	Full Consolidation		
Primary financial decisions made by individual agencies Some interaction with central agency for federal and state funds (e.g. grants) Some funding directly to individual entity If SB 716 is implemented without change, all TDA funds must be used for transit. This will be disruptive to some cities	Primary decisions made individually Centralized funding for coordinated issues typically require local match (e.g. Federal grants) Some reallocation of funds may be required to support coordinated functions	Different types of funds controlled by each entity Some collaboration of funding requests likely for larger projects Each entity can pursue financial opportunities (e.g. bonding, tax levies) Some reallocation of funds may be required to support consolidated functions Consolidated functions could result in greater efficiencies and effectiveness	Receives and manages all funding for public transportation Can bond for funding or pursue tax levies Some reallocation of funds may be required to support consolidated functions Consolidated functions could result in greater efficiencies and effectiveness	VCTC responsible for discretionary funds All cities would retain the option to use TDA funds for streets and roads. Cities could also provide TDA funds to Gold Coast Transit District as some do now* * Reflects change from operators proposal by VCTC 3/3/2012	Arrangements for joint procurement Potential remaining east/west imbalance between level of funding and needs Continued discretion for cities to use TDA for streets and roads is dependent on amendment to SB 716. Performance standards for discretionary funds

ATTACHMENT 1
PAGE 40 OF 44

PLANNING

Original Study Models				January, 2012 Operators Proposal and Outcomes	Issues In Operators Proposal for Future Resolution
Status Quo / Collaboration	Moderate Coordination	Moderate Consolidation	Full Consolidation		
Individual agency and operator plans Some collaborative planning based on regional plans and other joint efforts (e.g. inter-agency transfers, VCTC programs)	Primary planning is still done locally, but coordinated planning required for specific coordinated agreement projects	More joint planning occurs (e.g. overall long-range planning responsibility of planning agency), but each operating agency does own planning	Conducts all long-range, short-range and operational planning	ADA services provided by no more than two entities VCTC conducts long-range planning. Gold Coast District performs own service planning East County cities plan own systems under MOU agreement	Planning and funding for ADA paratransit in East County Planning for coordination and services for ADA between East and West County Planning for VISTA services between East and West County and into Los Angeles and Santa Barbara Counties Extent of VCTC involvement in level of service and countywide coordination

ATTACHMENT 1
PAGE 41 OF 44

OPERATIONS

Original Study Models				January, 2012 Operators Proposal and Outcomes	Issues In Operators Proposal for Future Resolution
Status Quo / Collaboration	Moderate Coordination	Moderate Consolidation	Full Consolidation		
Mix of individual operations, including contract and in-house Some collaborated opportunities for transfers, joint use of facilities, etc.	Coordination for specific projects (e.g. countywide ADA Paratransit) could expand to more agencies -- and projects if successful such as call center, procurement, etc.	Possible efficiencies/cost savings from consolidated operations consolidated under operating entity or entities (e.g. one or two Districts directly operate and/or contract for operations) May be limited number of continuing individual local operations in cities	Possible efficiencies/cost savings from consolidated operations, with directly operating and/or contracting for all public transportation services	Gold Coast District Operates all service for member jurisdictions and assumes operation of VISTA (except VISTA East) East County cities operate own systems and operate VISTA East under MOU	Potential for continued and/or expanded contract operation (e.g. VISTA, ADA Paratransit) Operating responsibility for ADA service between GCTD and East County MOU Nature of Gold Coast Transit District arrangements with non-member agencies for continued VISTA service (e.g., SBCAG and CSUCI)

ATTACHMENT 1
PAGE 42 OF 44

COMMUNICATIONS, MARKETING AND FARES

Original Study Models				January, 2012 Operators Proposal and Outcomes	Issues In Operators Proposal for Future Resolution
Status Quo / Collaboration	Moderate Coordination	Moderate Consolidation	Full Consolidation		
Some centralized information and marketing Central ADA paratransit eligibility	Combined marketing and call center could improve customer satisfaction by having a single source for information	Broader communications and marketing responsibilities coordinated between managing entity and District(s)	Countywide entity has all communications and marketing responsibilities	Communications and marketing responsibilities coordinated between VCTC, Gold Coast District and East County operators.	Role of VCTC in countywide communications, marketing and fare coordination Resolution of disparity of fare and eligibility requirements among operators

ATTACHMENT 1
PAGE 43 OF 44

Operator Response to Implementation Questions

The operators are making progress in responding to these issues and further work is being done in parallel with submittal of this report to the Legislature. The initial operator response to implementation questions and requests for specifics on the proposed creation of a Gold Coast Transit District and the East County MOU is included in Appendix VIII.

XI. Conclusions and Next Steps

As the RTPA and operator of VISTA, VCTC will continue to have an integral role in development of a more customer-focused, coordinated and consolidated transit system in Ventura County. With final Commission action to forward this report to the Legislature, the operators and VCTC intend to implement the model presented in the operators proposal with potential for further consolidation of services. Gold Coast Transit will take further steps to create a transit district. This will include identifying a sponsor to carry forward the legislation needed to create a transit district.

As detailed in the letter of response from the operators, East County operators intend to develop the MOU for further coordination and potential future consolidation of services. A timeline has not yet been developed for the MOU and specifics, including arrangements for operation of VISTA East and responsibilities for a one- or two-operator ADA paratransit system.

VCTC staff will work with the operators on the needed funding, planning and operational arrangements required for transition VISTA service upon creation of the Gold Coast Transit District and transition VISTA East under the arrangements designated in the East County Memorandum of Understanding.