

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

## BOARD OF DIRECTORS REGULAR MEETING AGENDA MARCH 9, 2001 (Second Friday of Each Month) SCMTD ENCINAL CONFERENCE ROOM \*370 ENCINAL STREET, SUITE 100\* SANTA CRUZ, CALIFORNIA

### SECTION I: OPEN SESSION - 8:30a.m.

1. ROLL CALL
2. REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION: District Counsel
3. ORAL AND WRITTEN COMMUNICATION REGARDING CLOSED SESSION

### SECTION II: CLOSED SESSION

1. CONFERENCE WITH LEGAL COUNSEL - EXISTING LITIGATION  
Pursuant to Subdivision (a) of Government Code Section 54956.9
  - a. Name of Case: Christine Jones v. Macerich Co. et al.  
Intervenor: Santa Cruz Metropolitan Transit District
2. CONFERENCE WITH LABOR NEGOTIATOR  
Pursuant to Government Code Section 54957.6.
  - a. Agency Negotiator: Paul Chandley  
  
Employee Organization: Service Employees Int'l Union, Local 415 (SEIU)

### SECTION III: RECONVENE TO OPEN SESSION

1. REPORT OF CLOSED SESSION
2. ORAL AND WRITTEN COMMUNICATIONS - **NOT PRIOR TO 9:00 A.M.**
  - a. Georgene Craven, IBAR Settlement Co. RE: Paratransit Service
  - b. Patricia Spence RE: Paratransit Service
  - c. Brenda Moss, Senior Network Services RE: Paratransit Service
  - d. Patricia Spence RE: ADA Standards
3. LABOR ORGANIZATION COMMUNICATIONS
4. METRO USERS GROUP (MUG) COMMUNICATIONS

\* Please note: Location of Meeting Place

5. METRO ACCESSIBLE SERVICES TRANSIT FORUM (MASTF) COMMUNICATIONS
6. ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS

**CONSENT AGENDA**

- 7-1. APPROVE REGULAR BOARD MEETING MINUTES OF 2/9/01 AND 2/16/01  
Minutes: Attached
- 7-2. ACCEPT AND FILE PRELIMINARILY APPROVED CLAIMS  
Report: Attached
- 7-3. ACCEPT AND FILE PASSENGER LIFT REPORT FOR FEBRUARY 2001  
Report: Attached
- 7-4. CONSIDERATION OF TORT CLAIMS: Deny the claims of: Gary Shirk; Andy Armanino; CSE Ins. Group. Deny the application to file a late claim and reject the claim as untimely: Michael Roberts
- 7-5. ACCEPT AND FILE MINUTES OF MASTF COMMITTEE MEETING OF 2/15/01  
Minutes: Attached
- 7-6. ACCEPT AND FILE MINUTES OF MUG COMMITTEE MEETING OF 2/14/01  
Minutes: Attached
- 7-7. ACCEPT AND FILE MONTHLY BUDGET STATUS REPORT FOR JANUARY 2001, APPROVAL OF BUDGET TRANSFERS  
Staff Report: Attached
- 7-8. CONSIDERATION OF APPROVAL OF EMPLOYMENT PRACTICES LIABILITY INSURANCE  
Staff Report: Attached
- 7-9. CONSIDERATION OF DECLARATION OF VEHICLE #809 AS EXCESS AND AUTHORIZATION OF DISPOSAL  
Staff Report: Attached
- 7-10. ACCEPT AND FILE STATUS REPORT ON ADA PARATRANSIT PROGRAM FOR JANUARY 2001  
Staff Report: To Be Included in the Add-On Packet
- 7-11. ACCEPT AND FILE HIGHWAY 17 STATUS REPORT FOR JANUARY 2001  
Staff Report: Attached

- 7-12. ACCEPT AND FILE UNIVERSITY OF CALIFORNIA, SANTA CRUZ SERVICE STATUS REPORT  
Staff Report: To Be Included in the Add-On Packet
- 7-13. ACCEPT AND FILE RIDERSHIP REPORT FOR THE HOMELESS SHELTER SHUTTLE  
Staff Report: Attached

### **REGULAR AGENDA**

8. PRESENTATION OF EMPLOYEE LONGEVITY AWARDS  
Presented by: Sheryl Ainsworth, Chair  
Staff Report: Attached
9. CONSIDERATION OF SETTING NOTIFICATION OF INITIATION OF ENVIRONMENTAL IMPACT REPORT (EIR) FOR METROBASE AND CONSIDERATION OF SETTING DATE, LOCATION AND FORMAT FOR A PUBLIC SCOPING MEETING  
Presented by: Les White, General Manager  
Staff Report: Attached
10. CONSIDERATION OF APPROVAL OF FY 01-02 PRELIMINARY LINE ITEM BUDGET FOR REVIEW AND CLAIMS PURPOSES  
Presented by: Elisabeth Ross, Finance Manager  
Staff Report: Attached
11. CONSIDERATION OF APPRECIATION TO EMPLOYEES WHO TRANSPORTED BUSES FROM FOOTHILL TRANSIT TO SANTA CRUZ  
Presented by: Bryant Baehr, Operations Manager  
Staff Report: Attached
12. CONSIDERATION OF PARATRANSIT PROGRAM LEGAL REQUIREMENTS  
Presented by: Margaret Gallagher, District Counsel  
Staff Report: Oral Presentation
13. CONSIDERATION OF AMENDING THE TRANSIT DISTRICT'S PARATRANSIT PLAN AFFECTING THE ELIGIBILITY OF CURRENT PARATRANSIT USERS AND NEW APPLICANTS, INCLUDING DISCONTINUING THE PRACTICE OF ALLOWING NEW PARATRANSIT APPLICANTS USE OF THE PARATRANSIT SERVICE PENDING PROCESSING OF THEIR APPLICATIONS. CONSIDERATION OF FINALIZING NELSON NYGAARD'S RECOMMENDATIONS FOR THE RECERTIFICATION PLAN FOR CURRENT APPLICANTS.  
Presented by: Kim Chin, Planning and Marketing Manager  
Staff Report: Attached

14. CONSIDERATION OF AMENDMENT TO CONTRACT WITH MULTISYSTEMS FOR DEVELOPMENT OF JOB DESCRIPTION FOR PARATRANSIT MANAGER, PREPARATION OF PARATRANSIT RIDERS' GUIDE AND DEVELOPMENT OF REQUEST FOR PROPOSALS FOR PARATRANSIT PROGRAM OPERATION, INCLUDING ASSISTANCE WITH PROCUREMENT PROCESS.  
Presented by: Kim Chin, Planning and Marketing Manager  
Staff Report: Attached  
**ACTION TO BE TAKEN AT THE 3/9/01 MEETING**
15. CONSIDERATION OF DISTRICT ISSUING PREPAID FARES FOR ADA PARATRANSIT SERVICE  
Presented by: Mark Dorfman, Assistant General Manager  
Staff Report: Attached
16. CONSIDERATION OF PROVISION OF ADA PARATRANSIT COUPONS FOR MEMBERS OF THE MASTF EXECUTIVE COMMITTEE WHO ARE ELIGIBLE TO USE THE ADA COMPLIMENTARY PARATRANSIT SERVICE  
Presented by: Mark Dorfman, Assistant General Manager  
Staff Report: Attached
17. CONSIDERATION OF AUTHORIZATION OF APPLICATION TO CALTRANS FOR FY 00/01 RURAL OPERATING ASSISTANCE  
Presented by: Mark Dorfman, Assistant General Manager  
Staff Report: Attached
18. CONSIDERATION OF APPROVAL TO AMEND THE DAY WIRELESS SYSTEMS CONTRACT FOR AN ADDITIONAL ONE-YEAR TERM  
Presented by: Tom Stickel, Fleet Maintenance Manager  
Staff Report: Attached
19. CONSIDERATION OF APPROVAL TO AMEND THE MISSION LINEN AND UNIFORM SERVICE CONTRACT FOR AN ADDITIONAL ONE-YEAR TERM  
Presented by: Tom Stickel, Fleet Maintenance Manager  
Staff Report: Attached
20. CONSIDERATION OF APPROVAL TO PAY FOR ADDITIONAL REPAIRS TO FREDERICK'S ELECTRONICS (PLANTRONICS) PARKING LOT EXPANSION PROJECT  
Presented by: Tom Stickel, Fleet Maintenance Manager  
Staff Report: Attached
21. CONSIDERATION OF APPROVAL OF NEW BUS SPECIFICATIONS TO INCLUDE THE ABILITY TO BE CONVERTED FROM DIESEL TO COMPRESSED NATURAL GAS (CNG)  
Presented by: Tom Stickel, Fleet Maintenance Manager  
Staff Report: Attached

22. **CONSIDERATION OF QUANTITIES FOR BUS PROCUREMENT**  
Presented by: Mark Dorfman, Assistant General Manager  
Staff Report: Attached
  
23. **CONSIDERATION OF AMENDING BOARD OF DIRECTOR MEETING LOCATIONS FOR 2001 BOARD MEETINGS**  
Presented by: Les White, General Manager  
Staff Report: Attached

## **ADJOURN**

### **NOTICE TO PUBLIC**

Members of the public may address the Board of Directors on a topic not on the agenda but within the jurisdiction of the Board of Directors or on the consent agenda by approaching the Board during consideration of Agenda Item #1 "Oral and Written Communications", under Section III. Presentations will be limited in time in accordance with District Resolution 69-2-1. Members of the public may address the Board of Directors on a topic on the agenda by approaching the Board immediately after presentation of the staff report but before the Board of Directors' deliberation on the topic to be addressed. Presentations will be limited in time in accordance with District Resolution 69-2-1.

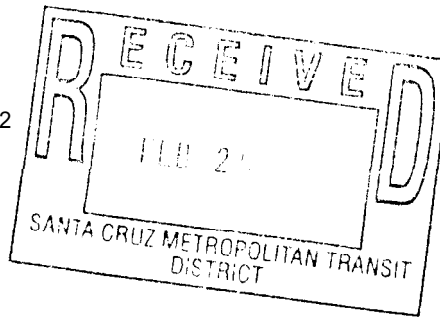
When addressing the Board, the individual may, but is not required to, provide his/her name and address in an audible tone for the record.

The Santa Cruz Metropolitan Transit District does not discriminate on the basis of disability. The Encinal Conference Room is located in an accessible facility. If you wish to attend this meeting and require special assistance in order to participate, please Dale Carr at 426-6080 at least 72 hours in advance of the Board of Directors meeting.

## IBAR SETTLEMENT COMPANY, INC.

Special Needs Trust & Advisory Trust Department  
PMB 263, 5960 South Land Park Drive, Sacramento, California 95822  
Telephone/Fax (916) 421-9545 . E-mail: glcraven@sprintmail.com

February 21, 2001



Board of Directors  
Santa Cruz Metropolitan Transit District  
370 Encinal, Suite 100  
Santa Cruz, CA 95060

RE: PARATRANSIT SERVICES

It is my understanding that you will be taking the issue of coupon use for para transit services under consideration at the March 9, 2001 meeting. I urge you to decide favorably on this issue for a number of reasons:

Individuals on public benefits have little or no disposable cash each month. By having the ability to prepay for this service, it offers friends and relatives the opportunity to assist without the disruption of public benefits (cash gifts are considered as income);

Beneficiaries can prepay for coupons when they receive their benefit checks, thereby insuring that they have the necessary transportation to medical appointments and shopping;

It provides the ability for social opportunities that might not otherwise be available and;

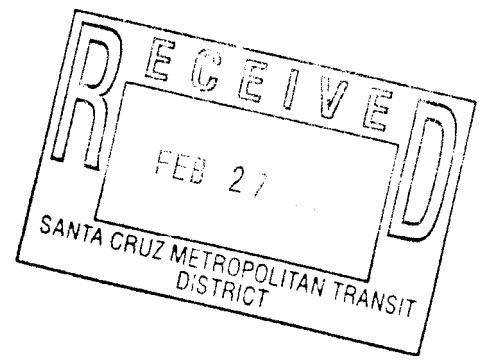
Lastly, it provides a degree of independence that is otherwise very limited to those that are severely disabled and do not have a network that provides critical transportation services.

Thank you for your consideration.

Sincerely,  
IBAR SETTLEMENT COMPANY, INC.

Georgene L. Craven  
Special Needs Trust Administrator

February 23, 2001



Santa Cruz Metropolitan Transit District  
Board of Directors  
c/o Sheryl Ainsworth, Chair  
370 Encinal Street  
Santa Cruz, CA 95060

Dear Board Members,

Over the past two years I have been an out spoken advocate for people with disabilities in relation to the paratransit service provided by Lift Line. I have stated shortcomings and safety/maintenance deficiencies in past letters to John Daugherty, Accessible Services Coordinator and Lift Line transportation directors. I am encouraged to say that most of the observations have been repeated in recommendations by the Multi-Systems audit to the Board. When finding negative areas on the service, I have also attempted to find solutions. It is with this in mind that I am writing this letter.

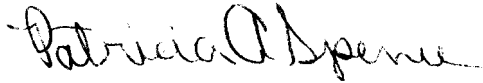
Are the sons guilty for the sins of the father? All present members of each body responsible for providing paratransit service are different individuals from previous years and not even continuing members on the various boards and management levels since the service was first put in place and evolved through the years. This includes Board members, METRO management, and directors and employees Food and Nutrition and Lift Line. In particular Mark Hartunian has been transportation director only since October 2000. Sam Story has been director of Food and Nutrition for a just over 1 year. A portion of the METRO Board members changes every two years. Some of METRO's top management maybe has been in place the longest - about six to eight years.

Therefore, no one agency or management group is solely responsible for the service as it exists today. Any deficiency that is found with Lift Line's delivery of the service can be accountable in an "up the chain of command" to the various decision making bodies and management. As found in the audit by Multi-Systems, in the past METRO management and the Board of Directors have not been actively involved in managing, overseeing and monitoring the service. The program has grown to what it has become today often without direction from those responsible.

I urge Board members and management to accept their own level of responsibility and the evolution of the program. To be harsh and overly critical of the present broker's delivery is to be harsh and critical of past boards, management and the direction as provided. It is not reasonable to expect the Lift Line/CTSA of today to implement changes in delivering service "on a dime". If the Board and METRO management follow the audit recommendations and work with Lift Line management and be responsive to the community it serves, I'm sure that the present program can be built on to provide a greatly improved paratransit program. The following as quoted from an August 11, 1999 letter copied to Mr. Daugherty: "I have attempted to present my experiences in a positive manner looking for solutions to problems. I hope they have been received as intended. The ADA transportation agencies in Santa Cruz County perform a valuable, appreciated service to those who depend on it. I feel refinements to make it a model of excellence in service are forthcoming."

Are the sons guilty for the sins of the father? No, but they can conduct themselves in a non-reactionary manner and dedicate themselves to building rather than the tearing down of relationships and service in a vital program to people with disabilities in Santa Cruz County.

Sincerely,

A handwritten signature in cursive script that reads "Patricia A. Spence".

Patricia A. Spence  
720 Oregon Street  
Watsonville, CA 95076  
728-2767

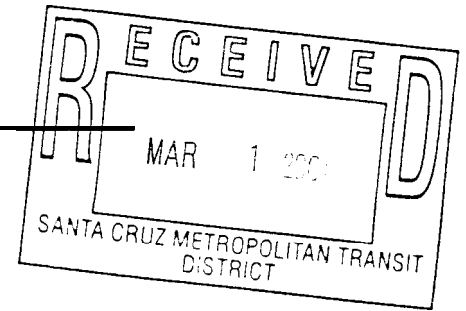
cc: MASTF  
METRO, Kim Chin, Les White, John Daughtery  
Lift Line, Mark Hartunian  
FNS, Sam Story  
Stroke Center, Caroline Bliss-Isberg



# SENIOR NETWORK SERVICES

**1777-A Capitola Road  
Santa Cruz, CA 95062  
(831) 462-1 433**

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March 1, 2001

Ms. Sheryl Ainsworth, Chairperson  
Santa Cruz Metropolitan Transit District  
370 Encinal Street  
Santa Cruz, CA 95060

Dear Ms. Ainsworth:

I would like to address a number of issues which have been acted upon and/or discussed by the District recently and which have the potential to adversely affect elderly residents of Santa Cruz county.

Discontinuance of the Pre-paid Coupon Program: After paying for expensive housing costs, many county residents have very little disposable income left over to meet their transportation needs. The pre-paid coupon program was especially valuable to seniors in helping them budget. Frail and disabled people prefer not to carry cash due to their physical vulnerability. Cognitively impaired seniors and disabled younger people who have their money managed by the Public Guardian benefited by the pre-paid coupon program because their transportation allotment could be allocated each month in a manner that could not be spent on other items.

Connecting Unserved Areas to the ADA Para-transit System: Many Seniors and people with disabilities are finding that the **only** housing that they can afford in Santa Cruz County is in remote areas. Transportation becomes a great problem as they are the same people who rely on para-transit to get to medical and other appointments. Easy access to the **para-transit** system is critical for these users.

Evaluation of the Para-Transit System: We applaud the District's efforts to improve the para-transit system by engaging the services of an independent consultant. We support the **Nelson/Nygaard** recommendation that the agency chosen to conduct the user re-certifications be one that specializes in disability issues. A fair process requires evaluators who are completely non-biased when assessing each individual's unique abilities.



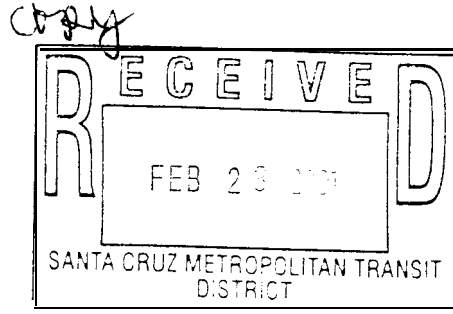
30 Start-Up Period: We have heard that the 30 day “grace” period might be eliminated and that future users of para-transit may be asked to come to a face-to-face interview. While there may be many cases where this will not be a problem, we strongly request that some provision be made for home assessments for people who can barely get to their essential doctor appointments and for whom another assessment away from home will be too difficult. Anyone of us can become “para-transit eligible” overnight with a stroke or an accident. It is often during the days immediately following hospitalization for such an event that a person is most in need of para-transit services as they struggle to make sense of their new limitations. For case managers and nurses, it has been invaluable to be able to start para-transit service immediately with the allowed 30-day grace period.

Thank you for taking the time to read these comments. I would be happy to discuss the points made here with you at any time and will be waiting to see how the proposed changes improve para-transit services in Santa Cruz County.

Sincerely,

A handwritten signature in cursive script that reads "Brenda Moss".

Brenda Moss, Executive Director  
Senior Network Services



February 26, 2001

Santa Cruz City Council  
c/o Richard Wilson, City Manager  
809 Center Street, Room 10  
Santa Cruz, CA 95060

Dear City Council:

On January 19, 2001 I experienced my first opportunity to visit the Santa Cruz City Council Chambers for a Santa Cruz Metropolitan Transit District Board of Directors meeting. As a person with disabilities, this experience was not favorable concerning access requirements. Although not overtly blatant in non-compliance, the three areas effecting my use did cause hardship, concern and extraordinary effort to attend a meeting at the Chambers.

I survived a stroke and have right side hemiplegia (paralysis) and use a manual wheel chair. To illustrate function, one foot is on a footrest and I use only one hand on the rim and one leg/foot to move the chair.

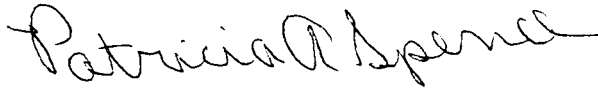
These areas were as follows:

- The sill at the main entry door does not meet Title 24 and ADA regulations that require a smoother threshold to be maximum of 1/2 inch high with a 1:2 beveled edge on both interior and exterior edges. The present threshold is somewhat lower than the outside tiled corridor. It also has an approximately 1/4 to 3/8 inch vertical section the door closes against to, I guess, prevent drafts. The front wheels of the wheelchair fall into the lower area and is compounded by not being able to get over the vertical lip. The combination of these two factors I was unable to go through the door face-first.
- The aisle carpet is extremely difficult to move a manual wheelchair on. The regulations do not contain requirements for carpets, but some naps such as a tight, low looped pile are much easier to move on. This factor should be taken into consideration when the time comes for re-carpeting or sooner.
- The women's restroom caused the most concern. At first the entering seemed easy because all you have to do was just lift your feet and roll down the interior sloped transition (ramp) from the exterior corridor/door and the interior door. Once inside, I found that the accessible stall and toilet seemed to meet requirements and was functional. I've never encountered these circumstances and did not know what was to follow. I estimate the rise of the ramp to be 3 inches and the length at 7-8, but the ramp also does not have a level landing as required for an interior opening door. Every time you take your hand off the wheelchair rim to open the door, you roll backward. The same benign downward slope turned out to be the only time in four years of disability that I felt trapped somewhere and couldn't get out!

I am enclosing a copy of Title 24 figure 118.39, ramp landing and doorway, to further illustrate the requirements. I hope the City Council will be able to remedy the deficiencies quickly because I would like to be able to attend future METRO Board meeting without fear of becoming trapped in the restroom and of having to call 911 for assistance.

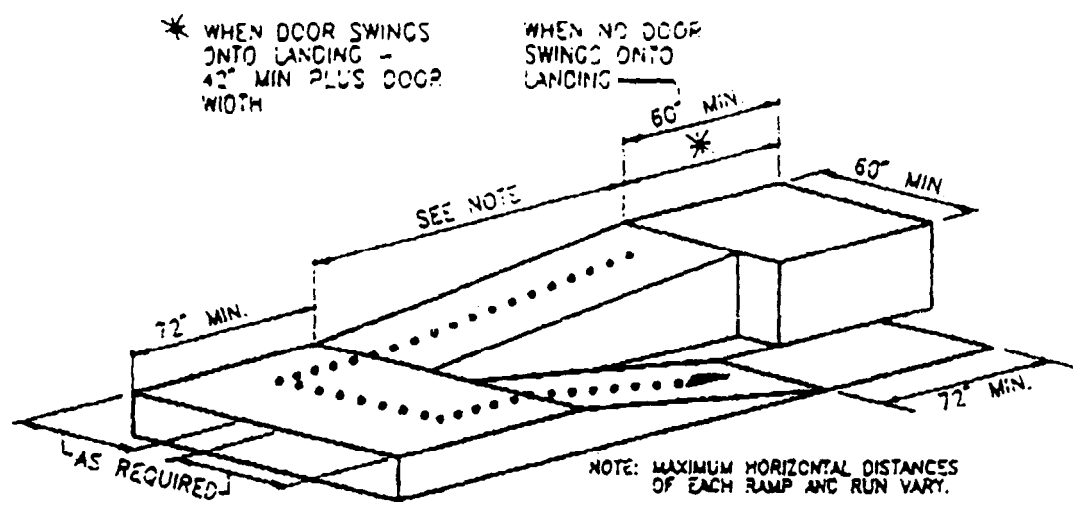
I would appreciate your acknowledgement of receiving this letter and to be kept informed as to when the non-accessible areas and concerns will be remedied.

Sincerely,

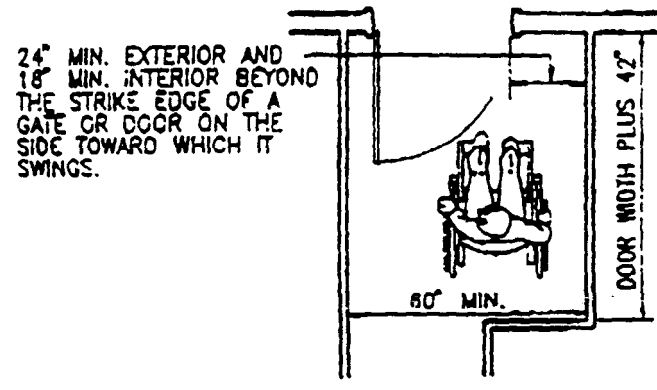
A handwritten signature in black ink that reads "Patricia A. Spence". The signature is written in a cursive style with a large initial "P".

Patricia A. Spence  
720 Oregon Street  
Watsonville, CA 95076  
728-2767

CC: METRO Board of Directors, Les White, General Manager  
MASTF  
Commission on Disabilities



(a) RAMP WITH INTERMEDIATE SWITCH-BACK PLATFORM



(b) RAMP LANDING AT DOORWAY

THESE DIAGRAMS ILLUSTRATE THE SPECIFIC REQUIREMENTS OF THESE REGULATIONS AND ARE INTENDED ONLY AS AN AID FOR BUILDING DESIGN AND CONSTRUCTION.

FIGURE 118-39—RAMP LANDING AND DOORWAY

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**Minutes- Board of Directors**

**February 9, 2001**

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A Regular Meeting of the Board of Directors of the Santa Cruz Metropolitan Transit District met on Friday, February 9, 2001 at the District Administrative Office, 370 Encinal Street, Santa Cruz, CA.

Vice-Chairperson Reilly called the meeting to order at 8:34 a.m.

## **SECTION 1: OPEN SESSION**

### **1. ROLL CALL:**

#### **DIRECTORS PRESENT**

Sheryl Ainsworth  
Bruce Gabriel  
Michelle Hinkle  
Mike Keogh  
Christopher Krohn  
Emily Reilly

#### **DIRECTORS ABSENT**

Jeff Almquist  
Jan Beautz (arrived at 8:47 a.m.)  
Tim Fitzmaurice (arrived at 8:38 a.m.)  
Rafael Lopez  
Dennis Norton  
Ex-Officio Mike Rotkin

#### **STAFF PRESENT**

Bryant Baehr, Operations Manager  
Paul Chandley, Human Resource Manager  
Kim Chin, Planning & Marketing Manager  
John Daugherty, Accessible Svcs. Coord.  
Mark Dorfman, Asst. General Manager  
Marilyn Fenn, Asst. Finance Manager  
Terry Gale, IT Manager

Margaret Gallagher, District Counsel  
David Konno, Facilities Maint. Manager  
Kathy O'Mara, Schedule Analyst  
Elisabeth Ross, Finance Manager  
Judy Souza, Base Superintendent  
Tom Stickel, Fleet Maintenance Manager  
Leslie R. White, General Manager

#### **EMPLOYEES AND MEMBERS OF THE PUBLIC WHO INDICATED THEY WERE PRESENT**

Jim Bosso, S.C. Transportation  
Scott Bugental, E&D TAC  
Mark Hartunian, Food and Nutrition  
Mary Ferrick, Transit Supervisor  
Kasandra Fox, MASTF  
Patti Korba, SEA  
Ian McFadden, UTU  
Gillian McGlaze, PSA  
John Mellon, VMU

Bonnie Morr, UTU  
Carolyn O'Donnell, TMA  
Robert Perrone, Nelson Nygaard  
Liz Sparks, CCCIL  
Sam Storey, Food and Nutrition  
Marion Taylor, League of Women Voters  
Peggy Weaver, SEIU  
Richard Weiner, Nelson Nygaard  
Linda Wilshusen, SCCRTC

**THE FOLLOWING ITEMS WERE TAKEN OUT OF ORDER**

**6. ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS**

Consent Agenda Item #7-14 UCSC Service Status Report was distributed to the Directors. Copies will be included in the Add-On Packet for all other recipients.

A Food and Nutrition Services, Inc. handout was distributed to support Item #13.

**CONSENT AGENDA**

**7-1. APPROVE REGULAR BOARD MEETING MINUTES OF 1/12/01 AND 1/19/01**

Sam Storey asked that the Minutes be corrected to reflect that he is from Food and Nutrition Services rather than Santa Cruz Transportation as stated. The corrected Minutes will be included in the Add-On Packet for approval at the 2/16/01 Board Meeting.

**7-2. ACCEPT AND FILE PRELIMINARILY APPROVED CLAIMS**

No questions or comments.

**7-3. ACCEPT AND FILE PASSENGER LIFT REPORT FOR JANUARY 2001**

No questions or comments.

**7-4. CONSIDERATION OF TORT CLAIMS: None**

No questions or comments.

**7-5. ACCEPT AND FILE MINUTES OF MASTF COMMITTEE MEETING OF 1/18/01**

No questions or comments.

**7-6. ACCEPT AND FILE MINUTES OF MUG COMMITTEE MEETING OF 1/17/01**

No questions or comments.

**7-7. ACCEPT AND FILE MONTHLY BUDGET STATUS REPORT FOR DECEMBER 2000, APPROVAL OF BUDGET TRANSFERS**

Linda Wilshusen of the Transportation Commission stated that her staff is updating the Transportation Development Act (TDA) revenue based on sales tax and was informed that the District would be doing the same with its budget in April. Elisabeth Ross commented that revenues are approximately \$600,000 ahead of schedule due to the sales tax. Sales tax income is 7.2% over budget for the first six months of this fiscal year, which is almost 14% over last year.

**7-8. CONSIDERATION OF AUTHORIZATION FOR DISPOSAL OF ASSETS**

In response to Director Krohn's inquiry, Ms. Ross informed the Board that any assets with a market value are auctioned or sold. Any assets with no value are offered to Ecology Action or a similar organization to be recycled or disposed of at a landfill. Director Krohn asked that the truck driver disposing of these assets inform the person at the landfill gate that these assets may be appropriate for the landfill store. David Konno will make a note of this.

**7-9. CONSIDERATION OF AUTHORIZATION FOR DELETION OF MISSING ASSETS FROM DISTRICT'S RECORDS**

Elisabeth Ross reported that some of these assets go back over twenty years and have never been removed from the District records.

**7-10. CONSIDERATION OF RESOLUTION AUTHORIZING THE SECRETARY/GENERAL MANAGER TO DISPOSE OF EXCESS ASSETS WITH AN ACQUISITION COST OF LESS THAN \$5,000.00**

No questions or comments.

**7-11. CONSIDERATION OF DESIGNATION OF DISTRICT COUNSEL AS ALTERNATE MEMBER OF CALTIP BOARD OF DIRECTORS**

No questions or comments.

**7-12. ACCEPT AND FILE HIGHWAY 17 STATUS REPORT FOR DECEMBER 2000**

No questions or comments.

**7-13. ACCEPT AND FILE STATUS REPORT ON ADA PARATRANSIT PROGRAM FOR DECEMBER 2000**

No questions or comments.

**7-14. ACCEPT AND FILE UNIVERSITY OF CALIFORNIA, SANTA CRUZ SERVICE STATUS REPORT**

This staff report was distributed to the Directors at this meeting. Bryant Baehr reported that the High Street construction should be completed in three weeks. Ridership at the university is up. A recommendation for an increase in UCSC service will be brought to the Board by the Service Review Committee. Les White informed the Board that there would be a meeting with university staff on Monday to discuss the transportation needs of students now being housed at the Holiday Inn. Director Fitzmaurice mentioned that the "press" stated that the university would run a shuttle for this purpose. He asked Mr. White to bring this up during his meeting on Monday.



**7-15. ACCEPT AND FILE RESULTS OF THE WATSONVILLE SHOPPER SHUTTLE**

Bryant Baehr reported that there was a charge of \$.25 this year and ridership dipped by almost half. Mr. White added that "frequent and free" is most effective and that the Board will have to decide if the implementation of this shuttle next year will be worthwhile to the District.

**7-16. CONSIDERATION OF REDUCING PARKING LOT LIGHTING AT SCOTTS VALLEY TRANSIT CENTER**

David Konno reported that he met with the Scotts Valley Police Dept. Several lights will be taken out of the parking lot and the Planning Dept. will conduct a light test to determine if minimum standards are sufficient to satisfy the Police Dept.'s safety requirement.

Director Fitzmaurice requested that Items 8 and 14 be brought to the front of the agenda.

**REGULAR AGENDA**

**8. PRESENTATION AND CONSIDERATION OF RECOMMENDATIONS FROM THE ADA RECERTIFICATION STUDY - NELSON NYGAARD**

**Summary:**

Kim Chin introduced Richard Weiner and Robert Perrone of Nelson Nygaard and stated that after today's presentation, they would go back to the user groups for further input and comments on the Board's direction. Staff will return to the Board in March with a recommendation for action.

**Discussion:**

**Key Issues:**

1. Should eligibility process continue to be limited to paper applications?

**ACTION: MOTION: DIRECTOR BEAUTZ SECOND: DIRECTOR GABRIEL**

**Certification should be in-person assessment.**

**Motion passed unanimously with Directors Almquist, Lopez and Norton absent.**

2. If in-person process, should it be limited to an interview or include actual functional tests?

Mr. Perrone stated that an in-person assessment with a trained analyst would take approximately 30 minutes. The assessment focus would be on the applicant's ability to utilize the accessible service on fixed routes. A guide consisting of interview questions will be prepared by Nelson Nygaard for District staff. Kasandra Fox noted that scooters and electric wheelchairs do not function in the rain and a special classification should be made for people who need the bus in the rain (i.e. conditional eligibility).

Definition of eligibility:

- a) If disability prevents person from getting on or off the bus.
- b) If person can use the bus but the route is inaccessible, temporary eligibility would be given.
- c) If person can use the bus but either he/she cannot get to the stop or lives too far from the bus stop, he/she would be eligible for paratransit service to the bus stop then board the bus.

In response to a query regarding cognitive disabilities, Mr. Perrone stated that the analyst would look at the person's ability to communicate. Also, it would be helpful in some instances to have a relative or friend assist the applicant at the assessment to determine full capabilities.

**ACTION: MOTION: DIRECTOR BEAUTZ SECOND: DIRECTOR AINSWORTH**

**In-person assessment should be based on an interview rather than a full functional assessment although there would be the ability to conduct some type of functional assessment if felt to be necessary by the parties involved. The functional assessment would also be able to be used for appeals.**

**Motion passed unanimously with Directors Almquist, Lopez and Norton absent.**

3. Should current registrants be granted automatic eligibility rather than requiring all registrants to undergo a recertification process?

**ACTION: MOTION: DIRECTOR FITZMAURICE SECOND: DIRECTOR KROHN**

**All registrants should undergo recertification with priority given to most frequent users. Process should be completed within a reasonable period of time.**

It was confirmed that people would be able to use the system until they go through the recertification process. A timeframe will be established as to how long someone would be able to utilize the system until they are certified. This timeframe will be discussed in E/D TAC.

**Motion passed unanimously with Directors Almquist, Lopez and Norton absent.**

4. If in-person process is selected, should all applicants come in for the assessment rather than allowing some to be certified through a paper process?

**ACTION: MOTION: DIRECTOR BEAUTZ SECOND: DIRECTOR GABRIEL**

**All applicants should come in, except small number of hardship cases (criteria to be determined later). The District will provide free transportation to the assessment site.**

**Motion passed unanimously with Directors Almquist, Lopez and Norton absent.**

There was discussion that E/D TAC would discuss what signifies a "hardship" case.

5. Should an in-person process entirely eliminate the need for a paper application?

Director Gabriel commented that the MUG committee is concerned that the District will be asked to pay doctor fees for applicants to obtain a note from their doctor stating the reason for their paratransit eligibility.

**ACTION: MOTION: DIRECTOR GABRIEL SECOND: DIRECTOR BEAUTZ**

**Application form not required. Different process for the small number of hardship cases may involve use of application form or a fax from a health care professional.**

**Motion passed unanimously with Directors Almquist, Lopez and Norton absent.**

Mr. Weiner stated that a new applicant would call to make an appointment for an in-person assessment and the District would arrange for a paratransit ride to assist the applicant in getting to his appointment.

6. Should eligibility continue to be indefinite rather than setting term limits?

**ACTION: MOTION: DIRECTOR FITZMAURICE SECOND: DIRECTOR AINSWORTH**

**Eligibility should be limited to three-year term limits, with simple renewal process in majority of cases. Renewal could be a one-page form indicating no changes in functional ability or residential location that would impact on ADA eligibility status.**

Director Beautz mentioned that there needs to be a written record of each applicant's situation. Paperwork would be generated from the in-person assessment. Director Keogh inquired about annual reviews of eligibility with a caveat that the interviewer can waive the renewal for up to three, or an agreed upon number of times.

**Motion passed with Directors Almquist, Lopez and Norton absent and Director Keogh voting no.**

7. Should Metro continue providing 30-day temporary eligibility certifications?

**ACTION: MOTION: DIRECTOR BEAUTZ SECOND: DIRECTOR GABRIEL**

**Metro will discontinue providing 30-day temporary eligibility certifications in current form. For emergency situations, a waiver of the certification process may be allowed - decision will be made by the eligibility certification coordinator, and may require other supporting documentation.**

Scott Bugental stated that there should be an expeditious recertification process and if no response is given to the applicant after 21 days, the applicant should be assumed to be eligible. Director Fitzmaurice added that the recommendation doesn't support the 30-day temporary certifications and that people should be given temporary eligibility if staff cannot determine true eligibility. Richard Weiner stated that he would ask the various advisory committees to determine what an "emergency" situation would be and this input will be brought back to the

Board. Liz Sparks of CCCIL expressed concern regarding the timelines and was informed by Mr. Weiner that a policy would be established as to the amount of time in which a caller would be offered an interview to determine eligibility.

**Motion passed unanimously with Directors Almquist, Lopez and Norton absent.**

8. Should the process be conducted by Metro staff or contracted out?

Mr. Wiener stated that if Metro staff conducts the assessment, someone with rehabilitation experience would be needed on staff. Robert Perrone added that Nelson Nygaard would give staff information on training the assessment person and on reporting requirements. Director Keogh expressed interest in seeing this function brought in-house in order to maintain a high level of service. Director Beautz suggested that a health services agency be used for the screening and eligibility process. Ian McFadden supports bringing this entire process in-house. The consultants will send a memo to Kim Chin with various models for this process, including a hybrid model consisting of District staff working with outside agencies.

DIRECTORS FITZMAURICE AND KROHN LEFT THE MEETING

Kim Chin reported that the consultants will present their recommendation to the Board in March after receiving more community input.

**ACTION: MOTION: DIRECTOR AINSWORTH SECOND: DIRECTOR GABRIEL**

**Postpone action on Item 14 until the Board meeting of 2/16/01.**

**Motion passed unanimously with Directors Almquist, Fitzmaurice, Krohn, Lopez and Norton absent.**

**VICE-CHAIR REILLY RETURNED TO "ORAL AND WRITTEN COMMUNICATIONS" AT THIS TIME.**

**2. ORAL AND WRITTEN COMMUNICATIONS**

- a. William Brooks RE: MetroBase
- b. UTU RE: ADA Recertification - UTU Recommendations

No comments or questions.

**3. LABOR ORGANIZATION COMMUNICATIONS**

Patti Korba of SEA mentioned the general membership meeting being held next week. She hopes to bring back a recommendation regarding contracting the recertification process out or bringing it in-house.

Ian McFadden of UTU mentioned the Seniors Dinner being held on April 5<sup>th</sup> from 4-6:00 p.m. and invited Board members to attend.

**4. METRO USERS GROUP (MUG) COMMUNICATIONS**

Director Gabriel commented that he and Bryant Baehr met with the Student Union Vice President of Cabrillo College to discuss ridership. This issue will be on Cabrillo's agenda for their meeting next week. Director Gabriel reiterated the four-part MUG Motion which was made at their January meeting regarding the Recertification process.

**5. METRO ACCESSIBLE SERVICES TRANSIT FORUM (MASTF) COMMUNICATIONS**

No questions or comments.

**9. CONSIDERATION OF ACCEPTANCE OF FINANCIAL STATEMENTS AND REPORTS OF INDEPENDENT AUDITOR FOR YEAR-ENDING JUNE 30, 2000.**

**Summary:**

Elisabeth Ross informed the Board that Kim McCormick of Grant Thornton would make her presentation at the Board meeting of 2/16/01.

**10. CONSIDERATION OF SECOND READING AND ADOPTION OF AMENDMENT TO FARE ORDINANCE TO DELETE RESTRICTIONS ON HIGHWAY 17 FOR SENIOR AND DISABLED FARES**

**Summary:**

Bryant Baehr reported that a second reading of the Ordinance is necessary before it can be approved.

**11. CONSIDERATION OF SERVICE IMPROVEMENTS FOR SPRING 2001**

**Summary:**

Bryant Baehr reported that a slide presentation of the proposed improvements would be made at next week's Board meeting. He informed Director Keogh that the source of the \$500,000 funding is TDA funds from the Transportation Commission. Mr. Baehr distributed a letter from the Mission Street Widening Task Force expressing support of the Route 1-Supplemental Service route. This letter will be included in the Add-on Packet for next week's meeting.

**12. CONSIDERATION OF AUTHORIZATION TO OPERATE A SHUTTLE BUS FOR THE UNITED TRANSPORTATION UNION (UTU) SENIOR DINNER**

No comments or questions.

**ITEM 15 WAS TAKEN OUT OF ORDER**

**15. CONSIDERATION OF ACCEPTANCE OF CONDITIONS FROM THE CALIFORNIA AIR RESOURCES BOARD (CARB) FOR IMPLEMENTATION OF THE URBAN BUS REGULATION**

**Summary:**

Les White reported that CARB is giving the District approval for a one-time purchase of buses powered by diesel, convertible to CNG, and still allowing us to stay on the alternative fuel path. After that one-time purchase, all acquisitions will need to be CNG. Under this CARB decision, the District is unable to utilize the \$3.5M in funds requested by Congressman Farr for additional buses. Mr. White asked that the Board consider withdrawing the request for this funding. Mark Dorfman added that the one-time bus purchase would take place within the next few months.

**13. CONSIDERATION OF APPROVAL OF A CONTRACT EXTENSION WITH FOOD AND NUTRITION SERVICES FOR PARATRANSIT SERVICES INCLUDING A 4% COST-OF-LIVING INCREASE, MODIFICATION OF THE PERCENTAGE OF TAXI RIDES OUT OF THE TOTAL PARATRANSIT RIDES AND OTHER MODIFICATIONS**

**Summary:**

Margaret Gallagher reported that there is still outstanding language that is being negotiated.

**14. CONSIDERATION OF SUBMITTING COMMENTS TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION ON THE REGIONAL TRANSPORTATION PLAN "ACTION ELEMENT" LIST OF PROJECTS**

Action postponed until next week's Board meeting.

**16. CONSIDERATION OF AGREEMENT WITH SANTA CRUZ SEASIDE COMPANY FOR PROVISION OF LATE NIGHT SERVICE**

No questions or comments.

**SECTION II: CLOSED SESSION**

Vice-Chairperson Reilly adjourned to Closed Session at 11:04 a.m. and reconvened to Open Session at 11:25 a.m.

**SECTION III: RECONVENE TO OPEN SESSION**

**REPORT OF CLOSED SESSION**

**DIRECTORS PRESENT**

Sheryl Ainsworth  
Jan Beautz  
Bruce Gabriel  
Michelle Hinkle  
Mike Keogh  
Emily Reilly

**DIRECTORS ABSENT**

Jeff Almquist  
Tim Fitzmaurice  
Christopher Krohn  
Rafael Lopez  
Dennis Norton  
Ex Officio Mike Rotkin

**STAFF PRESENT**

Bryant Baehr, Operations Manager  
Paul Chandley, Human Resource Manager  
Mark Dorfman, Asst. General Manager  
Margaret Gallagher, District Counsel  
Tom Stickel, Fleet Maintenance Manager  
Les White, General Manager

**1. REPORT OF CLOSED SESSION**

Margaret Gallagher stated that there was nothing to report from the Closed Session at this time.

**ADJOURN**

There being no further business, Vice-Chairperson Reilly adjourned the meeting at 11:26 a.m.

Respectfully submitted,

DALE CARR  
Administrative Services Coordinator

**NOTICE TO PUBLIC**

Members of the public may address the Board of Directors on a topic not on the agenda but within the jurisdiction of the Board of Directors or on the consent agenda by approaching the Board during consideration of Agenda Item #1 "Oral and Written Communications", under Section I. Presentations will be limited in time in accordance with District Resolution 69-2-1.

Members of the public may address the Board of Directors on a topic on the agenda by approaching the Board immediately after presentation of the staff report but before the Board of

Directors' deliberation on the topic to be addressed. Presentations will be limited in time in accordance with District Resolution 69-2-1. When addressing the Board, the individual may, but is not required to, provide his/her name and address in an audible tone for the record.

The Santa Cruz Metropolitan Transit District does not discriminate on the basis of disability. The Encinal Conference Room is located in an accessible facility. If you wish to attend this meeting and require special assistance in order to participate, please contact Dale Carr at 426-6080 at least 72 hours in advance of the Board of Directors meeting.



# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Minutes- Board of Directors

February 16, 2001

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A Regular Meeting of the Board of Directors of the Santa Cruz Metropolitan Transit District met on Friday, February 16, 2001 at the City Hall Council Chambers, 809 Center Street, Santa Cruz, California.

Vice-Chair Reilly called the meeting to order at 8:37 a.m.

## **SECTION 1: OPEN SESSION**

### **1. ROLL CALL:**

#### **DIRECTORS PRESENT**

Jeff Almquist  
Jan Beautz  
Tim Fitzmaurice  
Bruce Gabriel  
Michelle Hinkle  
Mike Keogh  
Christopher Krohn  
Dennis Norton  
Emily Reilly

#### **DIRECTORS ABSENT**

Sheryl Ainsworth  
Rafael Lopez  
Ex-Officio Mike Rotkin

#### **STAFF PRESENT**

Bryant Baehr, Operations Manager	Mark Dorfman, Asst. General Manager
Paul Chandley, Human Resource Manager	Margaret Gallagher, District Counsel
	Leslie R. White, General Manager

### **2. REVIEW OF ITEMS TO BE DISCUSSED IN CLOSED SESSION:**

Margaret Gallagher reported that there was to be a conference with Labor Negotiators, however, Peggy Weaver of SEIU has been unable to meet due to illness. This item was removed from the Agenda. Ms. Gallagher added that there would be a conference with legal counsel regarding anticipated litigation.

### **3. ORAL AND WRITTEN COMMUNICATION REGARDING CLOSED SESSION**

None

## **SECTION II: CLOSED SESSION**

Vice-Chairperson Reilly adjourned to Closed Session at 8:38 a.m. and reconvened to Open Session at 9:42 a.m.

### **SECTION III: RECONVENE TO OPEN SESSION**

#### **STAFF PRESENT**

Bryant Baehr, Operations Manager  
Paul Chandley, Human Resource Manager  
Kim Chin, Planning & Marketing Manager  
Mark Dorfman, Asst. General Manager  
Marilyn Fenn, Asst. Finance Manager  
Terry Gale, IT Manager  
Margaret Gallagher, District Counsel

Mike Goodell, Sr. Database Administrator  
David Konno, Facilities Maint. Manager  
Kathy O'Mara, Schedule Analyst  
Elisabeth Ross, Finance Manager  
Judy Souza, Base Superintendent  
Tom Stickel, Fleet Maintenance Manager  
Leslie R. White, General Manager

#### **EMPLOYEES AND MEMBERS OF THE PUBLIC WHO INDICATED THEY WERE PRESENT**

Sharon Barbour, MUG  
Jim Bosso, S. C. Transportation  
Scott Bugental, E&D TAC  
Richard Camperud, Courtesy Cab  
Mary Ferrick, Transit Supervisor  
Kasandra Fox, MASTF  
Mark Hartunian, Food & Nutrition Services  
Patti Korba, SEA

Jeff LeBlanc, Bus Rider  
Manny Martinez, PSA  
Ian McFadden, UTU  
John Mellon, VMU  
Bonnie Morr, UTU  
Carolyn O'Donnell, TMA  
Sam Storey, Food and Nutrition Services  
Candace Ward, UCSC

#### **1. REPORT OF CLOSED SESSION**

Margaret Gallagher reported that the Conference with Labor Negotiator had been deleted from the agenda due to one of the parties being ill and unable to meet with the District negotiators.

The issue of Anticipated Litigation was discussed and it was determined not to litigate at this time, however, this is contingent upon whether certain issues are resolved.

#### **2. ORAL AND WRITTEN COMMUNICATIONS**

##### Written:

- |    |                |   |
|----|----------------|---|
| a. | William Brooks | RE: MetroBase                                 |
| b. | UTU            | RE: ADA Recertification - UTU Recommendations |
| c. | Veronica Elsea | RE: Mission Street Widening Task Force        |

##### Oral:

Scott Bugental, Chair of the Elderly/Disabled Transit Advisory Committee (E/D TAC), relayed to the Board comments made at the recent E/D TAC meeting regarding the recertification process. He also expressed surprise at the elimination of the coupons. Director Beautz stated that it was her understanding that the Board voted years ago not to authorize the issuance of coupons. Mark

Dorfman confirmed that no authorization was given to Lift Line to issue coupons. However, at least one agency stated that they are buying several hundred dollars of coupons every 3 weeks. Staff requested that all coupons be honored for the next thirty days to minimize the impact on users. The remainder of this discussion will be heard under Item #13.

Liz Sparks of CCCIL requested discussion from the Board on the issue of prepaid tickets.

**3. LABOR ORGANIZATION COMMUNICATIONS**

None

**4. METRO USERS GROUP (MUG) COMMUNICATIONS**

Sharon Barbour read the following Motions that were made at the recent MUG meeting:

- a) Support the Nelson/Nygaard Consultants recommendations #1 through 8 of the ADA Paratransit Certification Project.
- b) Support the Service Review Committee's proposed service improvements for Spring 2001.

Ms. Barbour reiterated the Motion from last November wherein MUG directed staff to move forward on purchasing new buses in a proactive manner.

**5. METRO ACCESSIBLE SERVICES TRANSIT FORUM (MASTF) COMMUNICATIONS**

Kasandra Fox, Chair of MASTF, read resolutions made at the recent MASTF meeting:

- a) MASTF approves of the eight recommendations from the Recertification Consultants.
- b) MASTF approves of the proposed bus improvement changes.
- c) Amend the MASTF constitution to appoint a new person to their Board who will be the ADA representative.

Ms. Fox added that MASTF supports the continuing sales of green, prepaid paratransit ride coupons until a permanent alternative can be devised. MASTF recommends that Metro avoid making drastic changes to the present methods until the audit recertification is completed and changes have been approved by the Santa Cruz Board.

Ms. Fox distributed a petition from the Stroke Center in support of green coupons.

**6. ADDITIONAL DOCUMENTATION TO SUPPORT EXISTING AGENDA ITEMS**

**SECTION III**

**ORAL AND WRITTEN COMMUNICATIONS:**

**ADD TO ITEM #2**                      Written Communication from Veronica Elsea  
RE: Mission Street Widening Task Force

**CONSENT AGENDA:**

**ADD TO ITEM #7-1**                      REGULAR BOARD MEETING MINUTES OF 1/12/01 AND  
1/19/01  
(Add Revised Page 1 of 1/12/01 Minutes  
Add Revised Pages 2 and 13 of 1/19/01 Minutes)

**ADD TO ITEM #7-14**                      ACCEPT AND FILE UNIVERSITY OF CALIFORNIA, SANTA  
CRUZ SERVICE STATUS REPORT  
(Add Staff Report)

**REGULAR AGENDA:**

**DELETE ITEM #8**                      PRESENTATION AND CONSIDERATION OF  
RECOMMENDATIONS FROM THE ADA  
RECERTIFICATION STUDY - NELSON NYGAARD  
(Action taken at 2/9/01 Board Meeting)

**ADD TO ITEM #17**                      CONSIDERATION OF APPROVING THE TRANSFER OF  
THE LEASE AGREEMENT WITH FILIBERTO PORRAS,  
D.B.A. LA MISSION RESTAURANT, TO MATISSE  
SELMAN, D.B.A. "SUSHI NOW", FOR THE KIOSK SPACE  
AT THE SANTA CRUZ METRO CENTER, EFFECTIVE  
MARCH 1, 2001 AND AUTHORIZE THE GENERAL  
MANAGER TO EXECUTE A LEASE AMENDMENT  
INCLUDING MODIFICATION OF THE RENT AND OTHER  
TERMS, THEREAFTER  
(Add Staff Report)

**ADD TO ITEM #18**                      CONSIDERATION OF AUTHORIZATION FOR TENANT  
FILIBERTO PORRAS TO SUBLEASE SANTA CRUZ  
METRO CENTER RESTAURANT SPACE  
(Staff Report to be Distributed at 2/16/01 Board Meeting)

Item #18 was deleted from the Agenda.

## CONSENT AGENDA

- 7-1. APPROVE REGULAR BOARD MEETING MINUTES OF 1/12/01 AND 1/19/01
- 7-2. ACCEPT AND FILE PRELIMINARILY APPROVED CLAIMS
- 7-3. ACCEPT AND FILE PASSENGER LIFT REPORT FOR JANUARY 2001
- 7-4. CONSIDERATION OF TORT CLAIMS: None
- 7-5. ACCEPT AND FILE MINUTES OF MASTF COMMITTEE MEETING OF 1/18/01
- 7-6. ACCEPT AND FILE MINUTES OF MUG COMMITTEE MEETING OF 1/17/01
- 7-7. ACCEPT AND FILE MONTHLY BUDGET STATUS REPORT FOR DECEMBER 2000, APPROVAL OF BUDGET TRANSFERS
- 7-8. CONSIDERATION OF AUTHORIZATION FOR DISPOSAL OF ASSETS
- 7-9. CONSIDERATION OF AUTHORIZATION FOR DELETION OF MISSING ASSETS FROM DISTRICT'S RECORDS
- 7-10. CONSIDERATION OF RESOLUTION AUTHORIZING THE SECRETARY/GENERAL MANAGER TO DISPOSE OF EXCESS ASSETS WITH AN ACQUISITION COST OF LESS THAN \$5,000.00
- 7-11. CONSIDERATION OF DESIGNATION OF DISTRICT COUNSEL AS ALTERNATE MEMBER OF CALTIP BOARD OF DIRECTORS
- 7-12. ACCEPT AND FILE HIGHWAY 17 STATUS REPORT FOR DECEMBER 2000
- 7-13. ACCEPT AND FILE STATUS REPORT ON ADA PARATRANSIT PROGRAM FOR DECEMBER 2000
- 7-14. ACCEPT AND FILE UNIVERSITY OF CALIFORNIA, SANTA CRUZ SERVICE STATUS REPORT
- 7-15. ACCEPT AND FILE RESULTS OF THE WATSONVILLE SHOPPER SHUTTLE
- 7-16. CONSIDERATION OF REDUCING PARKING LOT LIGHTING AT SCOTTS VALLEY TRANSIT CENTER

**ACTION: MOTION: DIRECTOR BEAUTZ SECOND: DIRECTOR ALMQUIST**

**Approve Consent Agenda**

**Motion passed unanimously with Directors Ainsworth and Lopez absent.**

## REGULAR AGENDA

8. DELETED
9. CONSIDERATION OF ACCEPTANCE OF FINANCIAL STATEMENTS AND REPORTS OF INDEPENDENT AUDITOR FOR YEAR-ENDING JUNE 30, 2000.

### Summary:

Elisabeth Ross introduced Kim McCormick of Grant Thornton who gave a brief presentation on the audited financial statements for June 30, 2000. Ms. McCormick informed the Board that her firm conducted an audit of the District as well as an audit of

the financial statements. During their review of the District's internal controls, Grant Thornton also audited the federal awards and looked at compliance of regulations associated with the federal funds. There is also an inventory taken of fixed assets every three years. This process has been completed. Ms. McCormick stated that the audit went very well.

**Discussion:**

Director Fitzmaurice inquired as to why the Workers' Compensation Liability is exactly the same amount as last year and was informed that this figure is a combination of claims actually incurred and reported as well as claims incurred but not yet reported to the carrier. Estimates need to be made every three years. For the three-year period, the figures will remain the same. This figure is an actuarial number. The same situation applies to the Damage and Health Claims. This is a reserve against a balance that the District has to pay.

Director Keogh inquired about the Net Pension Obligation under the Pension Plan category and was informed that due to the success of PERS investments, the pension plan is overfunded. PERS recommended that the District makes no contribution and this resulted in the "\$0" figure shown.

Documentation concerning security for computer network systems will be forwarded to the District's IT Manager and a report will be brought back to the Board. Director Almquist attributed the "clean audit" to the good work by Ms. Ross and her staff.

**ACTION: MOTION: DIRECTOR ALMQUIST SECOND: DIRECTOR BEAUTZ**

**Accept the audited financial statements and reports prepared by the firm of Grant Thornton LLP for the year ending June 30, 2000.**

**Motion passed unanimously with Directors Ainsworth and Lopez absent.**

**10. CONSIDERATION OF SECOND READING AND ADOPTION OF AMENDMENT TO FARE ORDINANCE TO DELETE RESTRICTIONS ON HIGHWAY 17 FOR SENIOR AND DISABLED FARES**

**Summary:**

Bryant Baehr reported that this is the final stage in removing the time restriction on the reduced fare on Highway 17. Currently, the reduced fare is only available to seniors and the disabled from 9:30 a.m. to 2:30 p.m. The Board voted to remove this restriction at their December meeting.

**ACTION: MOTION: DIRECTOR ALMQUIST SECOND: DIRECTOR BEAUTZ**

**Amend the District Fare Ordinance by deleting the time restriction on the senior/disabled fare on Highway 17 service.**

**Motion passed unanimously with Directors Ainsworth and Lopez absent.**

**11. CONSIDERATION OF SERVICE IMPROVEMENTS FOR SPRING 2001  
PUBLIC HEARING TO BE HELD AT 9:00 A.M.**

**Summary:**

Mr. Baehr and the Service Review Committee worked together to propose \$522,140.00 worth of improvements for the Spring of 2001. UTU pushed back the bidding process by two weeks in order to facilitate these changes.

Mary Ferrick, Ian McFadden, Kathy O'Mara and Bryant Baehr presented slides showing changes/improvements to the service routes. Highlights of this discussion were: five stops were added on Western Drive after approval by the Transportation Commission, Delaware route does not include a stop at Long's Marine Lab, additional hours of supplemental (OATIE - Operations Action Team) Service has been added to the university, Westside routes will be published in the *Headways*. Bryant Baehr highlighted the proposed changes to the Highway 17 service. Letters of support for the service improvements were received from the Mission Street Widening Task Force and from Cabrillo College.

**Discussion:**

Discussions will take place between District staff and Mall representatives regarding utilization of the Capitola Mall for a park and ride facility. Mr. White suggested calling on Director Norton and other members of the Capitola City Council for assistance in this regard. Mr. White noted that the \$500,000 in funding for these improvements was from the additional TDA funds.

**The Public Hearing was opened for input at 10:30 a.m.**

Carolyn O'Donnell of the Santa Cruz Transportation Management Association stated that the TMA is working with Cabrillo College in developing a transportation demand management plan. This plan is expected to be adopted in June by the Cabrillo College Board of Trustees. TMA and Cabrillo are also working on a viable bus pass program.

Jeff LeBlanc thanked the Board and staff for the new service on Route #71, which currently is standing room only in the afternoons.

Candace Ward of UCSC stated that the university is very pleased to be included in the service improvement packet. Ms. Ward expressed her thanks to District Staff for an excellent presentation.

**There being no further public input, the Public Hearing was closed at 10:36 a.m.**

**ACTION: MOTION: DIRECTOR FITZMAURICE  
SECOND: DIRECTOR GABRIEL**

**Approve the service enhancements proposed by Staff to be effective March 29, 2001.**

**Motion passed unanimously with Directors Ainsworth and Lopez absent.**

**12. CONSIDERATION OF AUTHORIZATION TO OPERATE A SHUTTLE BUS FOR THE UNITED TRANSPORTATION UNION (UTU) SENIOR DINNER**

**Summary:**

Staff is requesting Board approval to operate a shuttle for the UTU Senior dinner held on April 5, 2001, from 4:00 to 6:00 p.m. Estimated cost of this shuttle is \$171.00.

**Discussion:**

**ACTION: MOTION: DIRECTOR ALMQUIST  
SECOND: DIRECTOR FITZMAURICE**

**Approve operation of shuttle for the UTU Senior dinner held on April 5, 2001.**

Ian McFadden invited all Board members to participate at this function. Kasandra Fox urged the Board to approve this shuttle.

**Motion passed unanimously with Directors Ainsworth and Lopez absent.**

**13. CONSIDERATION OF APPROVAL OF A CONTRACT EXTENSION WITH FOOD AND NUTRITION SERVICES FOR PARATRANSIT SERVICES INCLUDING A 4% COST-OF-LIVING INCREASE, MODIFICATION OF THE PERCENTAGE OF TAXI RIDES OUT OF THE TOTAL PARATRANSIT RIDES AND OTHER MODIFICATIONS**

**Summary:**

Margaret Gallagher stated that the Food and Nutrition Services (FNS) contract was for a three-year period beginning on January 1, 1998, and expiring on December 31, 2000. For the last two months the contract was extended by the Board for 30 days each in order to work out the details of the contract and billing issues. Ms. Gallagher added



that FNS had voluntarily submitted the Paratransit Services Monthly Compliance Certificate so the District could provide the Federal Transit Agency with certification assurances. FNS has agreed to the language specified in Exhibit C of the staff report which denotes specific changes to the paratransit program that was recommended through the audit. Modifications to the Amendment were distributed to the Board.

Mark Dorfman has been working with Mark Hartunian regarding the 70/30 split of ADA rides between FNS and their sub-contractors. There is language in the agreement that will allow for modification of that split at a later date. District staff has been working with FNS to resolve the issues of green coupons and travelling outside of the service area. Currently, FNS is working with riders outside the service area by charging them for the ride to CTSA, then once inside the service area, it is considered an ADA ride and billed to the District. Margaret Gallagher will review the regulations regarding rides outside the service area and other issues and will make a Board presentation regarding the paratransit program in March.

**Discussion:**

Direction Gabriel inquired about those people who have been on a 30-day temporary certification for an extended period. Ms. Gallagher stated that FNS has been asked to inform these people that they would have to be certified or the rides will not be allowed. FNS has until March 7<sup>th</sup>, 2001, to accomplish this. Director Almquist asked that when any of these "extended" people call for a ride, that a notation be made in the log that the person has been notified of the recertification requirement.

Director Almquist further requested that FNS be required to separate the District's financial contribution from all other agencies, such as MediCal. He inquired as to why FNS would be granted an additional 4% and Mark Dorfman noted that FNS is being asked for a breakdown of the current rate of \$15.30 plus overhead. Director Norton requested a detailed breakdown in the form of a Cost Benefit Analysis. Mark Hartunian stated that the records showing where the District funds go to support the program can be provided.

Sam Storey reviewed the increased costs, such as fuel, and the living wage, to show why the 4% increase is needed. He further added that since its inception, CTSA has had a coupon program. He stated that it appeared in the contract that this program would be at the discretion of FNS. At Mr. Storey's request, a letter with clear directives and guidelines was submitted to him from the District at the end of January. This letter instructed FNS staff to cease providing coupons until the recertification process could be reviewed. Coupons had been terminated for the ADA program at that point. Mr. Storey stated that FNS is satisfied with the language in the contract and that he fully intends to cooperate with the Board and District staff to resolve the issue regarding MediCal.

On the issue of utilizing TDA funds to subsidize ADA rides, Director Keogh was informed that the total billed amount to the District last year was \$2,055,000 vs. CTSA

expenditures in the amount of \$2,372,000. Approximately \$500,000 was moved from another funding source to the ADA side of the ledger. FNS staff requested several months be granted for data collection to present funding breakdown and usage to the Board.

**ACTION: MOTION: DIRECTOR BEAUTZ SECOND: DIRECTOR ALMQUIST**

**Extend the Paratransit Contract with Food and Nutrition Services through December 31, 2001 with a CPI adjustment of 4% and a reopener clause regarding the implementation of any District-approved recommendations from the Auditors, the potential increase in costs as a result of collective bargaining by Food and Nutrition and/or the modification of the taxi percentage of total paratransit rides, including a monthly certification statement and implementation of certain tasks recommended by the ADA paratransit consultants as more particularly set forth in the attached Amendment.**

**By March 15, 2001, FNS shall provide the District with a complete breakdown of all sources of transportation revenues and all transportation expenses for the most recent complete year for which they have financial information.**

**Additionally, that there be a continuation of the 30-day program through March 7<sup>th</sup>. After March 7<sup>th</sup>, the District will no longer accept green or other coupons unless it is a coupon issued or authorized explicitly by the Transit District. Any coupon not used at the point at which the District has terminated its agreement should be reimbursed.**

**All in favor with Directors Ainsworth and Lopez absent.**

**ITEMS 15 THROUGH 17 WERE TAKEN OUT OF ORDER FOR THE PURPOSE OF APPROVAL.**

**ACTION: MOTION: DIRECTOR FITZMAURICE  
SECOND: DIRECTOR ALMQUIST**

**Approve Items 15 through 17**

**15. CONSIDERATION OF ACCEPTANCE OF CONDITIONS FROM THE CALIFORNIA AIR RESOURCES BOARD (CARB) FOR IMPLEMENTATION OF THE URBAN BUS REGULATION**

**Summary:**

**DIRECTOR REILLY LEFT THE MEETING**

Les White asked the Board to withdraw the \$3.5M earmark request for bus acquisitions since we cannot buy these buses. He added that if the request were not withdrawn, it would probably be withdrawn for us.

**ACTION: AMENDMENT TO MOTION:**

**Authorize approval to withdraw earmarked funds as stipulated in Item 15.**

**Motion passed unanimously with Directors Ainsworth, Lopez and Reilly absent.**

**DIRECTOR REILLY RETURNED TO THE MEETING**

16. **CONSIDERATION OF AGREEMENT WITH SANTA CRUZ SEASIDE COMPANY FOR PROVISION OF LATE NIGHT SERVICE**
17. **CONSIDERATION OF APPROVING THE TRANSFER OF THE LEASE AGREEMENT WITH FILIBERTO PORRAS, D.B.A. LA MISSION RESTAURANT, TO MATISSE SELMAN, D.B.A. "SUSHI NOW", FOR THE KIOSK SPACE AT THE SANTA CRUZ METRO CENTER, EFFECTIVE MARCH 1, 2001 AND AUTHORIZE THE GENERAL MANAGER TO EXECUTE A LEASE AMENDMENT INCLUDING MODIFICATION OF THE RENT AND OTHER TERMS, THEREAFTER**
14. **CONSIDERATION OF SUBMITTING COMMENTS TO THE SANTA CRUZ COUNTY REGIONAL TRANSPORTATION COMMISSION ON THE REGIONAL TRANSPORTATION PLAN "ACTION ELEMENT" LIST OF PROJECTS**

**Discussion:**

From the "Likely Constrained" list attached to the staff report, Director Beautz requested that the bike rack at the Capitola Mall be added back onto the Constrained List. She further requested that an alternate fleet of smaller buses **not** be deleted since this is documentation for the next thirty years. Director Keogh asked that more park and ride lots be added throughout the County. Add the re-power conversion to the constrained list.

**DIRECTOR KROHN LEFT THE MEETING**

**ACTION: MOTION: DIRECTOR FITZMAURICE  
SECOND: DIRECTOR KEOGH**

**Authorize staff to submit comments to the SCCRTC on the likely list of projects for the Regional Transportation Plan Action Element.**

**Motion passed unanimously with Directors Ainsworth, Krohn and Lopez absent.**

**18. DELETED**

**ADJOURN**

There being no further business, Vice-Chair Reilly adjourned the meeting at 12:20 p.m.

Respectfully submitted,

DALE CARR  
Administrative Services Coordinator

**NOTICE TO PUBLIC**

Members of the public may address the Board of Directors on a topic not on the agenda but within the jurisdiction of the Board of Directors or on the consent agenda by approaching the podium during consideration of Agenda Item #1 "Oral and Written Communications", under Section I. Presentations will be limited in time in accordance with District Resolution 69-2-1.

Members of the public may address the Board of Directors on a topic on the agenda by approaching the podium immediately after presentation of the staff report but before the Board of Directors' deliberation on the topic to be addressed. Presentations will be limited in time in accordance with District Resolution 69-2-1. When addressing the Board, the individual may, but is not required to, provide his/her name and address in an audible tone for the record.

The Santa Cruz Metropolitan Transit District does not discriminate on the basis of disability. The Santa Cruz City Council Chambers is located in an accessible facility. If you wish to attend this meeting and require special assistance in order to participate, please contact Dale Carr at 426-6080 at least 72 hours in advance of the Board of Directors meeting.

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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DATE: 02/01/01 THRU 02/28/01

CHECK NUMBER	CHECK DATE	CHECK AMOUNT	VENDOR NAME	VENDOR TYPE	TRANS. NUMBER	TRANSACTION DESCRIPTION	TRANSACTION AMOUNT	COMMENT
2177	02/01/01	-80.00	E521 HERNANDEZ, JAIME VOID CHECK		72510	VOID CHECK	-80.00	PRE-PAID
2669	02/02/01	129,554.72	001762 FOOD & NUTRITION SERVICES, INC		72354	NOV ADA PARATRANSIT	129,554.72	
2670	02/02/01	181.98	002203 SAN FRANCISCO MARRIOTT		72355	HOTEL-FTA SEMINAR	181.98	
2671	02/02/01	3,286.80	057 U.S. BANK		72356	4251-2400-0554-7229	3,286.80	
2672	02/02/01	788,307.72	647 GFI GENFARE		72357	95% CONTRACT-FAREBOX	788,307.72	
2673	02/02/01	588.95	E030 FENN, MARILYN		72358	TRAVEL/TRAINING EXP.	588.95	
2674	02/02/01	80.00	E103 LONGNECKER, LLOYD		72359	FTA SEMINAR 2/6-7	80.00	
2675	02/09/01	9,173.28	001043 VISION SERVICE PLAN		72446	FEB VISION INS.	9,173.28	
2676	02/09/01	3,867.12	001063 NEW FLYER INDUSTRIES LIMITED		72360	REV VEH PARTS 1197	1,196.91	
					72361	REV VEH PARTS 425	424.86	
					72362	REV VEHICLES 862	861.88	
					72363	REV VEH PARTS 1383	1,383.47	
2677	02/09/01	63,429.37	001316 DEVCO OIL		72447	JANUARY FUEL-FLEET	63,429.37	
2678	02/09/01	468.00	001346 CITY OF SANTA CRUZ		72364	6 PARKING - APR-JUNE	468.00	
2679	02/09/01	291.33	001358 MARINA MOTOR COMPANY		72365	REPAIR VEH #9601	291.33	
2680	02/09/01	275.00	001492 EVERGREEN		72366	WASTE DISPOSAL	275.00	
2681	02/09/01	31,759.61	001616 UNUM		72448	FEB LTD INSURANCE	31,759.61	
2682	02/09/01	260.92	001711 MOHAWK MFG. & SUPPLY CO.		72367	REV VEH PARTS 261	260.92	
2683	02/09/01	67.45	001737 UNITED STATES PLASTIC CORP.		72368	FOLD UP PLATFORM-ADM	67.45	
2684	02/09/01	4,290.25	001745 ITT HARTFORD		72449	FEB LIF INSURANCE	4,290.25	
2685	02/09/01	7,363.09	001991 BAY STAFFING		72450	TEMPS W/E 1/21	910.00	
					72451	TEMPS W/E 1/14	1,043.00	
					72452	TEMPS W/E 12/31	456.75	
					72453	TEMPS W/E 12/24	1,067.50	
					72454	TEMPS W/E 1/7	644.00	
					72455	TEMPS W/E 1/7/01	558.60	
					72456	TEMPS W/E 1/14/01	764.40	
					72457	TEMPS W/E 12/17	560.00	
					72458	TEMPS W/E 12/10/00	1,179.50	
						DISCOUNT TAKEN	-2.95	
					72459	TEMPS W/E 12/17/00	178.50	
					72460	TEMPS W/E 12/31/00	3.79	
2686	02/09/01	37.00	001992 LRP PUBLICATIONS		72492	PAMPHLET- ADA- LEGAL	37.00	
2687	02/09/01	1,263.92	002021 HALL KINION		72369	TEMPS W/E 1-7 LEGAL	1,263.92	
2688	02/09/01	145.69	002063 COSTCO		72370	COFFEE SUPPLIES	123.87	
					72371	PHOTO PROCESS- OPS	21.82	
2689	02/09/01	898.80	002069 A TOOL SHED, INC.		72372	EQUIPT RENTAL	898.80	
2690	02/09/01	162.50	002084 BIG SUR BOTTLED WATER, INC		72373	WATER - PLANNING	65.50	
					72461	DEC/JAN WATER ADMIN	97.00	
2691	02/09/01	30.00	002140 PTC/NC		72462	ANNUAL MEMBERSHIP	30.00	
2692	02/09/01	169.00	002149 PADGETT-THOMPSON		72463	SUPERVISOR TRAINING	169.00	
2693	02/09/01	3,229.88	002192 BAY EQUIPMENT & REPAIR		72374	JOINT REPAIR OTHER VEH	3,229.88	
2694	02/09/01	55.00	002224 DOCTORS ON DUTY		72375	DMV EXAM-ALAN BOES	55.00	
2695	02/09/01	5,899.45	002287 CALIFORNIA SERVICE EMPLOYEE		72464	FEB MEDICAL INS	5,899.45	
2696	02/09/01	134.69	002380 MOBILE STORAGE GROUP, INC.		72465	STORAGE CONTAINER	134.69	
2697	02/09/01	72.50	002386 DOGHERRA'S		72377	OUT REPAIR OTHER VEH	72.50	
2698	02/09/01	38.46	002514 APEX WELDING SUPPLIES, INC.		72378	REPAIRS/MAINT- FAC	38.46	
2699	02/09/01	2,091.90	002610 FREDERICK ELECTRONICS CORP.		72379	RENT INCREASE	2,091.90	
2700	02/09/01	332.07	002627 CDW GOVERNMENT, INC.		72380	OFFICE SUPPLIES-MIS	332.07	

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2701	02/09/01	528.35	002662	NETWORK ASSOCIATES, INC.	72381	VIRUS DEFENSE SUPPRT	528.35
2702	02/09/01	14,361.23	002672	USL FINANCIALS	72466	INSTALL SOFTWARE	14,361.23
2703	02/09/01	150.00	002683	TRUCK-TRAILER-TRANSIT	72382	REV VEH PARTS 150	150.00
2704	02/09/01	6,416.12	002686	WATERLEAF ARCHITECTURE	72383	PROF SVCS TO 12/29	6,416.12
2705	02/09/01	1,875.00	002700	SANTA CRUZ COUNTY	72493	HEALTH PERMIT-GOLF	1,169.00
					72494	HEALTH PERMIT ENCINA	214.00
					72495	HEALTH PERMIT-RIVER	492.00
2706	02/09/01	444.76	002713	SANTA CRUZ AUTO TECH, INC	72384	REPAIR VEH #9601	381.68
					72491	REPAIR VEH #8029	63.08
2707	02/09/01	618.03	004	NORTH BAY FORD LINC-MERCURY	72385	REV VEH PARTS	618.03
2708	02/09/01	9,513.15	009	PACIFIC GAS & ELECTRIC	72467	12/27-1/26 SAKATA	74.55
					72468	12/30-1/31 BEACH ST	93.08
					72469	12/30-1/31 RODRIGUEZ	977.85
					72470	1/3-1/31 111 DUBOIS	526.76
					72471	1/3-1/31 111 DUBOIS	4,322.71
					72472	1/3-1/31 ENCINAL	1,440.59
					72473	12/30-1/31 RODRIGUEZ	570.51
					72474	1/3-1/31 ENCINAL	1,496.60
					72475	12/27-1/26 SAKATA	10.50
2709	02/09/01	3,530.02	013	MCI SERVICE PARTS, INC.	72386	REV VEH PARTS	2,315.63
					72387	REV VEH PARTS	397.06
					72388	REV VEH PARTS	90.22
					72389	REV VEH PARTS	60.05
					72390	REV VEH PARTS	606.72
					72391	REV VEH PARTS	60.34
2710	02/09/01	5,562.45	018	SALINAS VALLEY FORD SALES	72507	REV VEH PARTS/SUPPLY	5,492.73
					72509	SAFETY SUPPLIES	69.72
2711	02/09/01	306.81	020	ADT SECURITY SYSTEMS ,	72392	FEB ALARMS MDF	87.54
					72393	FEB ALARMS MMF	48.29
					72394	FEB ALARMS OPS	40.33
					72395	FEB ALARMS SVTC	27.83
					72396	FEB ALARMS METRO	42.00
					72397	FEB ALARMS WTC	30.41
					72398	FEB ALARMS DUBOIS	30.41
2712	02/09/01	3,101.67	023	PACIFIC TRUCK PARTS, INC.	72399	REV VEH PARTS	1,947.78
					72508	REV VEH PARTS	1,153.89
2713	02/09/01	160.81	042	ORCHARD SUPPLY HARDWARE	72400	SMALL TOOLS - OPS	87.43
					72401	REPAIRS/MAINT	73.38
2714	02/09/01	484.88	059	BATTERIES U.S.A INC.	72402	REV VEH PARTS	484.88
2715	02/09/01	222.72	061	REGISTER PAJARNIAN	72477	YEAR SUBSCRIPTION	150.60
					72478	LEGAL ADS - ADMIN	72.12
2716	02/09/01	76.00	067	ROTO-ROOTER SEWER/PLUMBING	72403	PLUMBING SUPPLIES	76.00
2717	02/09/01	11,699.08	085	DIXON & SON, INCORPORATED	72404	JAN TIRES - FLEET	11,699.08
2718	02/09/01	68.33	087	RECOGNITION SERVICES LTD.	72476	EMPLOYEE INCENTIVE	68.33
2719	02/09/01	96,925.05	101	EOS CLAIMS SERVICES, INC.	72479	JAN W/C TRUST ACCT	96,925.05
2720	02/09/01	348.99	104	STATE STEEL COMPANY	72405	REV VEH PARTS	291.89
					72406	REPAIRS & MAINT	32.86
					72407	REPAIRS & MAINT	24.24
2721	02/09/01	2,228.02	107	SAN LORENZO LUMBER CO, INC.	72480	JAN SUPPLIES	1,798.91
					72481	JAN SUPPLIES-FLEET	429.11

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2722	02/09/01	3,335.08	115	SNAP-ON TOOLS CORPORATION		72408	MACHINERY & EQUIPT	3,335.08	
2723	02/09/01	2,436.00	116	SANTA CRUZ COMMUNITY		72409	EAP 9/1/00-11/30/00	2,436.00	
2724	02/09/01	599.31	117	GILLIG CORPORATION		72410	REV VEH PARTS	599.31	
2725	02/09/01	185.00	126	EUCALYPTUS COMMERCIAL SER		72411	OUT REPAIR BLD/IMPR	185.00	
2726	02/09/01	2,685.80	135	SANTA CRUZ AUTO PARTS, IN		72412	JAN PARTS/SUPPLIES	2,685.80	
2727	02/09/01	274.18	147	ZEE MEDICAL SERVICE		72413	SAFETY SUPPLIES	274.18	
2728	02/09/01	1,800.00	158	DLD TRUCK STRAPS, INC.		72414	REV VEH PARTS	1,800.00	
2729	02/09/01	101.01	172	CENTRAL WELDERS SUPPLY, I		72415	PARTS/SUPPLIES	101.01	
2730	02/09/01	1,121.92	191	GOLDEN GATE PETROLEUM		72416	FUELS - FLEET	1,121.92	
2731	02/09/01	100.04	210	HOLIDAY MUFFLER SERVICE		72417	OUT REPAIR OTHER VEH	100.04	
2732	02/09/01	1,992.48	225	MISSION PRINTERS		72418	PRINT-BUS PASSES	1,992.48	
2733	02/09/01	393.23	260	SANTA CRUZ GLASS CO., INC		72419	OUT REPAIR BLDG/IMP	393.23	
2734	02/09/01	577.00	271	CARLSON, BRENT D., M.D.,		72420	DEC/JAN EXAMS	577.00	
2735	02/09/01	179.24	282	GRAINGER INC, W. W.		72421	REPAIRS/MAINT	179.24	
2736	02/09/01	40.00	347	HAMM, SCOTT		72422	BACKFLOW TEST-SVTC	40.00	
2737	02/09/01	74.00	372	FEDERAL EXPRESS		72482	JANUARY POSTAGE	74.00	
2738	02/09/01	3,062.50	376	MULTISYSTEMS, INC		72423	JAN-MAR MAINTENANCE	3,062.50	
2739	02/09/01	1,939.22	378	STEWART & STEVENSON		72424	MACHINERY & EQUIPT	812.49	
						72425	REV VEH PARTS	279.35	
						72426	REV VEH PARTS	847.38	
2740	02/09/01	864.00	385	WESTAFF		72427	TEMPS W/E 1/13 FAC	864.00	
2741	02/09/01	2,099.80	410	TRANSIT INFORMATION PRODUCTS		72505	GRAPHIC SERVICES	2,099.80	
2742	02/09/01	493.35	432	EXPRESS PERSONNEL SERVICES		72428	TEMPS W/E 1/7 FLEET	493.35	
2743	02/09/01	285.94	434	VERIZON WIRELESS MESSAGING		72483	FEB ANTENNA - FAC	150.00	
						72484	FEB PAGERS	135.94	
2744	02/09/01	294.72	461	VULTRON INC.		72429	REV VEH PARTS	294.72	
2745	02/09/01	2,935.65	480	DIESEL MARINE ELECTRIC		72430	REV VEH PARTS	2,935.65	
2746	02/09/01	160.00	481	PIED PIPER EXTERMINATORS, INC.		72431	JAN PEST CONTROL	160.00	
2747	02/09/01	498.75	485	LARRY ELECTRIC, INC.		72432	OUT REPAIR BLDG/IMP	498.75	
2748	02/09/01	153,279.13	502	PUBLIC EMPLOYEES'		72485	FEB MEDICAL INS	153,279.13	
2749	02/09/01	300.00	528	NCHRA-NORTHERN CALIFORNIA		72486	MEMBERSHIP DUES	300.00	
2750	02/09/01	119.93	579	LAB SAFETY SUPPLY INC.		72433	SAFETY SUPPLIES	119.93	
2751	02/09/01	40,947.50	633	PRUDENTIAL HEALTHCARE		72487	FEB DENTAL INS	40,947.50	
2752	02/09/01	69.55	667	CITY OF SCOTTS VALLEY		72434	11/15-1/15 KINGS VLG	69.55	
2753	02/09/01	6.00	708	CALIFORNIA HIGHWAY PATROL		72496	REPORT- SC 01-01-12	6.00	
2754	02/09/01	100.00	788	SCMTD PETTY CASH - FINANCE		72435	INCREASE PETTY CASH	100.00	
2755	02/09/01	875.90	932	LEASE CO., A.L. INC.		72436	PLUMBING SUPPLIES	604.48	
						72437	PLUMBING SUPPLIES	271.42	
2756	02/09/01	50.00	E 387	FLAGG, PAULA R.		72445	PARKING FEES JAN-MAR	50.00	
2757	02/09/01	103.92	E059	LEE, HENRY		72501	TRAVEL EXP 1/7/01	103.92	
2758	02/09/01	279.29	E088	O'DONNELL, SHAWN		72438	EMPLOYEE INC. FLEET	279.29	
2759	02/09/01	10.00	E090	CALLEJAS, LETICIA		72439	DMV/VTT FEES OPS	10.00	
2760	02/09/01	47.61	E103	LONGNECKER, LLOYD		72440	TRAVEL-RTCC MTG	47.61	
2761	02/09/01	44.28	E139	LONGNECKER, LLOYD		72441	TRAVEL EXP 1/18/01	44.28	
2762	02/09/01	10.00	E140	CARLSON, JACOB		72488	DMV/VTT FEES - OPS	10.00	
2763	02/09/01	74.00	E143	CLARK, STUART		72442	DMV/VTT FEES - OPS	10.00	
						72443	DMV/VTT FEES OPS	64.00	
2764	02/09/01	48.00	E147	GONG, LUCIA		72444	PARKING FEES JAN-MAR	48.00	
2765	02/09/01	83.50	E323	GALE, TERRY		72497	BOOK-ACCESS 97	29.75	
						72502	TRAVEL EXP 2/2/01	53.75	

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2766	02/09/01	48.88	E373	DORFMAN, MARK		72498	TRAVEL EXP APTA-JAN	48.88	
2767	02/09/01	73.58	E501	BAEHR, BRYANT		72489	LUNCH RE FAREBOXES	73.58	
2768	02/09/01	19.44	E521	HERNANDEZ, JAIME		72503	TRAVEL EXP 1/11	19.44	
2769	02/09/01	236.61	M014	HARRELL, LAURA		72490	JAN PDP INSURANCE	236.61	
2770	02/09/01	175.18	R338	BUDGET RENT A CAR		72499	SETTLEMENT OF CLAIM	175.18	
2771	02/09/01	704.34	R339	SANTA CRUZ AUTO BODY		72500	SETTLEMENT OF CLAIM	704.34	
2773	02/23/01	3,390.39	001	PACIFIC BELL/SAC		72511	FEB SUMMARY BILL	2,713.49	
						72683	FEB PHONE LINE MIS	338.45	
						72684	FEB PHONE LINE MIS	338.45	
2774	02/23/01	386.42	001052	MID VALLEY SUPPLY		72512	CUSTODIAL SUPPLY	386.42	
2775	02/23/01	2,105.18	001063	NEW FLYER INDUSTRIES LIMITED		72513	REV VEH PARTS 103	103.16	
						72514	REV VEH PARTS	247.20	
						72515	REV VEH PARTS 136	136.12	
						72516	PARTS & SUPPLIES 125	124.60	
						72517	REV VEH PARTS 1449	1,494.10	
2776	02/23/01	113.14	001112	BRINK'S TROPHY SHOPPE		72518	BOARD NAME PLATES	113.14	
2777	02/23/01	326.28	001119	MACERICH PARTNERSHIP, LP THE		72519	LEASE -CAPITOLA MALL	1,326.28	
2778	02/23/01	178.29	001315	WASTE MANAGEMENT OF S C		72520	JAN-MAR LOMOND/HWY	34.80	
						72521	JAN KINGS VILLAGE	108.69	
						72522	JAN-MAR BIG BASIN/HW	34.80	
2779	02/23/01	22,244.11	001346	CITY OF SANTA CRUZ		72523	POLICE OFFICER @ MC	22,244.11	
2780	02/23/01	30.00	001374	SANTA CRUZ COUNTY SHERIFF		72524	SMALL CLAIMS FEE	30.00	
2781	02/23/01	716.95	001379	SAFETY-KLEEN CORP		72525	PARTS WASHER-GOLF CL	716.95	
2782	02/23/01	369.09	001407	RED WING SHOE STORE		72526	JAN BOOTS - FAC/FLT	369.09	
2783	02/23/01	318.60	001590	A SIGN ASAP		72527	REV VEH PARTS	318.60	
2784	02/23/01	1,120.57	001627	NEW PIG CORPORATION		72528	H/D PALLET 1038	1,120.57	
2785	02/23/01	17.23	001648	STEVE'S UNION		72529	JAN FUELS - FLEET	17.23	
2786	02/23/01	331.04	001711	MOHAWK MFG. & SUPPLY CO.		72530	REV VEH PARTS 331	331.04	
2787	02/23/01	66.75	001733	STOODLEY'S SMALL ENGINE SERVIC		72531	REPAIRS/MAINT SUPPLY	66.75	
2788	02/23/01	423.07	001737	UNITED STATES PLASTIC CORP.		72532	CUSTODIAL SUPPLY 344	423.07	
2789	02/23/01	115,722.08	001762	FOOD & NUTRITION SERVICES, INC		72685	DEC ADA PARATRANSIT	115,722.08	
2790	02/23/01	421.00	001844	BRINKS INCORPORATED		72533	FEBRUARY SECURITY	421.00	
2791	02/23/01	105.00	001856	BAY COMMUNICATIONS		72534	JAN PHONE REPAIRS	105.00	
2792	02/23/01	900.00	001887	HUMPHREY, YVONNE A.		72535	LEASE VERNON ST LOT	900.00	
2793	02/23/01	742.67	001936	WORLDCOM TECHNOLOGIES, INC.		72536	JAN LONG DISTANCE	742.67	
2794	02/23/01	2,331.85	001991	BAY STAFFING		72537	TEMPS W/E 1/28 HRD	176.40	
						72538	TEMPS W/E 1/28	486.50	
						72539	TEMPS W/E 1/28 FLEET	1,058.40	
						72540	TEMPS W/E 12/10	2.95	
						72541	TEMPS W/E 1/21 HRD	607.60	
2795	02/23/01	322.51	002063	COSTCO		72542	AIR CLEANER - OPS	163.86	
						72543	SAFE - OPS	109.24	
						72544	PHOTO PROCESS-LEGAL	13.28	
						72545	PHOTO PROCESS- OPS	36.13	
2796	02/23/01	27,262.06	002116	, EDWARD & BARBARA		72546	LEASE- 370 ENCINAL	21,706.43	
2797	02/23/01	9,886.58	002117	IULIANO NICK		72547	LEASE - 120 DUBOIS	5,555.63	
2798	02/23/01	425.00	002125	RUTGERS UNIVERSITY - NTI		72548	LEASE - 111 DUBOIS	9,886.58	
2799	02/23/01	79.67	002161	APPLIED INDUSTRIAL TECH		72549	SEMINAR 4/1-4 MAWSON	425.00	
						72550	REPAIRS/MAINT FAC	73.39	
						72551	REPAIRS/MAINT FAC	6.28	



SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
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2800	02/23/01	505.00	002168	DSL.NET	72552	FEB CENTREX LINE	505.00	
2801	02/23/01	2,007.74	002192	BAY EQUIPMENT & REPAIR	72553	OUT REPAIR VEH-FLEET	2,007.74	
2802	02/23/01	6,800.00	002210	GRANT THORNTON, LLP	72686	AUDIT JUNE 30,2000	6,800.00	
2803	02/23/01	800.00	002212	CONFLICT RESOLUTION PROGRAM	72554	MEDIATION SVCS-PLANG	800.00	
2804	02/23/01	582.04	002240	KLEEN-RITE	72555	OUT REPAIR EQUIPT	582.04	
2805	02/23/01	377.11	002245	STAPLES CREDIT PLAN	72556	CASH REGISTER-PLANNG	377.11	
2806	02/23/01	2,000.00	002267	SHAW & YODER	72557	JAN LEGISLATIVE REP	2,000.00	
2807	02/23/01	3,750.00	002346	CHANEY, CAROLYN & ASSOC., INC.	72558	FEB PROF SERVICES	3,750.00	
2808	02/23/01	2,000.00	002352	UNITED STATES POSTAL SERVICE	72559	POSTAGE - ADMIN	2,000.00	
2809	02/23/01	11.58	002447	SETON IDENTIFICATION PRODUCTS	72561	NAME PLATES-FAC	11.58	
2810	02/23/01	235.00	002448	CLEARVIEW WINDOWS	72562	WINDOW CLEANING WTC	235.00	
2811	02/23/01	143.91	002520	TWO R.M.'S SALES AND SERVICE	72563	REPAIRS/MAINT FAC	143.91	
2812	02/23/01	600.00	002527	SOLAR DESIGN	72564	JAN SVT LANDSCAPING	300.00	
					72565	NOV-JAN WTC LANDSCP	300.00	
2813	02/23/01	352.00	002567	DEPARTMENT OF JUSTICE	72687	OCT FINGERPRINTING	224.00	
					72688	JAN FINGERPRINTING	128.00	
2814	02/23/01	2,217.30	002610	FREDERICK ELECTRONICS CORP.	72566	LEASE- 375 ENCINAL	2,217.30	
2815	02/23/01	177.14	002627	CDW GOVERNMENT, INC.	72567	MICROSOFT MSDN 168	177.14	
2816	02/23/01	533.19	002639	NEXTEL COMMUNICATIONS	72568	JAN CELL PHONES	533.19	
2817	02/23/01	520.29	002643	IOS CAPITAL	72569	1/22-3/21 COPIER	520.29	
2818	02/23/01	1,714.23	002672	USL FINANCIALS	72570	TRAVEL EXP- USL	1,714.23	
2819	02/23/01	114.83	002696	UNITED BUS CORPORATION	72571	REV VEH PARTS	114.83	
2820	02/23/01	609.50	002713	SANTA CRUZ AUTO TECH, INC	72572	REPAIR VEH #8025	523.07	
					72573	REPAIR VEH #8025	86.43	
2821	02/23/01	227.55	007	UNITED PARCEL SERVICE	72689	JAN FREIGHT CHARGES	227.55	
2822	02/23/01	9,704.80	009	PACIFIC GAS & ELECTRIC	72574	1/11-2/10 KINGS VLG	465.29	
					72575	1/11-2/10 KINGS VLG	556.45	
					72576	1/11-2/10 KINGS VLG	11.23	
					72577	1/6-2/6 PACIFIC AVE	717.08	
					72578	1/6-2/6 PACIFIC AVE	345.90	
					72579	1/2-1/31 RIVER ST	645.25	
					72580	1/2-1/31 RIVER ST	1,160.04	
					72581	1/2-1/31 GOLF CLUB	2,615.17	
					72582	1/2-1/31 GOLF CLUB	1,148.42	
					72583	1/6-2/6 PACIFIC AVE	361.47	
					72584	1/6-2/6 PACIFIC AVE	957.09	
					72585	1/6-2/6 PACIFIC AVE	656.66	
					72590	1/12-2/14 PAUL SWEET	64.75	
2823	02/23/01	709.62	013	MCI SERVICE PARTS, INC.	72586	REV VEH PARTS	364.84	
					72587	REV VEH PARTS	344.78	
2824	02/23/01	80.91	023	PACIFIC TRUCK PARTS, INC.	72588	REV VEH PARTS	80.91	
2825	02/23/01	76.86	036	KELLY-MOORE PAINT CO INC.	72589	PRIMER - FAC MAINT	76.86	
2826	02/23/01	89.68	037	USOP NORTHERN CALIFORNIA	72590	OFFICE SUPPLY OPS	22.79	
					72591	OFFICE SUPPLY FAC	66.89	
2827	02/23/01	1,415.62	039	KINKO'S INC.	72592	PRINTING - ADMIN	325.73	
					72593	PRINTING - MIS	333.17	
					72594	PRINTING ADMIN	554.03	
					72595	PRINTING -PLANNING	202.69	
2828	02/23/01	1,876.04	041	MISSION UNIFORM	72596	JAN UNIFORMS/LAUNDRY	368.90	
					72597	JAN UNIFORMS/LAUNDRY	145.29	

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					72598	JAN UNIFORMS/LAUNDRY	759.61	
					72599	JAN UNIFORMS/LAUNDRY	220.09	
					72600	JAN UNIFORMS/LAUNDRY	313.50	
					72601	JAN UNIFORMS/LAUNDRY	68.45	
2829	02/23/01	287.12	042 ORCHARD SUPPLY HARDWARE		72602	JAN PARTS/SUPPLIES	287.12	
2830	02/23/01	3,134.89	043 PALACE ART & OFFICE SUPPLY		72603	CREDIT - OPS	-35.85	
					72604	OFFICE SUPPLY- HRD	105.86	
					72605	OFFICE SUPPLY- FAC	80.69	
					72606	OFFICE SUPPLY- ADMIN	191.91	
					72607	COPY PAPER - ADMIN	395.28	
					72608	OFFICE SUPPLY-FLEET	129.17	
					72609	H/D STAPLER-FLEET	17.22	
					72610	OFFICE SUPPLY-FAC	67.70	
					72611	COMP PAPER/RIBBONS	1,098.79	
					72612	HEPA FILTER - OPS	90.97	
					72613	WORKSTATION- PLANNG	163.78	
					72614	OFFICE SUPPLY-PLANNG	71.30	
					72615	OFFICE SUPPLY -OPS	758.05	
2831	02/23/01	1,394.82	045 ROYAL WHOLESALE ELECTRIC		72616	REV VEH PARTS	1,394.82	
2832	02/23/01	456.86	059 BATTERIES U.S.A. INC.		72617	REV VEH PARTS	456.86	
2833	02/23/01	206.00	067 ROTO-ROOTER SEWER /PLUMBING		72618	OUT REPAIR BLDG/IMP	206.00	
2834	02/23/01	24.05	074 KENVILLE & SONS LOCKSMITH		72619	MECHANICAL SUPPLY	24.05	
2835	02/23/01	369.20	075 COAST PAPER & SUPPLY INC.		72620	CUSTODIAL SUPPLY	369.20	
2836	02/23/01	12.80	079 SANTA CRUZ MUNICIPAL UTILITY		72621	DUMP FEES - FAC	12.80	
2837	02/23/01	813.00	080 STATE BOARD OF EQUALIZATION		72691	JAN USE TAX	813.00	
2838	02/23/01	836.96	081 KAR PRODUCTS		72622	REV VEH PARTS/SUPPLY	836.96	
2839	02/23/01	3,206.00	083 THYSSEN DOVER ELEVATOR		72623	5 YEAR LOAD TEST	3,206.00	
2840	02/23/01	206.25	090 CRYSTAL SPRINGS WATER CO.		72624	JAN WATER - FLEET	206.25	
2841	02/23/01	2,100.00	110 TRANSMART		72625	CUSTODIAN SERVICES	2,100.00	
2842	02/23/01	2,984.53	117 GILLIG CORPORATION		72626	REV VEH PARTS	1,357.29	
					72627	REV VEH PARTS	1,326.99	
					72628	REV VEH PARTS	300.25	
2843	02/23/01	23.48	123 BAY PHOTO LAB INC		72629	PHOTO PROCESS-PLANG	7.55	
					72630	PHOTO PROCESS-PLANG	15.93	
2844	02/23/01	88.52	130 WATSONVILLE CITY WATER DEPT.		72631	1/3-2/1 RODRIGUEZ	8.80	
					72632	1/3-2/1 SAKATA	12.45	
					72633	1/2-2/1 SAKATA	67.27	
2845	02/23/01	1,575.50	134 DAY WIRELESS SYSTEMS		72634	OUT REPAIR EQUIPT	1,575.50	
2846	02/23/01	95.68	144 BOSS MANUFACTURING CO.		72635	RAIN SUITS-FLEET	95.68	
2847	02/23/01	1,739.65	148 ZEP MANUFACTURING COMPANY		72636	REV VEH PARTS/SUPPLY	685.59	
					72637	REV VEH PARTS	476.25	
					72638	55 GAL BARREL-FLEET	577.81	
2848	02/23/01	143.96	149 SANTA CRUZ SENTINEL		72639	LEGAL ADS - ADMIN	143.96	
2849	02/23/01	422.02	161 OCEAN CHEVROLET INC		72640	REV VEH PARTS FLEET	422.02	
2850	02/23/01	314.97	166 HOSE SHOP, INC.,THE		72641	REV VEH PARTS/SUPPLY	314.97	
2851	02/23/01	1,500.22	170 TOWNSEND'S AUTO PARTS		72642	REV VEH PARTS/SUPPLY	1,500.22	
2852	02/23/01	40.12	172 CENTRAL WELDERS SUPPLY, INC.		72643	PARTS/SUPPLIES FLEET	40.12	
2853	02/23/01	15,090.99	192 ALWAYS UNDER PRESSURE		72644	MACHINERY/EQUIPT	1,427.69	
					72645	MACHINERY/EQUIPT	13,663.30	
2854	02/23/01	8,038.07	196 LIFT-U-INC.		72646	REV VEH PARTS	7,884.55	

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2855	02/23/01	865.90	21	BOWMAN DISTRIBUTION		72647	REV VEH PARTS	153.52	
						72648	PARTS & SUPPLY 806	851.42	
						72649	PARTS & SUPPLY 14	14.48	
2856	02/23/01	211.20	215	IKON OFFICE SOLUTIONS		72650	2/1-3/1 COPIER MAINT	211.20	
2857	02/23/01	64.65	225	MISSION PRINTERS		72651	BUSINESS CARDS-LEGAL	64.65	
2858	02/23/01	180.06	247	AUTOMATIC DOOR SYSTEMS, INC		72652	REPAIR AUTO DOOR-EMC	180.06	
2859	02/23/01	1,807.72	294	ANDY'S AUTO SUPPLY		72653	JAN SUPPLIES-FLEET	1,807.72	
2860	02/23/01	172.00	309	GOOD TIMES		72692	CLASSIFIED ADS-HRD	172.00	
2861	02/23/01	362.69	316	WATSONVILLE AUTO SUPPLY		72654	REV VEH PARTS	362.69	
2862	02/23/01	3,303.38	378	STEWART & STEVENSON		72655	MACHINERY/EQUIPT	1,358.66	
						72656	REV VEH PARTS	1,866.19	
						72657	REV VEH PARTS	78.53	
2863	02/23/01	960.00	385	WESTAFF		72658	TEMPS W/E 1/27 FAC	480.00	
						72659	TEMPS W/E 1/20 FAC	480.00	
2864	02/23/01	709.49	395	APPL ED GRAPHICS, NC.		72660	ENVELOPES- FLEET	115.51	
						72661	VEHICLE CHECK SHEETS	593.98	
2865	02/23/01	54.70	396	LASHER AUTO CENTER		72662	ADDITIONAL SALES TAX	54.70	
2866	02/23/01	2,000.00	433	AMPAC BUILDING MAINTENANCE		72663	JAN SERVICE SVTC	2,000.00	
2867	02/23/01	139.03	436	WEST GROUP PAYMENT CTR		72664	DEC MONTHLY CHARGES	99.16	
						72665	CA VEH COPIES SUBSC.	39.87	
2868	02/23/01	45.00	440	RUNFOROFFICE.COM		72560	JAN-MAR ELEC FILE	45.00	
2869	02/23/01	446.33	449	WESTERN APPLIANCE		72666	REFRIGERATOR-OPS	446.33	
2870	02/23/01	1,200.00	451	MARKOWITZ, PAUL		72693	REPAIR WINDOW-METRO	1,200.00	
2871	02/23/01	1,673.90	480	DIESEL MARINE ELECTRIC		72667	REV VEH PARTS	1,673.90	
2872	02/23/01	23,326.72	500	PAIGE'S SECURITY SERVICES, INC		72668	JAN SECURITY SVCS	23,326.72	
2873	02/23/01	206.80	510	ASCOM HASLER LEASING		72669	POSTAGE METER RENTAL	206.80	
2874	02/23/01	50.46	520	LIB COMPUTER & INFO		72670	VISUAL BASIC PROGR.	50.46	
2875	02/23/01	316.55	522	L. PH. BOLANDER & SONS		72671	REPAIRS/MAINT FAC	316.55	
2876	02/23/01	99,980.00	529	FOOTHILL TRANSIT		72694	20 GILLS BUSES	99,980.00	
2877	02/23/01	91.56	579	LAB SAFETY SUPPLY INC.		72672	SAFETY SUPPLIES	91.56	
2878	02/23/01	21.00	667	CITY OF SCOTTS VALLEY		72695	ANNUAL ALARM REG.	21.00	
2879	02/23/01	84.00	712	IFEBP-PUBLICATIONS DEPARTMENT		72698	PUBLICATION BINDERS	84.00	
2880	02/23/01	2,369.50	753	DEPARTMENT OF GENERAL SERVICES		72673	STATE CHARGES 7 VANS	2,369.50	
2881	02/23/01	166.53	788	SCMTD PETTY CASH - FINANCE		72696	1/25-2/1 <sup>0</sup> PETTY CASH	166.53	
2882	02/23/01	768.80	854	AMERICAN SEATING COMPANY		72674	REV VEH PARTS	768.80	
2883	02/23/01	321.45	932	LEASE CO., A.L. INC.		72675	PLUMBING SUPPLIES	321.45	
2884	02/23/01	200.00	B001	AINSWORTH, SHERYL		72697	AFTA CONF 3/10-14	200.00	
2885	02/23/01	200.00	B004	FITZMAURICE, TIM		72699	AFTA CONF. 3/10-14	200.00	
2886	02/23/01	330.00	E047	SLOAN, FRANK		72700	TOOL ALLOWANCE-MOU	330.00	
2887	02/23/01	330.00	E059	LEE, HENRY		72701	TOOL ALLOWANCE-MOU	330.00	
2888	02/23/01	339.14	E066	PRICE, HARRY		72676	EMERGENCY OT MEAL	9.14	
						72702	TOOL ALLOWANCE - MOU	330.00	
2889	02/23/01	330.00	E067	SWART, RANDY		72703	TOOL ALLOWANCE-MOU	330.00	
2890	02/23/01	330.00	E071	CERVANTES, PEDRO		72704	TOOL ALLOWANCE-MOU	330.00	
2891	02/23/01	330.00	E073	LOGUIDICE, FRED		72705	TOOL ALLOWANCE-MOU	330.00	
2892	02/23/01	330.00	E076	HANSEN, MARK		72706	TOOL ALLOWANCE-MOU	330.00	
2893	02/23/01	408.15	E077	PEREZ, RICARDO		72677	TRAVEL EXP 1/28-2/1	78.15	
						72707	TOOL ALLOWANCE-MOU	330.00	
2894	02/23/01	330.00	E078	JENSEN, MERAL		72708	TOOL ALLOWANCE-MOU	330.00	
2895	02/23/01	296.86	E079	VAN DYKE, CURTIS		72709	TOOL ALLOWANCE-MOU	296.86	

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2896	02/23/01	330.00	E081	REGAN, MICHAEL		72710	TOOL ALLOWANCE-MOU	330.00	
2897	02/23/01	330.00	E083	TOLINE, DONALD		72711	TOOL ALLOWANCE-MOU	330.00	
2898	02/23/01	330.00	E084	RODRIGUEZ, VAL		72712	TOOL ALLOWANCE-MOU	330.00	
2899	02/23/01	330.00	E085	HALL, JIM		72713	TOOL ALLOWANCE-MOU	330.00	
2900	02/23/01	10.00	E098	OTTO, JOHN		72678	DMV/VTT FEES OPS	10.00	
2901	02/23/01	44.85	E103	LONGNECKER, LLOYD		72679	TRAVEL EXP REIMBURSE	44.85	
2902	02/23/01	330.00	E119	GABRIEL, RICHARD		72714	TOOL ALLOWANCE-MOU	330.00	
2903	02/23/01	330.00	E226	HOWARD, WARD		72715	TOOL ALLOWANCE-MOU	330.00	
2904	02/23/01	330.00	E235	THOMAS, RUSSELL		72716	TOOL ALLOWANCE-MOU	330.00	
2905	02/23/01	330.00	E284	HOLDNICK, JAMES		72717	TOOL ALLOWANCE-MOU	330.00	
2906	02/23/01	330.00	E288	OJEDA, ROBERTO		72718	TOOL ALLOWANCE-MOU	330.00	
2907	02/23/01	281.66	E299	CRAIG, CRAIG		72719	TOOL ALLOWANCE-MOU	281.66	
2908	02/23/01	200.00	E303	MCGLAZE, GILLIAN		72720	FTA SEMINAR 3/5-9	200.00	
2909	02/23/01	330.00	E308	FALLAU, NICHOLAS		72721	TOOL ALLOWANCE-MOU	330.00	
2910	02/23/01	44.00	E389	FORRESTER, THOMAS MARK		72680	DMV/VTT FEES - OPS	44.00	
2911	02/23/01	330.00	E395	GARCIA, SAMUEL		72722	TOOL ALLOWANCE-MOU	330.00	
2912	02/23/01	357.74	E495	WHITE, LES		72681	TRAVEL EXP 1/27-2/4	77.74	
						72723	APTA CONF 3/10-14	280.00	
2913	02/23/01	330.00	E521	HERNANDEZ, JAIME		72724	TOOL ALLOWANCE-MOU	330.00	
2914	02/23/01	240.00	M014	HARRELL, LAURA		72682	FEB PDP INSURANCE	240.00	
2915	02/26/01	130.00	M001	HORTON, JOSEPH		72725	FEB MEDICAL PREMIUM	130.00	
2916	02/26/01	130.00	M002	RACKLEY, EARL		72726	FEB MEDICAL PREMIUM	130.00	
2917	02/26/01	65.00	M003	WYANT, JUDI		72727	FEB MEDICAL PREMIUM	65.00	
2918	02/26/01	65.00	M004	PORTILLA, EARLENE		72728	FEB MEDICAL PREMIUM	65.00	
2919	02/26/01	65.00	M005	ROSS, EMERY		72729	FEB MEDICAL PREMIUM	65.00	
2920	02/26/01	169.00	M006	VAN DER ZANDE, ED		72730	FEB MEDICAL PREMIUM	169.00	
2921	02/26/01	122.00	M007	BLAIR-ALWARD, GREGORY		72731	FEB MEDICAL PREMIUM	122.00	
2922	02/26/01	122.00	M008	CAMPOS, ARVILLA		72732	FEB MEDICAL PREMIUM	122.00	
2923	02/26/01	339.00	M009	FREEMAN, MARY		72733	FEB MEDICAL PREMIUM	339.00	
2924	02/26/01	122.00	M010	SHORT, SLOAN		72734	FEB MEDICAL PREMIUM	122.00	
2925	02/26/01	46.00	M011	LAWSON, LOIS		72735	FEB MEDICAL PREMIUM	46.00	
2926	02/26/01	46.00	M012	ROSE, JACK		72736	FEB MEDICAL PREMIUM	46.00	
2927	02/26/01	38.00	M013	JAHNKE, EILEEN		72737	FEB MEDICAL PREMIUM	38.00	
TOTAL		1,891,506.73		COAST COMMERCIAL BANK			TOTAL CHECKS 259	1,891,506.73	
							DISCOUNT	2.95	
							A/P TOTAL	1,891,509.68	

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
OPERATIONS DIVISION - PASSENGER LIFT USAGE REPORT  
FEBRUARY, 2001**

<u>ACCESSIBLE ROUTES</u>	<u>CURRENT MONTH</u>	<u>LAST MONTH</u>
ROUTE #1/7 UCSC Beach	31	13
ROUTE #1/3B/4/7 UCSC/MISSION/HARVEY WEST BEACH - WEEKENDS	7	10
ROUTE #8/1 EMELINE/UCSC - WEEKDAYS	34	25
ROUTE #12 SEABRIGHT/UCSC - WEEKDAYS	0	1
ROUTE #30/31/6/36 SCOTTS VALLEY/SEABRIGHT - WEEKDAYS	39	46
ROUTE #30/6/2/3A/4/6 WESTERN/MISSION STREET/HARVEY WEST/SEABRIGHT - WEEKENDS	9	14
ROUTE #33/34 FELTON/LOMPICO/ZAYANTE - WEEKDAYS	1	7
ROUTE #35/35A/36 SANTA CRUZ/BOULDER CREEK	66	72
ROUTE #40/41 DAVENPORT/BONNY DOON - WEEKDAYS	5	2
ROUTE #40/41/42 DAVENPORT/BONNY DOON - WEEKENDS	6	8
ROUTE #51/52/60/63/81/42 CAPITOLA/SOQUEL/DOMINICAN - WEEKDAYS	160	200
ROUTE #54/59/60 IA SELVA/CAPITOLA/SOQUEL -WEEKENDS	2	7
ROUTE #2/3A/3B/4/7/65/66/67 MISSION/WESTERN/HARVEY WEST BEACH/LIVE OAK - WEEKDAYS	345	328
ROUTE #65/66/67 LIVE OAK - WEEKENDS	55	71
ROUTE #1/3N/54/69/69N/69W UCSC/APTOS/CABRILLO - WEEKDAYS	257	277
ROUTE #69A/69W SANTA CRUZ/WATSONVILLE - WEEKENDS	37	25
ROUTE #70/81/36 CABRILLO/SANTA CRUZ/CAPITOLA MALL/ WATSONVILLE - WEEKDAYS	93	56
ROUTE #71 SANTA CRUZ/WATSONVILLE	317	281
ROUTE #72/73/75/78/79 WATSONVILLE/LOCAL	209	180
ROUTE #91/81 COMMUTER EXPRESS/CAPITOLA MALL/ WATSONVILLE - WEEKDAYS	42	41

FIRST NIGHT			3
HOMELESS SHELTER SHUTTLE		39	
<u>TOTAL LIFT PASSENGERS</u>	6	6	1754
			5

NO. OF MECHANICAL FAILURES OF LIFTS IN-SERVICE		0	1
TOTAL NUMBER OF HOURS DROPPED DUE TO LIFT FAILURE		0:00	1 :00
NUMBER OF PASSENGERS PASSED UP DUE TO NON-FUNCTIONING LIFTS ON ACCESSIBLE ROUTES		0	0
NUMBER OF TIMES A DISTRICT BACK-UP LIFT VAN WAS UTILIZED		0	0

7-3.2

BUS OPERATOR LIFT TEST \*PULL-OUT\* (ACCESSIBLE FLEET ONLY)

VEHICLE CATEGORY	TOTAL BUSES	AVG # DEAD IN GARAGE	AVG #AVAIL. FOR SERVICE	AVG # IN SERVICE	AVG # SPARE BUSES	AVG # LIFTS OPERATING	% LIFTS WORKING ON PULL-OUT BUSES
FLYER	63	9	54	47	7	47	100%
GILLIG	28	3	25	16	9	16	100%
GMC	8	3	5	4	1	4	100%
CHAMPION	4	1	3	1	2	1	100%

BUS OPERATOR LIFT TEST \*PULL-IN\* (ACCESSIBLE FLEET ONLY)

VEHICLE CATEGORY	TOTAL BUSES	AVG # DEAD IN GARAGE	AVG #AVAIL. FOR SERVICE	AVG # IN SERVICE	AVG # SPARE BUSES	AVG # LIFTS OPERATING	% LIFTS WORKING ON PULL-OUT BUSES
FLYER	63	N/A	N/A	45	N/A	45	100%
GILLIG	28	N/A	N/A	8	N/A	8	100%
GMC	8	N/A	N/A	3	N/A	3	100%
CHAMPION	4	N/A	N/A	1	N/A	1	100%

BIKE REPORT

THIS MONTH    LAST MONTH

TOTAL BIKES CARRIED	12958	14353
---------------------	-------	-------

7-3.3

SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

PASSENGERLIFTPROBLEMS

MONTH OF FEBRUARY, 2001

DATE	DAY	BUS #	REASON
02/01/01	THURSDAY	8305GM	Got stuck in Kneel for 10+ minutes
02/08/01	THURSDAY	8092F	Lift will not stow, moves inward slightly, stuck out
02/14/01	WEDNESDAY	80656 F	Problem with lift
02/14/01	WEDNESDAY	8305GM	Lift will not deploy
02/17/01	SATURDAY	9801 LF	Problem with lift
02/19/01	MONDAY	8080F	had to push by hand to stow
02/20/01	TUESDAY	8091 F	Lift won't stow, has to be pushed in
02/20/01	TUESDAY	9801 LF	No lift
02/21/01	WEDNESDAY	8050G	Lift not working
02/21/01	WEDNESDAY	8087F	Lift platform stows slowly, sometimes needs repeated attempts
02/22/01	THURSDAY	8061 G	Warning bell on lift is intermittent
02/22/01	THURSDAY	8060G	Problem with lift
02/22/01	THURSDAY	8106GR	Problem with lift
02/23/01	FRIDAY	8092F	Kneel will not stay down
02/23/01	FRIDAY	9820LF	Kneel will not stay down
02/24/01	SATURDAY	9828LF	W/C ramp bell doesn't work, can barely hear warning bell
02/24/01	SATURDAY	8080F	Lift won't retract without help
02/26/01	MONDAY	8060G	Problem with lift
02/26/01	MONDAY	8087F	W/C slow to stow
02/27/01	TUESDAY	8050G	No lift
02/27/01	TUESDAY	8087F	No lift
02/27/01	TUESDAY	9823LF	Problem with lift
02/28/01	WEDNESDAY	9801 LF	No lift
02/28/01	WEDNESDAY	8096F	Kneel doesn't work

- F New Flyer
- G Gillig
- GR Grumman
- C Champion
- LF Low Floor Flyer
- GM GMC

Note: Lift operating problems that cause delays of less than 30 minutes.

7-3.4



# GOVERNMENT TORT CLAIM

## RECOMMENDED ACTION

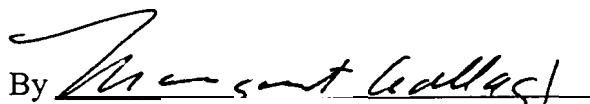
TO: Board of Directors

FROM: District Counsel

RE: Claim of: Gary Shirk                      Received: 2/2/01                      Claim #: 01-0002  
Date of Incident: 9/30/00                      Occurrence Report No.: SC 09-00-33

In regard to the above-referenced Claim, this is to recommend that the Board of Directors take the following action:

- 1. Deny the claim.
- 2. Deny the application to file a late claim.
- 3. Grant the application to file a late claim.
- 4. Reject the claim as untimely filed.
- 5. Reject the claim as insufficient.
- 6. Approve the claim in the amount of \$\_\_\_\_\_ and reject it as to the balance, if any.

By   
Margaret Gallagher  
DISTRICT COUNSEL

Date: February 26, 2001

I, Dale Carr, do hereby attest that the above Claim was duly presented to and the recommendations were approved by the Santa Cruz Metropolitan Transit District's Board of Directors at the meeting of March 16, 2001.

\_\_\_\_\_  
Dale Carr  
Recording Secretary

\_\_\_\_\_  
Date

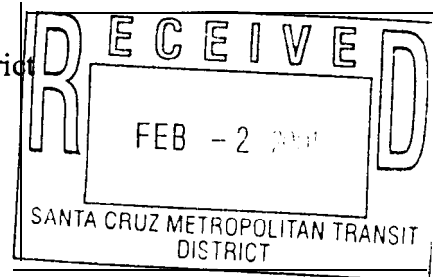
CLAIM AGAINST THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

(Pursuant to Section 910 et Seq., Government Code)

Claim # \_\_\_\_\_

TO: BOARD OF DIRECTORS, Santa Cruz Metropolitan Transit District

ATTN: Secretary to the Board of Directors  
370 Encinal Street, Suite 100  
Santa Cruz, CA 95060



1. Claimant's Name: Gary Shirk

Claimant's Address/Post Office Box:  
2990 SOQUEL AVE, Santa Cruz, CA 95062

Claimant's Phone Number: 831-464-2290

2. Address to which notices are to be sent: 55 River Street #230  
Santa Cruz, CA 95060 c/o Ralph Boroff, Esq

3. Occurrence: While riding a Santa Cruz Transit  
Bus in Santa Cruz County

Date: 9/30/01 Time: 4:15 pm Place: S.C. Transit Bus

Circumstances of occurrence or transaction giving rise to claim:

A Santa Cruz Transit bus driver failed to  
adhere to transit policy and safely secure  
Gary Shirk, a wheelchair rider, properly. Later, she  
slammed on her brakes causing Mr. Shirk to fly from his chair.

4. General description of indebtedness, obligation, injury, damage, or loss incurred so far as is known: Gary Shirk sustained a broken leg, scapular  
injury, concussion and civil rights violations  
under the Americans with Disabilities Act  
Title II and California State Law

5. Name or names of public employees or employees causing injury, damage, or loss, if known:  
not known at this time

6. Amount claimed now ..... \$ 500,000  
Estimated amount of future loss, if known ..... \$ 500,000  
TOTAL ..... \$ 1,000,000

7. Basis of above computations: Damages for personal injuries  
pain and suffering, medical, future medical and  
court costs w/o interest.

[Signature]  
CLAIMANT'S SIGNATURE OR  
COMPANY REPRESENTATIVE'S SIGNATURE OR  
PARENT OF MINOR CLAIMANT'S SIGNATURE

1-29-01  
DATE

Note: Claim must be presented to the Secretary to the Board of Directors, Santa Cruz Metropolitan Transit District

1 PROOF OF SERVICE

2 I, the undersigned, declare:

3 I am employed in the County of Santa Cruz; I am over the age of 18 and not a party to the  
4 within action. My business address is 55 River Street, Suite 230, Santa Cruz, California.

5 On the date herein below specified, I served the foregoing document, described as set forth  
6 below on the interested parties in this action by placing true copies thereof enclosed in sealed  
7 envelopes, at Santa Cruz, California and addressed as follows:

8 DATE OF SERVICE: February 1, 2001

9 DOCUMENT SERVED: CLAIM AGAINST THE SANTA CRUZ METROPOLITAN  
10 TRANSIT DISTRICT

11 SERVED TO: Secretary to the Board of Directors  
12 370 Encinal Street, Suite 100  
13 Santa Cruz, CA 95060

14  (BY REGULAR MAIL) I cause such envelope(s) with postage thereon fully prepaid to be  
15 placed in the United States Mail at Santa Cruz, California. I am "readily familiar" with this firm's  
16 practice of collection and procedures for mailing. It is deposited with the U. S. Postal Service in the  
17 ordinary course of business at the end of each business day.

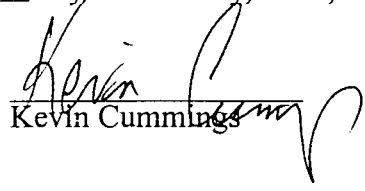
18  I personally caused the above mentioned document to be filed with the Clerk of the appropriate  
19 court.

20  (FEDERAL EXPRESS) I caused such envelope(s) to be delivered by air courier, with next day  
21 service.

22  (BY PERSONAL SERVICE) I delivered such envelope by hand to the offices of the  
23 addressee(s) stated above.

24  (BY FAX TRANSMISSION) I personally caused the above mentioned document to be  
25 transmitted by facsimile to the above mentioned addressee(s).

26 I declare under penalty of perjury under the law of the State of California that the foregoing  
27 is true and correct. Executed this 1<sup>st</sup> day of February, 2001, at Santa Cruz, California, 95060.

28  
  
Kevin Cummings

# GOVERNMENT TORT CLAIM

## RECOMMENDED ACTION

TO: Board of Directors

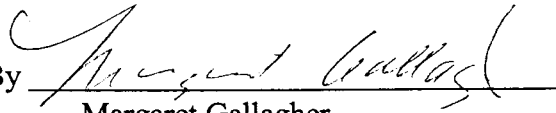
FROM: District Counsel

RE: Claim of: Andy Armanino  
Date of Incident: 02/06/01

Received: 2/22/01 Claim #: 01-0004  
Occurrence Report No.: SC 02-01-08

In regard to the above-referenced Claim, this is to recommend that the Board of Directors take the following action:

- 1. Deny the claim.
- 2. Deny the application to file a late claim.
- 3. Grant the application to file a late claim.
- 4. Reject the claim as untimely filed.
- 5. Reject the claim as insufficient.
- 6. Approve the claim in the amount of \$\_\_\_ and reject it as to the balance, if any.

By   
Margaret Gallagher  
DISTRICT COUNSEL

Date: February 26, 2001

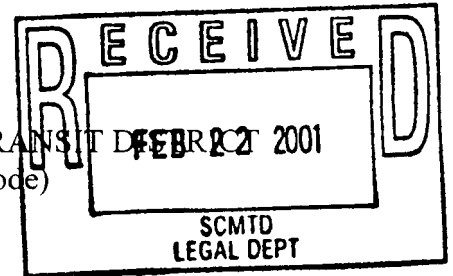
I, Dale Carr, do hereby attest that the above Claim was duly presented to and the recommendations were approved by the Santa Cruz Metropolitan Transit District's Board of Directors at the meeting of March 16, 2001.

\_\_\_\_\_  
Dale Carr-r  
Recording Secretary

\_\_\_\_\_  
Date

5

7-4.4



CLAIM AGAINST THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
(Pursuant to Section 9 10 et Seq., Government Code)  
Claim # 01-0004

TO: BOARD OF DIRECTORS, Santa Cruz Metropolitan Transit District

ATTN: Secretary to the Board of Directors  
370 Encinal Street, Suite 100  
Santa Cruz, CA 95060

1. Claimant's Name: ANDY ARMININO

Claimant's Address/Post Office Box: 706 ESCALON BLVD  
CAPITOLA CA 95010

Claimant's Phone Number: 8314755510

2. Address to which notices are to be sent: SAME

3. Occurrence: \_\_\_\_\_

Date: 2-6-01 Time: 2:30 PM Place: 415 TAVE MARYLE BUREAU

Circumstances of occurrence or transaction giving rise to claim: BUS STOP POLE  
FELL ON OUR CAR. WINDY DAY BUS DRIVER LEFT NOTE ON  
BUS CAR SUSTAINED DAMAGE TO RIGHT SIDE AND TOP OF HOOD

4. General description of indebtedness, obligation, injury, damage, or loss incurred so far as known: SEE ABOVE

5. Name or names of public employees or employees causing injury, damage, or loss, if known: \_\_\_\_\_

6. Amount claimed now..... \$ 1401.44

Estimated amount of future loss, if known ..... \$ \_\_\_\_\_

TOTAL ..... \$ 1401.44

7. Basis of above computations: TWO ESTIMATES ATTACHED PER YOUR TELEPHONE  
INSTRUCTIONS

Andy Arminino

CLAIMANT'S SIGNATURE OR  
COMPANY REPRESENTATIVE'S SIGNATURE OR  
PARENT OF MINOR CLAIMANT'S SIGNATURE

2-20-01

DATE

PLEASE MAKE CHECK PAYABLE TO  
ANDY ARMININO - PER OUR TELEPHONE  
CONVERSATION.

Note: Claim must be presented to the Secretary to the Board of Directors, Santa Cruz Metropolitan Transit District

## FABIAN'S BODY SHOP

3921 SOQUEL DRIVE SOQUEL, CA 95073  
 (631) 47614494  
 Fax: (831) 476-0276  
 Tax ID: 770007346

Damage Assessed By: MIKE GARLAND

Deductible: UNKNOWN

Insured: ANDY ARMANINO  
 Address: 709 ESCALONA DR. CAPITOLA, CA 95010  
 Telephone: Home Phone: (631) 475-5510

Mitchell Service: 912750

Description: 1969 Toyota Cressida  
 Body Style: 4D Sed  
 VIN: JT2MX83E9K0008645  
 Mileage: 219,072  
 OEM/ALT: 0

Drive Train: 3.0L Inj 6 Cyl 4A

Search Code: None

Line Item	Entry Number	Labor Type	Operation	Line Item Description	Part Type/ Part Number	Dollar Amount	Labor Units
1	201960	BDY	REPAIR	HOOD PANEL	Existing		0.5*#
2	AUTO	REF	REFINISH	HOOD OUTSIDE			c 3.1
3	203410	BDY	REPAIR	R FENDER PANEL	Exlstng		1.0*#
4	AUTO	REF	REFINISH	R FENDER OUTSIDE			c 2.2
5	210280	GLS	REMOVE/REPLACE	W/SHIELD GLASS	56111-22590	362.95	3.0 #
6	214550	BDY	REPAIR	R FRT DOOR SHELL	Existing		0.5*#
7	AUTO	REF	REFINISH	R FRT DOOR OUTSIDE			C 1.8
8	936012		ADD'L COST	HAZARDOUS WASTE DISPOSAL		3.00	
9	AUTO	REF	ADD'L OPR	CLEAR COAT			2.0
10	933016	REF	ADD'L OPR	MASK FOR OVERSPRAY		5.00'	0.1'
11	AUTO		ADD'L COST	PAINT/MATERIALS		218.40	

\* - Judgement Item  
 # - Labor Note Applies  
 C - Included in Clear Coat Calc

I. Labor Subtotals						II. Part Replacement Summary	
	Units	Rate	Add'l Labor Amount	Sublet Amount	Totals		Amount
Body	2.0	54.00	0.00	0.00	108.00	Taxable Parts	362.95
Refnish	9.2	54.00	5.00	0.00	501.80	Sales Tax @ 7.750%	28.13
Glass	3.0	54.00	0.00	0.00	162.00	Total Replacement Parts Amount	391.08
Non-Taxable Labor					771.80		
Labor Summary					14.2		771.80

ESTIMATE RECALL NUMBER: 2/20/01 16:39:08 2782

Mitchell Data Version:  
 UltraMate Version:

FEB\_01\_A  
 4.6604

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7-4.6

III. Additional Costs	Amount	IV. Adjustments	Amount
Taxable Costs	221.40	Customer Responsibility	0.00
Sales Tax @ 7.750%	17.16		
<b>Total Additional Costs</b>	<b>238.56</b>		
		I. Total Labor:	771.80
		II. Total Replacement Parts:	391.08
		III. Total Additional Costs:	238.56
		Gross Total:	1,401.44
		IV. Total Adjustments:	0.00
		Net Total:	1,401.44

This is a preliminary estimate.  
Additional changes to the estimate may be required for the actual repair.

\*\*\*\*\*PARTS PRICES SUBJECT TO INVOICES\*\*\*\*\*  
 AUTHORIZED AND ACCEPTED: YOU ARE HEREBY AUTHORIZED TO MAKE THE ABOVE SPECIFIED REPAIRS. I UNDERSTAND THAT PAYMENT IN FULL WILL BE DUE UPON RELEASE OF VEHICLE, INCLUDING ADDITIONAL SUPPLEMENTAL DAMAGE CHARGES, AND HERBY GRANT YOU AND YOUR EMPLOYEES, PERMISSION TO OPERATE THE CAR, TRUCK, OR VEHICLE HEREIN DESCRIBED ON STREETS, HIGHWAYS, OR ELSEWHERE FOR THE PURPOSE OF TESTING AND/OR INSPECTION. AN EXPRESS MECHANIC'S LIEN IS HEREBY ACKNOWLEDGED ON THE ABOVE CAR, TRUCK, OR VEHICLE TO SECURE THE AMOUNT OF REPAIRS THERETO. YOU WILL NOT BE HELD RESPONSIBLE FOR LOSS OR DAMAGE TO THE VEHICLE OR ARTICLES LEFT IN VEHICLE IN CASE OF FIRE, THEFT, ACCIDENT OR ANY OTHER CAUSE BEYOND YOUR CONTROL. OLD PARTS REMOVED FROM CAR WILL BE JUNKED UNLESS OTHERWISE INSTRUCTED.

AUTHORIZED SIGNATURE \_\_\_\_\_

FINAL INSPECTION SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

ESTIMATE RECALL NUMBER: 2/20/01 16:39:08 2782

Mitchell Data Version:  
 UltraMate Version:

FEB\_01\_A  
 4.6.004

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2, 4.7

# Damage Report

NAME: ANDY ARMANDO PHONE: 475 5510 DATE: 3 20 01  
 ADDRESS: 706 ESCOBEDO DR. CITY: CAJONIA STATE: CA ZIP: 95010  
 YEAR: 94 MAKE: TOYOTA MODEL: PROSSIDA COLOR: SILVER  
 LICENSE NUMBER: 2249 9660 APPRAISER: KH20

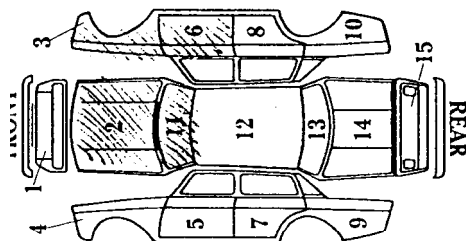
LINE NO.	REPAIR/REPLACE	DESCRIPTION OF DAMAGE	PARTS PRICE	BODY LABOR	FRAME LABOR	PAINT LABOR	WHEELS	PAINT
1	L	FRONT BUMPER		5		2.1		
2	L	R FRONT BUMPERS		1.0		2.0		
3	L	R FRONT BUMPERS						
4	L	R DOOR DUNE		5		2.2		
5								
6								
7		GLASS / R WINDSHIELD 36295	36295	2.5				
8								
9		GLASS / R WINDSHIELD				1.5		
10		GLASS / R WINDSHIELD				1.0		
11								
12								
13		(GROUNTS)						
14								
15		NO OTHER WK						
16								
17								
SUB TOTALS			36295	15.5		9.4		

## Autorella

2280 Soquel Avenue  
Santa Cruz, CA 95062

(831) 475-0400 • FAX 475-0401

AR#AC145771 EPA#CAD981384522



This damage report is based upon our detailed inspection of your vehicle and does not include repairs other than itemized above. Occasionally, additional damage will be discovered once the work is opened up and additional repairs will be required.

Repairs will be made for you as owner. If you do not intend to pay with your own funds, please make certain the insurance company can deliver their check to you in time to pick up your vehicle. All repairs must be paid in full before the vehicle will be released.

If a lienholder is named on the insurance check, their endorsement must be obtained.

We are proud of our technicians and their superior quality craftsmanship. Thank you for letting us serve you.

Authorization X \_\_\_\_\_

PARTS PRICE		36295
BODY LABOR	15.5	297.00
FRAME LABOR		
PAINT LABOR	9.4	507.60
WHEELS		
PNT MAIL:		\$ 206.80
BODY PARTS		
SUBLET		\$
TOWING		
Hazardous waste disposal		\$ 443.00
TAX		
<b>TOTAL</b>		<b>\$ 1421.51</b>



# GOVERNMENT TORT CLAIM

## RECOMMENDED ACTION

TO: Board of Directors

FROM: District Counsel

RE: Claim of: CSE Ins. Group Received: 2/22/01 Claim #: 01-0005  
Date of Incident: 01/25/01 Occurrence Report No.: SC 01-01-12

In regard to the above-referenced Claim, this is to recommend that the Board of Directors take the following action:

- 1. Deny the claim.
- 2. Deny the application to file a late claim.
- 3. Grant the application to file a late claim.
- 4. Reject the claim as untimely filed.
- 5. Reject the claim as insufficient.
- 6. Approve the claim in the amount of \$\_\_\_ and reject it as to the balance, if any.

By Margaret Gallagher  
Margaret Gallagher  
DISTRICT COUNSEL

Date: February 26, 2001

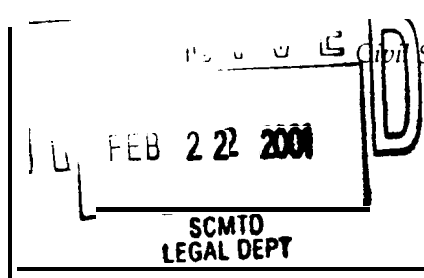
I, Dale Carr, do hereby attest that the above Claim was duly presented to and the recommendations were approved by the Santa Cruz Metropolitan Transit District's Board of Directors at the meeting of March 16, 2001.

\_\_\_\_\_  
Dale Carr  
Recording Secretary

\_\_\_\_\_  
Date



Civil Service  
Employees  
**Insurance Group**



Civil Service Employees Insurance Company  
CSE Safeguard Insurance Company

Santa Cruz Metropolitan Transit District  
370 Encinal Street, Ste. 100  
Santa Cruz, CA 95060

2/20/01

Attention: Elizabeth Gould

Re: **Our Insured** : **William and Lorraine Pyne**  
**Our File No.** 326655  
**Date of Loss** 1/25/01  
**Your Case No.** SC 0101-12

Dear Ms. Gould:

This is your notice of our subrogation interest arising from the above mentioned loss. Our review indicates that your driver was at fault for this accident.

As we have already arranged settlement with our insured, please forward your check or draft in the total amount of \$1,434.24 (includes \$300 deductible) , made payable to CSE Insurance Group.

Attached are copies of our supporting documents.

Sincerely,

Yolanda Reyes  
Lead Subrogation Examiner  
Central Operations  
Civil Service Employees Insurance Company  
Yreyes@cse-insurance.com  
Tel. 925-817-6317

Please indicate our claim number on your check or draft and send in the enclosed pre-addressed envelope.

CC: Agent #42631

7-4.10

Check	0247580	Check Replaces	
Check Date	2/05/01	Check Amount	1,134.24
Check Status		Check Accept Amount	.00
Check Type	P	Check Printed	P
Check Stop ID		Check Stop Date	0/00/00
Check Stop Reason			
Bank	01		
Invoice #		Invoice Date	0/00/00

Mail Address  
PYNE, WILLIAM & LARRAINE A  
192 MT MADONNA RD

Payee Name  
WATSONVILLE CA 95076  
WATSONVILLE AUTO BODY AND WILLAIM & LARRAINE PYNE

In Payment Of  
COLLISION LOSS LESS YOUR \$300 DEDUCTIBLE

F3=Exit F12=Cancel

7-4.11  
*[Handwritten signature]*



Date: 02/02/2001 03:25 PM  
 Estimate ID: SJ 0101157  
 Estimate Version: 0  
 Committed  
 Profile ID: CUSTOMIZED

## WESTERN APPRAISERS OF SAN JOSE

2075 WINCHESTER BLVD. #103 CAMPBELL, CA 95000  
 (408) 374-3551  
 Fax: (408) 378-0293

Damage Assessed By: TONY CELENTANO

Appraised For: C.S.E. /JOHN CANTO

Condition Code: Good  
 Deductible: 300.00  
 File Number: SJ 0101157  
 Claim Number: 326655

Type of Loss: Collision

Insured: WILLIAM & LARRAINE PYNE

Mitchell Service: 913528

Description: 1997 Dodge GrandCaravan  
 Body Style: Van 119" WB  
 VIN: 2B4GP24R6VR144404  
 Mileage: 87,638  
 Options: V6 OVER 4 CYL

Drive Train: 3.3L Inj 6 Cyl 2WD  
 License: 3TIZ186 CA

Line Item	Entry Number	Labor Type	Operation	Line Item Description	Part Type/Part Number	Dollar Amount	Labor Units
1	300013	REF	REFINISH	FRT UPR BUMPER COVER			C 1.6
2	AUTO	BDY	OVERHAUL	FRT COVER ASSY			2.9 #
3	320224	BDY	REMOVE/REPLACE	FRT BUMPER COVER	4883841AA	345.00	INC #
4	300048	BOY	REMOVE/REPLACE	FRT BUMPER REINFORCEMENT	5011110AA	189.00	INC
5	300049	BDY	REMOVE/REPLACE	FRT BUMPER IMPACT CUSHION	4576607	84.20	INC
6	300446	BOY	REPAIR	L FENDER PANEL	Existing		3.5*#
7	AUTO	REF	REFINISH	L FENDER OUTSIDE			C 1.9
8	900500	BDY *	REMOVE/REPLACE	FLEX ADDITIVE	New	8.00	* 0.0'
9	900500	BOY .	REMOVE/REPLACE	HAZARDOUS WASTE DISPOSAL	Sublet	2.00	* 0.0'
10	900500	REF *	REFINISH/REPAIR	COLOR SAND & POLISH	Existing		0.4'
11	AUTO	REF	ADD'L OPR	CLEAR COAT			1.0
12	933003	REF	ADD'L OPR	TINT COLOR			0.5*
13	933018	REF	ADD'L OPR	MASK FOR OVERSPRAY		5.50	* 0.2*
14	AUTO	REF	ADD'L COST	PAINT/MATERIALS		118.80	*

ESTIMATE RECALL NUMBER: 02/02/2001 15:24:59 SJ 0101157

Mitchell Data Version:  
 UltraMate Version:

JAN-01-A  
 4.6.004

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Page 1 of 3

7-4.12

\* - Judgement Item  
 # - Labor Note Applies  
 C - Included in Clear Coat Calc

I. Labor Subtotals		Unit <sup>9</sup>	Rate	Add'l Labor Amount	Sublet Amount	Totals	II. Part Replacement Summary		Amount
Body		6.4	52.00	0.00	0.00	332.80	Taxable Parts		626.20
Refinish		5.6	52.00	5.50	0.00	296.70	Sales Tax @ 7.750%		48.53
Non-Taxable Labor						629.50	Non-Taxable Parts		2.00
Labor Summary	12.0					629.50	Total Replacement Parts Amount		676.73
III. Additional Costs						Amount	IV. Adjustments		Amount
Taxable Costs						118.80	Insurance Deductible		300.00-
Sales Tax @ 7.75096						9.21	Customer Responsibility		300.00-
Total Additional Costs						128.01	I. Total Labor:		629.50
							II. Total Replacement Parts:		676.73
							III. Total Additional Costs:		128.01
							Gross Total:		1,434.24
							IV. Total Adjustments:		300.00-
							Net Total:		1,134.24

Point(s) of Impact  
 11 Left Front Corner(P)

Inspection Date: 01/30/2001

Body Shop: WATSONVILLE AUTO BODY  
 Address: 107 AIRPORT EL.  
 WATSONVILLE, CA 95019  
 Telephone: (831) 722-6466  
 Fax Phone: (831) 722-7452  
 State Lic. No: 94-1718869

ESTIMATE RECALL NUMBER: 02/02/2001 15:24:59 SJ 0101157

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 UltraMate Version: 4.6.004  
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7-4.13

THIS IS NOT A REPAIR AUTHORIZATION

=====

AUTHORIZATION MUST BE OBTAINED FROM OWNER OF VEHICLE

=====

THIS DOES NOT VERIFY COVERAGE NOR IS AN AGREEMENT  
TO PAY FOR REPAIR

=====

NO SUPPLEMENTS WITHOUT PRIOR APPROVAL

=====

ALL NEW OR REPLACEMENT PARTS SHOULD BE WELDED AT THE FACTORY SEAMS

=====

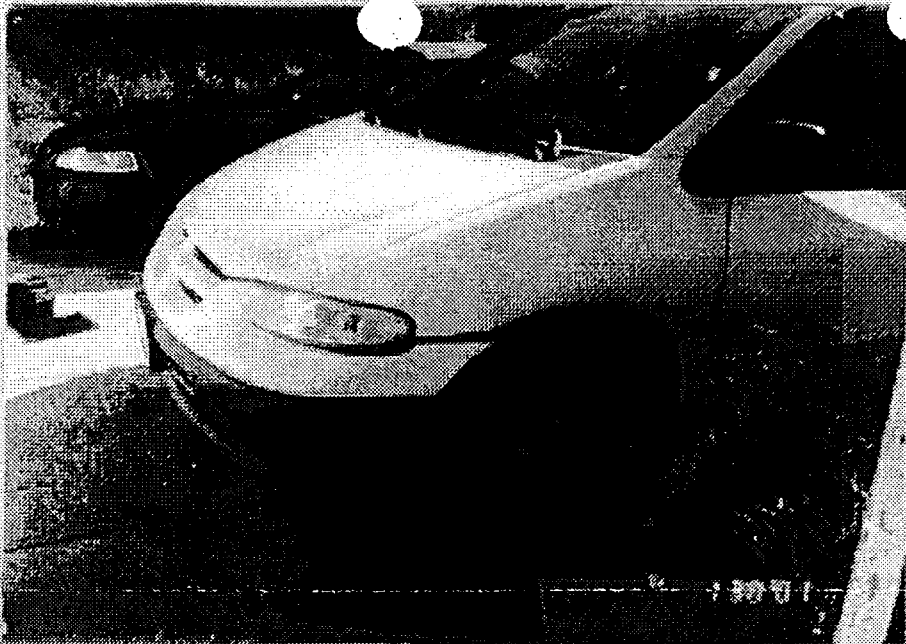
AND IN THE MANNER RECOMMENDED BY THE MANUFACTURER

ESTIMATE RECALL NUMBER: 02/02/2001 15:24:59 SJ 0101157

Mitchell Data Version: JAN\_01\_A  
UltraMate Version: 4.6.004

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7-4.14



7-4.15

# GOVERNMENT TORT CLAIM

## RECOMMENDED ACTION

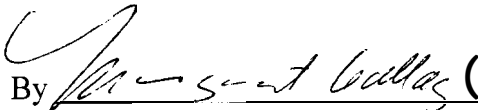
TO: Board of Directors

FROM: District Counsel

RE: Claim of: Michael Roberts Received: 2/13/01 Claim #: 0 1-0003  
Date of Incident: 7/14/00 Occurrence Report No.: SC 07-00-09

In regard to the above-referenced Claim, this is to recommend that the Board of Directors take the following action:

- 1. Deny the claim.
- 2. Deny the application to file a late claim.
- 3. Grant the application to file a late claim.
- 4. Reject the claim as untimely filed.
- 5. Reject the claim as insufficient.
- 6. Approve the claim in the amount of \$\_\_\_ and reject it as to the balance, if any.

By  \_\_\_\_\_

Margaret Gallagher  
DISTRICT COUNSEL

Date: March 1, 2001

---

I, Dale Carr, do hereby attest that the above Claim was duly presented to and the recommendations were approved by the Santa Cruz Metropolitan Transit District's Board of Directors at the meeting of March 16, 2001.

---

Dale Carr  
Recording Secretary

---

Date



CLAIM AGAINST THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

(Pursuant to Section 9 10 et Seq., Government Code)

Claim # 01-0003

TO: BOARD OF DIRECTORS, Santa Cruz Metropolitan Transit District

ATTN: Secretary to the Board of Directors  
230 Walnut Avenue  
Santa Cruz, CA 95060

1. Company Representative's Name/Claimant's Name: Michael S. Roberts

Claimant's Address/Post Office Box: P.O. Box 1261  
Santa Cruz, CA 95061-1261

Claimant's Phone Number: 831 786-8664

2. Address, to which notices are to be sent: P.O. Box 1261  
Santa Cruz, CA 95061-1261

3. Occurrence: Heavily intoxicated and obese man fell off his seat  
and on to my right leg.

Date: 07/14/00 Time: 10:00AM Place: Cabrillo College

Circumstances of occurrence or transaction giving rise to claim: Driver allowed  
very intoxicated man to board bus, and allowed him to remain  
on bus after it came to her attention that he was drinking  
alcohol on the bus (Pennsylvania + Main in Watsonville). She did not  
remove him from the bus until he had fallen on my leg at Cabrillo College

4. General description of indebtedness, obligation, injury, damage, or loss incurred so far as  
is known: Injury to right leg, and in particular, the prosthesis that replaced  
my right knee 12/02/99. Injury sustained 22 days after surgery  
and manipulation (06/22/00) to remove extensive scar tissue.  
I was beginning my sixth day on one forearm crutch, and  
well on my way to full recovery.

5. Name or names of public employees or employees causing injury, damage, or loss, if  
known: Ruth (driver of #91 Express)

6. Amount claimed now ..... \$ 2,500<sup>00</sup> + medical

Estimated amount of future loss, if known ..... \$

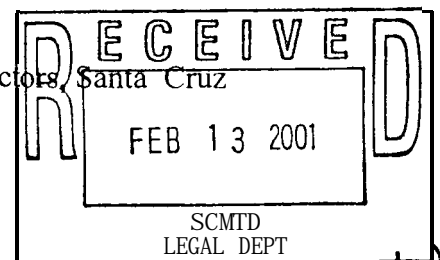
TOTAL ..... \$ 2,500<sup>00</sup> + medical bi.

7. Basis of above computations: Physical and emotional pain and suffering,  
subsequent hospitalizations and procedures, probable replacement  
of prosthesis in February 2001. This incident, which never should have happened, can

Michael S. Roberts  
PARENT'S/CLAIMANT'S SIGNATURE or  
COMPANY REPRESENTATIVE'S SIGNATURE

01/12/01  
DATE

Note: Claim must be presented to the Secretary to the Board of Directors, Santa Cruz  
Metropolitan Transit District



7-4-17

and the injury sustained, has made my life a living hell. All my hard work in physical therapy and all the pain I incurred, was for nothing. My realistic hopes for recovery were dashed. All this is directly attributable to the failure of the driver to perform her duty. I am not asking for the amount of compensation which I believe I should receive because I do not want this dragged out in litigation and I want this matter put to rest, and to get on with my life. I ask that I receive \$2,500<sup>00</sup> in compensation, plus payment of the bills for the ambulance, emergency room care, and for the X-rays taken on 07/14/00.

7-4-18

AIP

6.886



**American Medical Response**

P.O.Box 3429  
Modesto, CA 95353

MICHAEL S. ROBERTS  
15 WEST LAKE #402  
WATSONVILLE CA 95076-4544

|||||

Y

AMERICAN MEDICAL RESPONSE  
FILE 73329-PO BOX 60000  
SAN FRANCISCO, CA 94160-3329

Patient Name: MICHAEL S. ROBERTS  
Account Number: 000305762  
Trip Number: SCR0019656500  
Date of Service: July 14, 2000  
Balance: 697.59

Dear MICHAEL S. ROBERTS:

In reviewing your account we have found that you have an unpaid "share of cost" amount. We are unable to bill Medi-Cal until your share of cost has been met. If you have any questions regarding your share of cost please contact our office, or your Medi-Cal Social Worker.

Thank You,  
Patient Business Services  
(800)913-9106 or (209)238-4710

sc1

7-4.19

A  
M  
R  
O  
3  
W  
E



Dominican Hospital

CHW

Dominican Hospital  
1555 Soquel Drive  
Santa Cruz, CA 95065  
831 462 7700 Telephone

Dominican  
Rehabilitation Services  
610 Frederick Street  
Santa Cruz, CA 95062

Patient Name: Michael Roberts

Account Number: 33391947

Month of Service: July

Charges for your visit on 7/14/00 are \$ 295.66 Share of  
Cost for July is \$ 305.00 you owe \$ 295.66 for this visit.

Please send payment in full in the enclosed envelope or make your payment in the Business Office between 8 AM and 5 PM Monday through Friday. Be sure to put your account number on your check or money order. If you have any questions or need to make payment arrangements please call our office between 9 AM and 4 PM Monday through Friday at 462-7701 and we will be happy to assist you. Thank you.

*Angie Allen*  
(patient service rep.)

7-4-20

**MAKE CHECKS PAYABLE TO:**

RADIOLOGY MEDICAL GROUP  
 1661 SOQUEL DR STE G  
 SANTA CRUZ CA 95065-1709

Forwarding Service Requested

IF PAYING BY CREDIT CARD, FILL OUT BELOW

CHECKCARD USING FOR PAYMENT  **Y4**

CARD NUMBER \_\_\_\_\_ AMOUNT \_\_\_\_\_

SIGNATURE \_\_\_\_\_ EXP DATE \_\_\_\_\_

STATEMENT DATE	ACCOUNT BALANCE	MINIMUM PAYMENT	ACCOUNT NUMBER
08/08/00	R 35.00	R 20.00	001 771362

BUSINESS: 831-476-1542 SHOW AMOUNT PAID HERE \$  
 APPOINTMENT: 831-476-7711

RADIOLOGY MEDICAL GROUP  
 1661 SOQUEL DR STE G  
 SANTA CRUZ CA 95065-1709

\*\*\*\*\*AUTO\*\*5-DIGIT 95076  
 00002781 1 AV 0.243 01  
 ROBERTS, MICHAEL  
 15 W LAKE AVE APT 402  
 WATSONVILLE CA 95076-4544



Please check box if your address is incorrect or insurance information has changed. Indicate change(s) on reverse side.

**STATEMENT**

PLEASE DETACH AND RETURN TOP PORTION WITH YOUR PAYMENT

DIAG CODE	DATE	DR. NO.	PATIENT NAME	P S	SERVICE CODE	SERVICE RENDERED	AMOUNT
ICD9					CPT- 4	PREVIOUS BALANCE ◊	
2411 9179 8498	71400037		MICHAEL	2	73562.26	KNEE, MIN 3 VWS/OBLIQUE Referring Phy: W RICHARD HENCKE, MD Hospital: DOMINICAN HOSPITAL E New Ending Balance---->	35.0  35.0
OUR POLICY REQUIRES A MINIMUM PAYMENT OF \$20.00 OR 20% OF BALANCE, WHICHEVER IS THE LARGER.							
RADIOLOGY MEDICAL GROUP: SANTA CRUZ BILLING OFFICE 476-1542 AND WATSONVILLE BILLING OFFICE 724-2236. YOU ARE RESPONSIBLE FOR THIS BILL. WE DO NOT HAVE ANY INSURANCE INFORMATION ON YOUR ACCOUNT. PLEASE CONTACT 476-1542, IF YOU HAVE INSURANCE AND WOULD LIKE US TO BILL FOR YOU.							
ACCOUNT NO.	CLOSING DATE	CURRENT	31-60 DAYS	61-90 DAYS	91-120 DAYS	OVER 120 DAYS	Last Amount In this Column (our New Balance)
001 771362	08/08/00	35.00					

REBILL FEE \$ 3.00 MONTHLY ON BALANCES OVER 90 DAYS.

37 NICHOLAS ASTROMOFF,  
 7-4-21

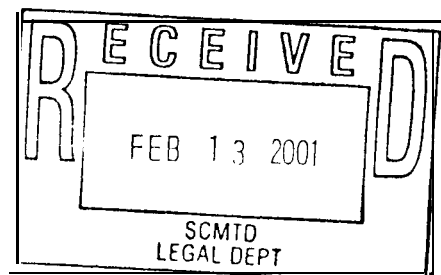
02/08/01

To whom it may concern:

On January 13, 2001 I mailed a completed claim form with attachments to the Secretary of the Board of Directors at the address indicated on the information sheet. Yesterday, 3 1/2 weeks after mailing my claim, it was returned to me because your forwarding order had expired. A supervisor, Donna, at Santa Cruz Metro, spoke with someone from risk management, and Donna advised me to place the original mailing along with this note in another envelope and mail it to your current address. Had the address on the information sheet been correct, you would have received my claim in a timely manner.

Sincerely,

Michael J. Roberts



7-4.22

METRO ACCESSIBLE SERVICES TRANSIT FORUM (MASTF)\*  
(\* An official Advisory group to the Metro Board of Directors  
and the ADA Paratransit Program)

MINUTES

The Metro Accessible Services Transit Forum met for its monthly meeting on February 15, 2001 in Room 223 of the University Town Center, 1101 Pacific Avenue, Santa Cruz CA.

MASTF MEMBERS PRESENT: Sharon Barbour, Scott Bugental, Michael Edwards, Kasandra Fox, Mark Hartunian, Michelle Hinkle, Katherine June, Clay Kempf, Ed Kramer, Deborah Lane, Jeff LeBlanc, Fahmy Ma'Awad, Mimi McFadden, Thom Onan, Dennis Papadopulo, Gary Peterson, Barbara Schaller, Patricia Spence and Richard Weiner.

METRO STAFF PRESENT:

Bryant Baehr, Operations Department Manager  
Kim Chin, Planning and Marketing Department Manager  
John Daugherty, Accessible Services Coordinator  
Mary Ferrick, Transit Supervisor  
Linda Garbez, S.E.I.U. Representative  
David Konno, Facilities Maintenance Department Manager  
Ian McFadden, U.T.U. Representative  
Kathy O'Mara, Schedule Analyst  
Tom Stickel, Fleet Maintenance Department Manager  
Les White, General Manager

BOARD MEMBERS PRESENT:

Michelle Hinkle

**\*\*\* MASTF MOTIONS RELATED TO THE METRO BOARD OF DIRECTORS**

- 1) MASTF approves of Recommendation #8 (contracting out recertification eligibility screening) presented by the paratransit recertification consultants.
- 2) MASTF approves of Recommendations #1-#7 presented by the paratransit recertification consultants.
- 3) MASTF supports that:
  - a) METRO continues selling green prepaid paratransit ride coupons until a permanent alternative can be devised.
  - b) METRO avoid making drastic changes to the present methods until the Audit/Recertification is completed and changes approved by the Santa Cruz Board.
- 4) MASTF approves of the proposed bus route service changes.

RELEVANT ATTACHMENTS: None.

**\*MASTF MOTIONS RELATED TO METRO MANAGEMENT**

MASTF supports that:

- a) METRO continues selling green prepaid paratransit ride coupons until a permanent alternative can be devised.
- b) METRO avoid making drastic changes to the present methods until the Audit/Recertification is completed and changes approved by the Santa Cruz Board.

I. CALL TO ORDER AND INTRODUCTIONS

Chairperson Kasandra Fox called the meeting to order at 2:06 p.m. She noted that she would move the meeting along rapidly so that the major business item would be covered. She asked those present to speak up so that her hearing aid and the meeting tape recorder will capture their comments.

II. APPROVAL OF THE JANUARY 18, 2001 MASTF MINUTES

Patricia Spence offered two corrections:

- Discussion noted under Agenda item 5.1, "Paratransit Update", had two inaccuracies. On Page Four of the Minutes it is noted that Ms. Spence "has been involved with paratransit service since September 1997." Ms. Spence clarified that she has been involved in paratransit service since September 1998.
- On Page Six it is noted that Ms. Spence "believed that Lift Line could provide service in a more expedient manner" than the taxi companies. Her correction points out that she said that the audit was requiring the taxi companies to do so much record keeping, mileage and other things. "It's almost like the private taxi companies are being absorbed by Lift Line," she stated, "So I really said ... it would be faster for Lift Line to perform the service themselves rather than doing all the monitoring and things that are being required by the audit."

**MASTF Motion: That the January 18, 2001 MASTF Minutes be approved as corrected.**

**M/S/PU: Papadopulo, Barbour**

III. AMENDMENTS TO THE AGENDA

Ms. Fox reported that Bryant Baehr had requested that discussion of proposed bus route service changes be added to today's Agenda. The METRO Board would vote the proposed changes on tomorrow. She added that she would entertain a Motion to add that discussion to the Agenda as an emergency item.

**MASTF Motion: Discussion of proposed bus route service changes is added to the Agenda as an emergency action item.**

**M/S/PU: Barbour, Lane**

IV. ORAL COMMUNICATION AND CORRESPONDENCE

Ms. Spence read aloud a Proclamation from the Santa Cruz County Board of Supervisors to John Daugherty. The Proclamation was signed by Board Chairman Tony Campos last month on behalf of members of the Board and the County Commission on Disabilities who "do hereby thank, honor and



commend John Daugherty for his continued commitment to a community free of barriers to independent living for persons with disabilities in Santa Cruz County.”

V. ONGOING BUSINESS

5.1 Paratransit Update

a) Review of ADA Paratransit Recertification Proposals (Richard Weiner)

Richard Weiner, of Nelson/Nygaard Consulting Associates, distributed copies of a “boiled down” summary (Attachment A) of eight recommendations on paratransit recertification. He noted that the presentation today of the recommendations is “the last opportunity I have to hear from you all.”

He recalled that last Friday the METRO Board agreed on seven out of eight recommendations, or “elements”, presented. The eighth recommendation --- to decide who is actually going to be responsible for certification -- divided the Board.

Highlights of issues raised during discussion included:

- Thom Onan asked Mr. Weiner for an estimate of the number of people that will undergo recertification. Mr. Weiner estimated that between 4,000 to 6,000 persons would start the process. Mr. Weiner believed that number range of people could be processed within one year. Mr. Onan questioned that time estimate; Mr. Weiner confirmed his response. Kim Chin noted that the primary objective for certification is to handle the process “in a measured way.” He added that the recertification process could take 12 to 24 months due to the presentation of transportation options and other factors.
- Mr. Weiner noted that one of the recommendations calls for all persons who want to be certified eligible for paratransit to come in for an in person interview. He opened up discussion of the “hardship cases”, persons who would not be required to come in for an interview to be certified eligible for paratransit. He estimated that “a very small number of people” would be exempted from the interview requirement, for example persons living with mental disabilities or persons who would experience the ride to the interview as painful. Scott Bugental noted that some persons, even with the best equipped vans available, would experience a ride to and from an interview site as painful. Mr. Daugherty noted that some persons were eligible for paratransit, such as residents of the skilled nursing facility Pleasant Care, but those persons do not have off site attendants available. Dennis Papadopulo noted that Pleasant Care residents also have very low incomes (an average of 80 cents a day per person) that make the cost of paratransit trips another barrier to paratransit use.
- Ms. Fox noted that people were not speaking up and that her hearing aid was not working. She appointed Deborah Lane as chairperson for the remainder of the meeting.
- Another recommendation described by Mr. Weiner was the replacement of 30-day temporary eligibility with “immediate need certification.” “In the community,” he observed, “this is rated a high value.” He pictured that immediate certification would be granted for some persons for about one week to allow time to begin the certification process. “Nobody will fall through the cracks this way,” he noted.

- Ms. Spence raised concern that METRO would lose control of eligibility determinations if there were several assessors working at several interview sites. Mr. Onan noted that have one assessor rotating to several sites could address that concern.

Mr. Bugental noted that MASTF members could review the recommendations from the Elderly and Disabled Transportation Advisory Committee (E&D TAC) to discover where MASTF agreed with that group. He circulated copies of E&D TAC recommendations (Attachment B) and noted that where both groups are “in alignment” it is useful to the process.

- Ms. Spence asked if certified paratransit riders would receive a Photo ID Card. Mr. Weiner responded that arranging for on the spot Photo ID was being discussed. He also noted that persons being interviewed could get information on other services available to them.
- Mr. Papadopulo brought up the issue of subsidies for paratransit eligible persons with very low incomes, such as Pleasant Care residents. Mark Hartunian noted that there are multiple funding sources available that might assist transportation needs. Jeff LeBlanc pointed out that this is an ongoing issue that has not been resolved in MASTF. Mr. LeBlanc noted that MASTF, in the past, has been interested in having a limited number of people granted a fee waiver. He believed the time was right to have METRO consider supplementing what exists for persons with very low incomes.
- Ms. Lane had two comments to share with the group. First, she asked what would happen to the green prepaid paratransit ride coupons issued by Lift Line. Mr. Hartunian responded that he would share information during his ADA Paratransit Report later on the Agenda.
- “It’s important for METRO to take longer than a year to recertify people so as to prevent any abuses of paratransit customers and to improve the infrastructure at METRO,” Ms. Lane also commented, “By infrastructure I mean bus stop construction where we have inaccessible bus stops. Our one accessible apartment house (the *Dakota* in Capitola) still has an inaccessible bus stop in front of it, so that people are using paratransit and not taking the bus. Driver training needs to be upgraded and we need to start improving the quality of life at the Metro Centers, get rid of the drug dealers and the panhandlers.”

Mr. Weiner responded that an inaccessible bus stop is one of the criteria for paratransit eligibility. He also noted that improvements in mobility training opportunities and public education about fixed route accessibility are included in consultant recommendations.

- Clay Kempf shared one item that caused a great deal of concern at the E&D TAC meeting last Tuesday. A directive had been sent by METRO to Lift Line to suspend the 30 temporary eligibility process as of March 7<sup>th</sup>. Mr. Kempf was concerned that the METRO Board was considering moving forward on that single item “without taking into account any of the rest of the process.”

Mr. Hartunian responded that the directive he received called for no further booking of rides for persons who have exceeded their 30-day temporary status as of March 7<sup>th</sup>. All trips booked before March 7<sup>th</sup> will be honored. New applicants continue to have the 30-day temporary eligibility privilege. “There is no intention to make modification to the 30 day issue,” Les White confirmed, “What we found in the audit ... there were people who have 30 day temporary certification that have been riding for five or six years, which seemed like a stretch from the 30 day limit.” He noted that

METRO is committed to a quick turn around time once applications for paratransit service are received.

- There were different opinions on who should implement recertification. For example, Ian McFadden, representing the United Transportation Union (UTU) Local 23, noted that his union supports METRO performing recertification duties. From a legal and financial standpoint, he noted, “It is important for METRO to have a hands on approach.” Barbara Schaller and Ms. Fox agreed that METRO could hire the right people for the job. Mr. Weiner believed that METRO was best served by contracting out this non-transportation function.

The following two Motions to the Board emerged from discussion:

**MASTF Motion: MASTF approves of Recommendation #8 (contracting out recertification eligibility screening) presented by the paratransit recertification consultants.**

**M/S/C: Spence, Ma’Awad (5 in favor, 3 opposed, 4 abstentions)**

**MASTF Motion: MASTF approves of Recommendations #1-#7 presented by the paratransit recertification consultants.**

**M/S/C: Spence, Fox (one abstention)**

Ms. Spence shared another paratransit-related issue with the group. When she travels, she carries only the money she needs to carry. She noted that having green prepaid paratransit ride coupons assists her use of paratransit. She noted that METRO appeared ready to halt distribution of prepaid coupons. She introduced a Motion to continue the use of the coupons. She shared a petition from 84 Stroke Center supporters that calls for retention of prepaid coupons. She pointed out that the Americans with Disabilities Act (ADA) requires that paratransit service is similar to fixed route bus service. Fixed route bus service customers are offered the chance to buy 15 punch prepaid Convenience Cards. “If you take away our ability to pre pay for our rides,” Ms. Spence stated, “it is not a comparable service.”

Discussion of the Motion included Mr. Hartunian’s comments that he supported the “coupon based privilege.” He also noted that Lift Line yields to the discretion of METRO on the issue. Mr. Chin stated that METRO is working with Lift Line to have a transition plan for the coupons in place by March 7<sup>th</sup>.

The following two part Motion to METRO Board and Management concluded discussion:

**MASTF Motion: MASTF supports that:**

- METRO continues selling green prepaid paratransit ride coupons until a permanent alternative can be devised.**
- METRO avoid making drastic changes to the present methods until the Audit/Recertification is completed and changes approved by the Santa Cruz Board.**

**M/S/C: Spence, Edwards (two abstentions)**

- ADA Paratransit Report (Mark Hartunian)**

This item was moved to the end of the Agenda, just prior to Adjournment. Mr. Hartunian reported:

- The audit by MultiSystems suggested that Lift Line could recognize over 300 paratransit trip turndowns per month. From December 1, 2000 through today (February 15, 2001) Lift Line has documented one turndown.
- Lift Line has proposed a paratransit trip rate reduction plan to METRO. Mr. Hartunian described the working relationship with METRO as “very successful.”
- He is “optimistic” about the negotiations coming up between Lift Line and the UTU.
- If Lift Line performed 50% of the paratransit trips, the audit estimates, the cost per ride would be \$22.52. Mr. Hartunian reported that the current cost per ride is \$21.27.
- Lift Line will “yield to the discretion of METRO insuring that we protect the interest of all of the participants and that we follow the procedural guidelines as they are established by METRO.”

c) Transportation Advocacy (Thom Onan)

This item was tabled due to time constraints.

5.2 MASTF Election: Bus Stop Improvement Committee Chairperson

5.3 MASTF By Law Amendment Review and Election: Paratransit Services Committee Chairperson

Ms. Lane noted that there was a proposal to amend the MASTF By Laws by adding the position of Paratransit Services Committee Chairperson to the MASTF Executive Committee. She read aloud the proposed job description:

“Paratransit Services Committee Chairperson

The Paratransit Services Chairperson and MASTF committee members will work on projects related to paratransit services (e.g.; review of eligibility screening for paratransit, quality of service delivered) and will make recommendations accordingly. The Paratransit Services Chairperson has the specific responsibility to represent MASTF and its policy decisions and recommendations.”

The following Motion to MASTF membership was approved:

**MASTF Motion: MASTF approves the creation of the Paratransit Services Committee Chairperson position and its job description.**

**M/S/C: Fox, Papadopulo (two abstentions)**

Mr. Daugherty facilitated the elections for two MASTF Executive Committee positions: Bus Stop Improvement Committee Chairperson and Paratransit Services Committee Chairpersons. He noted that persons elected to the positions serve until the MASTF Executive Committee elections in November.

**One person accepted nomination for each position. By acclamation the new Chairpersons are:**

**Bus Stop Improvement Committee Chairperson: Dennis Papadopulo (Moved/Second/Accepted: Lane, Edwards/A)**

**Paratransit Services Committee Chairperson: Patricia Spence  
(M/S/A: Papadopulo, Lane/A)**

“Thank you for giving me your confidence,” Ms. Spence shared, “I really look forward to giving the perspective from the other part of the group here, the bus riders as well as the disabled people who use Lift Line.”

5.4 MASTF Recommendation: Consideration of Bus Service Priorities

This item was covered during discussion of the proposed bus route service changes discussed under “New Business” below.

VI NEW BUSINESS

6.1 Discussion of Proposed Bus Route Service Changes

Mr. Baehr introduced METRO staffpersons Mary Ferrick, Kathy O’Mara and Mr. McFadden. With Mr. Baehr they described proposed bus route service changes being presented to the METRO Board tomorrow for approval. Mr. Baehr noted that the cost of the service improvements was \$522,000.

The proposed service improvements (that could take effect on March 29<sup>th</sup>) were:

- 1) Additional trips of the Route 71 bus service to handle delays and overloads. Five trips could be added in the afternoon. The routing of some trips could be designed so the Route 71 serves those residents in the Green Valley Road and Pennsylvania area.
- 2) Routes 2, 3A and 3B could change from once every two hours to hourly service on weekends. These changes would serve Westside residents and allow the Live Oak routes interlined with Routes 2, 3A and 3B to adjust running times.
- 3) Service between UC Santa Cruz (UCSC) from downtown Santa Cruz could be expanded. Two routes travelling between UCSC and the Westside could be added. Frequency of bus trips could be increased to assist students whose classes begin at 11 a.m. and 2 p.m. The round trip travel time between UCSC and the Santa Cruz Metro Center could be changed from 45 minutes to one hour for some trips to compensate for traffic delays.
- 4) More Route 69W service could be added on the weekends. This added service could replace service that has left customers traveling to Watsonville stranded at the Capitola Mall.
- 5) Service provided by the Highway 17 Express could be expanded. Three trips that travel round trip between the Soquel Avenue Park & Ride and San Jose could be added. This would change the current situation that the earliest afternoon departure from San Jose back to the Soquel Avenue Park & Ride is at 4:10 p.m. It could be possible to leave San Jose at 3 p.m. to reach the Soquel Avenue Park & Ride if that service improvement is approved by the METRO Board. There would also be more service from the Soquel Avenue Park & Ride back to San Jose.

Comments on the proposed service improvements included:

- Fahmy Ma' Awad stated that it was very important to him that bus service exists on holidays. Mr. Baehr noted that service on three holidays (Martin Luther King Day, Presidents' Day and Memorial Day) had been restored since he came to METRO. Mr. Ma' Awad noted that bus service on Thanksgiving Day would assist all bus riders, not just persons with disabilities. Mr. Baehr noted that he had \$1.9 million worth of service requests (that includes holiday service) before him and only about \$500,000 to work with. Mr. McFadden noted that he was working on "service remediation" and hoped that service that had been cut years ago could be restored later this year. He also noted that METRO had never run service on Thanksgiving.
- Ms. Schaller wanted to remind everyone how important the Fourth of July is. She recalled that the attendance of seniors at the Harvey West Fourth of July picnic last year dropped by hundreds because there was no bus service available unlike the year before. "Don't overlook the seniors," she shared, "we're powerful."

Ms. Schaller also asked if the hourly service to Harvey West could become more frequent. Mr. Baehr responded that service every half-hour might be possible in the future. "I ride the (Route 4) Harvey West just about every day," he shared, "Is it busy? Not as busy as I would like. Is the Route 71 more important than the Route 4 right now? Yes."

- Michael Edwards noted that all the improvements being discussed today were additions to existing service. As a six to seven day a week rider of the Route 71, he appreciated the improvements. "We're stepping in the right direction," he stated, "It's just a matter of priorities."

The following Motion to the Board concluded discussion:

**MASTF Motion: MASTF approves of the proposed bus route service changes.**

**M/S/PU: Spence, Barbour**

- 6.2 U.T.U. Report
- 6.3 S.E.I.U. Report (Linda Garbez)
- 6.4 Next Month's Agenda Items

These three items were tabled due to time constraints. The "ADA Paratransit Report" was the last business item prior to Adjournment.

## VII ADJOURNMENT

**The meeting was adjourned at 4:10 p.m.**

**M/S/PU: Spence, Edwards**

**NOTE: NEXT MAST MEETING IS: Thursday March 15, 2001 from 2:00-4:00 p.m., in Room 223 of the University Town Center, 1101 Pacific Avenue, Santa Cruz, CA.**

MASTF Minutes  
February 15, 2001  
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NOTE: NEXT S.C.M.T.D. BOARD OF DIRECTORS MEETING IS: Friday March 9, 2001 at 8:30 a.m. at the S.C.M.T.D. Administrative Offices, 370 Encinal Street in Santa Cruz, CA.

NOTE: THE FOLLOWING S.C.M.T.D. BOARD OF DIRECTORS MEETING IS: Friday March 16, 2001 at 9:00 a.m. at the Santa Cruz City Council Chambers, 809 Center Street, Santa Cruz, CA.

# Santa Cruz Metropolitan Transit District

Minutes-Metro Users Group

February 14, 2001

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The Santa Cruz Metropolitan Transit District Metro Users Group met at 2:10 p.m., Wednesday, February 14, 2001, at the District's Encinal Conference Room, 370 Encinal Street, Suite 100, Santa Cruz.

## **MEMBERS PRESENT**

Bruce Gabriel, Chair  
Sharon Barbour, MASTF  
G. Ted Chatterton, Transit User  
Sandra Coley, Pajaro TMA  
Cliff Nichols, Cabrillo College  
Michelle Hinkle  
Barbara Schaller  
Carolyn O'Donnell, Santa Cruz TMA  
Candice Ward, UCSC

## **VISITORS PRESENT**

Richard Weiner, Nelson/Nygaard  
Consulting Associates

## **SCMTD STAFF PRESENT**

Bryant Baehr, Operations Manager  
Kim Chin, Planning & Marketing Mgr.  
Mary Ferrick, Transit Supervisor  
Tom Stickel, Fleet Maint. Manager  
David Konno, Facilities Maint. Mgr  
Kathy O'Mara, Schedule Analyst

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## **MUG RESOLUTIONS TO METRO BOARD OF DIRECTORS**

1. MUG supports the Nelson/Nygaard Consultants recommendations #1 through 8 of the ADA Paratransit Certification Project.
  2. MUG agrees with the Service Review Committee's proposed service improvements for Spring 2001.
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## **MUG RESOLUTIONS TO METRO MANAGEMENT**

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1. **CALL TO ORDER AND INTRODUCTION**
2. **ADDITIONS AND DELETIONS TO THE AGENDA**

None.



### **3. ORAL AND WRITTEN COMMUNICATIONS AND ANNOUNCEMENTS**

Ted Chatterton stated that he objects to the advertising ads covering the windows on the buses. He indicated that it is hard to see out the windows. Bryant Baehr stated that the Board several months ago restricted the advertising to no more than 1 or 2 inches above the windows. The only bus that currently has advertising on the windows is the Beach Shuttle. He stated that the City of Santa Cruz paid for the advertising on the Beach Shuttle.

### **4. CONSENT AGENDA**

**ACTION: MOTION: Sharon Barbour SECOND: Ted Chatterton**

Approve the following items accepted by the Committee:

- a) Receive and Accept January Meeting Minutes:  
(Attached)
- b) Monthly Attendance Report  
(Attached)
- c) Review of Minutes of Board of Directors Meeting  
(Attached)
  
- d) Review of Board meeting Agenda Items:
  - 1. Quarterly Performance Report
  - 2. Quarterly Ridership Report

**The committee voted unanimously with Carolyn O'Donnell and Sandra Coley abstaining.**

### **5. ON-GOING ITEMS**

#### **5a) Review of Headways Redesign Issues**

Kim Chin reported at last month's meeting he indicated that Metro is in the process of working with the graphic designer. They will be looking at incorporating some of the design changes in the issue of Headways which, would be the summer issue. In the spring issue, the service changes will be delayed two weeks to March 29, 2001. With the fall issue they will be looking for more additions and changes, depending on the availability of funds. This would include a system map, which MUG members and others felt that a system map would be very useful. Metro will try for the Fall issue. They also want to make it easier for people to read. They will look at color coding the routes so that you would look for a certain color for a specific route. For example, all commuter routes would be one color, all the cross county routes a different color, all UCSC

routes a different color, inter-city routes another color, etc. He will give updates when more information is available.

### **5b) Service and Planning Update**

Bryant Baehr introduced Mary Ferrick, Transit Supervisor and Kathy O'Mara, Schedule Analyst. They will be talking about the service changes that are being proposed to the Board of Directors on Friday. The Service Review Committee, which includes members of customer service, bus operators, planning and marketing discuss ways to see where service is needed. The Service Review Committee has come up with a proposal of additional service, which is going to the Board for their approval. The cost of this additional service is \$522,000.

#### **Route 71**

Kathy O'Mara reported that the Route 71 is a historic route. It has been around a very long time, is very popular, and well patronized seven days a week. The last five years the Service Review Committee has been looking at how to restore service ever since the 1989 earthquake. Service was reduced by 30% in the early 90s and further reduced service in 1993/1994. One of these was the Route 71, it ran four times an hour prior to the earthquake. In the mid-1990s, the District implemented the Route 70, which was half of a Route 71. It circulated between Santa Cruz and Cabrillo College.

With the availability of funds and increased ridership, the District is going to take the Route 70, from 12:00 p.m. and extend them out to Watsonville and reintegrate them into Route 71 service. The Route 71s will be running every 15 minutes up until 6:15 p.m. when they return to their night time schedule. In the reverse direction in Watsonville, they will run every 15 minutes from 3:40 p.m. until 6:10 p.m. With these new trips these routes will bring service to the Pennsylvania area between Green Valley and Main streets once an hour. A lot of people in the Watsonville area use these as local routes and this is actually an addition of local service to the Watsonville area.

#### **Routes 2, 3A, 65, 66, 67:**

Mary Ferrick reported that currently in Headways there is additional running time schedule change in the afternoons for the 65,66, 67 in order to allow them for on-time performance. With this new proposal, on the weekends the 2-Western Drive and Mission 3A, they will run every hour, whereas before it was every other hour. These routes are now going to be interlined with the 65, 66, and 67, so you can travel from the Westside through the Capitola Mall. It will also mirror the current Monday through Friday schedule to seven days a week.

Currently in the schedule this particular interlining for the route 65,66, 67 happens at 3:00 p.m. in the afternoons. These are heavy utilized routes between

Santa Cruz and Capitola Mall. They run 10 to 15 minutes late. With this new schedule this has been pushed back to 12:00 p.m. and will make the schedule more consistent. The purpose of this proposal is on-time performance in the peak hours and more service on the Westside to the Capitola Mall.

### **Route 69**

Bryant Baehr stated that on the Route 69 to Watsonville, on the weekends, the 7:37 p.m. and 8:37 p.m. trips leaving Metro Center ends at Soquel and Daubenbiss and heads back to the yard. Every night there are passengers wanting to go to Watsonville, but didn't look at the schedule and the bus drops them off at Soquel and Daubenbiss and have to wait for the Route 71. In this new proposal the Route 71s are being extended out.

### **Route 1**

The Route 1, Westside, was the route that was developed in combination with UCSC. The District looked at designing a route that would attract staff, faculty and students, figure out where students and faculty live and how they could put a route there. The bus carries 44 passengers per hour. They would test this route, put it in Headways and see what happens from there. Two additional trips were added, a 10:23 a.m. and 1:23 p.m. The District added 12 hours of additional service to deal with the Mission Street widening construction project due to heavy delays on Mission Street. Construction on High Street will start within the next 4 weeks. The additional 12 hours of service will be tested for the Spring bid only and will be reviewed again in the Fall.

### **Highway 17**

Bryant Baehr reported that on Highway 17 service, additional trips were added going to the Soquel Park n Ride. He stated that there are people who go to work early in the morning, that take the 4:40 a.m. or 5:10 a.m., trip. If you want to get back around 2:30 p.m. in the afternoon, you can't. You would have to take 3:50 p.m. trip to get back to the Soquel Park and Ride. The 3:00 p.m., 3:25 p.m., and 3:50 p.m. trips were added to serve the Soquel Park and Ride, as well as a 7:30 a.m. trip. A 4:25 p.m., 5:00 p.m. and 6:15 p.m. trips heading over Highway 17 was added for people who would like to go to dinner and to build up some reverse commute.

## **CHAIRPERSON GABRIEL TOOK ITEM 6A OUT OF ORDER IN ORDER**

### **6a) ADA Recertification/Audit**

Chairperson Gabriel introduced Richard Weiner, consultant from Nelson Nygaard. Mr. Weiner reported that he presented recommendations on the ADA Paratransit Recertification to the Board last week. The Board accepted seven out of the eight recommendations. Mr. Weiner stated that there are a number of

recommendations that still needs input from MUG, MASTF and E&D TAC. He distributed a memo with the eight recommendations for MUG members to review. He indicated that he would like to read through the recommendations first and then get any input or comments from the group.

Mr. Weiner reported that he has found significant problems with the eligibility recertification process. There is no real screening that takes place and never has been. Basically, anybody that has applied got into the system. If someone is not eligible for paratransit it is a serious problem for the agency and the District will be taking a closer look at this. Mr. Weiner looked at different models for certification in other parts of the country, especially in medium and larger systems and he felt that the District go towards the in-person assessment. The person would come in and fill out an application form and get the doctor or medical person sign it and send it in. There was lengthy discussion regarding Recommendation #6, the renewal process, a form to be filled out, use a post card size form, or a phone call.

Sandra Coley suggested a small card for database information.

Mr. Weiner asked the group if they felt that there should not be any paperwork and that a phone call would be sufficient.

Sharon Barbour stated that it could be particularly hard for people who have visual problems. A post card is a little hard to read.

Mr. Weiner stated that they could make an exception for people with visual disabilities.

Michelle Hinkle stated that she has recently done this over the phone. What they do is take your information over the phone, they send you the paper work, have someone read it to you, sign it and mail it back. It's all done over the phone.

There was discussion on the 30-day temporary eligibility certification. It was noted that persons that have received the 30-day temporary eligibility have been using it for as long as six months or longer. There are people who are getting this service who do not qualify for this program.

Kim Chin stated that the Board is very interesting in making sure that the District provide options for all the passengers, rather they be fixed route passengers or ADA passengers. Service will not be cut off without providing them with some other option or alternative. The 30-day temporary eligibility is not a huge issue, if the eligibility is confined within 30 days. There are currently 900 people who have been taking rides for years. This is where the problem is. Metro staff wants to keep the 30-day eligibility as it is until March 7, 2001, when the Board will then

provide the contractor with direction. Those who are trying to book rides beyond the March 7<sup>th</sup> deadline are advised to contact Metro directly, so that they can go through the eligibility determination process. Over the past two weeks, there have about a dozen people calling Metro for eligibility. ADA gives you 21 days to determine eligibility for ADA. The District turns those around same day.

Mr. Weiner stated that the current 30-day eligibility be eliminated and that a mechanism would be put in place for specific situations and that there will be an opportunity to waive that requirement.

Sandra Coley asked how many people does the District enter on a monthly basis. Kim Chin reported that 10 to 20 a day enter the system. He indicated that in the history of the program, people have never been denied.

Mr. Weiner indicated that there has not been a decision on Recommendation #8. What they are recommending is that this function of eligibility certification should be contracted out to an agency that has rehab professionals on staff in credibility and the disability community. Someone with rehab experience can tell how the person is functionally able to use the bus. There are many agencies out there, senior centers. Staff may need to train them on the requirements of the ADA. The issue is whether they can assist someone's functional ability and believes that transit staff are not in a position to do that. Mr. Weiner stated that prior to coming to Santa Cruz to do this project, in Reno, Nevada, there is an Independent Living Center who does this function. They are in the business of trying to integrate people, mainstream people with disabilities.

**ACTION: MOTION: Ted Chatterton                      SECOND: Carolyn O'Donnell**

**MUG supports the Nelson/Nygaard Consultants recommendations #1 through 8 of the ADA Paratransit Certification Project.**

The committee voted unanimously with Sharon Barbour voting no.

Chairperson Gabriel stated that he is very impressed with the consultants for their work on this project.

Mr. Weiner thanked Chairperson Gabriel and stated that he has really enjoyed working on this project particularly because Metro has involved the community and working with them.

**Due to the lengthy discussion on this item, the rest of the items are deferred until next month.**

**5c) Marketing**

**5d) Cabrillo College**

**5e) Bus Procurement**

**6. UPDATES**

**6b) Bus Stop Signs**

**7. NEW BUSINESS**

**8. OPEN DISCUSSION**

**9. ADJOURNMENT**

The meeting adjourned at 3:50 p.m.

Respectfully submitted,

DEBBIE GUERRERO  
Administrative Secretary

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001  
**TO:** Board of Directors  
**FROM:** Elisabeth Ross, Manager of Finance  
**SUBJECT: MONTHLY BUDGET STATUS REPORT FOR JANUARY 2001, AND APPROVAL OF BUDGET TRANSFERS**

## I. RECOMMENDED ACTION

**Staff recommends that the Board of Directors approve the budget transfers for the period of February 1 - 28, 2001.**

## II. SUMMARY OF ISSUES

- Operating revenue for the year to date totals \$16,558,047 or \$660,531 over the amount of revenue expected to be received during the first seven months of the fiscal year, based on the budget revised in January.
- Total operating expenses for the year to date, including grant programs, in the amount of \$14,982,141, are at 49.7% of the revised budget. Day to day operating expenses total \$14,645,363 or 50% of the revised budget.
- A total of \$1,212,076 has been expended through January 31<sup>st</sup> for the FY 00-01 Capital Improvement Program.

## III. DISCUSSION

An analysis of the District's budget status is prepared monthly in order to apprise the Board of Directors of the District's actual revenues and expenses in relation to the adopted operating and capital budgets for the fiscal year. The attached monthly revenue and expense report represents the status of the District's FY 00-01 budget as of January 31, 2001. The fiscal year is 58.3% elapsed.

### A. Operating Revenues

Revenues are \$660,531 over the amount projected to be received for the period. Sales tax revenue is \$602,815 ahead of budget projections as of January 31<sup>st</sup> due to a higher quarterly wrap-up payment than projected in December. Variances are explained in the notes following the report.

### B. Operating Expenses

Day to day operating expenses for the year to date (excluding grant-funded programs, capital transfers and pass-through programs) total \$14,645,363 or 50% of the revised budget, with 58.3% of the year elapsed. Variances are explained in the notes following the report.

**C. Capital Improvement Program**

For the year to date, a total of \$1,212,076 has been expended on the Capital Improvement Program. The largest expense has been the farebox replacement at a cost of \$789,151. Federal funding for the purchase will be reflected in next month's report.

**IV. FINANCIAL CONSIDERATIONS**

Approval of the budget transfers will increase some line item expenses and decrease others. Overall, the changes are expense-neutral.

**V. ATTACHMENTS**

**Attachment A:** Revenue and Expense Report for January 2001, and Budget Transfers



**MONTHLY REVENUE AND EXPENSE REPORT  
OPERATING REVENUE - JANUARY 2001**

Operating Revenue	FY 00-01 Budgeted for Month	FY 00-01 Actual for Month	FY 00-01 Budgeted YTD	FY 99-00 Actual YTD	FY 00-01 Actual YTD	YTD Variance from Budgeted	
Passenger Fares	\$ 247,810	\$ 262,525	\$ 1,848,860	\$ 1,783,804	\$ 1,872,929	\$ 24,069	See Note 1
Paratransit Fares	\$ 19,954	\$ -	\$ 126,103	\$ 83,522	\$ 69,764	\$ (56,339)	See Note 1
Special Transit Fares	\$ 176,391	\$ 178,114	\$ 862,380	\$ 864,040	\$ 888,177	\$ 25,797	See Note 1
Highway 17 Revenue	\$ 65,081	\$ 71,899	\$ 467,354	\$ 432,332	\$ 497,972	\$ 30,618	See Note 1
Advertising Income	\$ 14,000	\$ 14,000	\$ 86,000	\$ 72,000	\$ 86,000	\$ -	
Other Aux Transp Rev	\$ 917	\$ 1,235	\$ 6,417	\$ 7,283	\$ 7,462	\$ 1,045	
Rent Income	\$ 14,449	\$ 11,705	\$ 80,723	\$ 61,105	\$ 80,790	\$ 67	
Interest - General Fund	\$ 96,412	\$ 114,343	\$ 670,539	\$ 489,198	\$ 701,706	\$ 31,167	See Note 2
Non-Transportation Rev	\$ 533	\$ 181	\$ 3,733	\$ 46,202	\$ 5,025	\$ 1,292	
Sales Tax Income	\$ 1,009,600	\$ 1,101,800	\$ 8,759,267	\$ 8,221,537	\$ 9,362,082	\$ 602,815	See Note 3
TDA Funds	\$ 470,999	\$ 470,999	\$ 2,969,606	\$ 2,337,032	\$ 2,969,606	\$ 0	
MBUAPCD Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other Local Funding	\$ -	\$ -	\$ 16,534	\$ -	\$ 16,534	\$ -	
State Guideway Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other State Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
FTA Op Asst - Sec 5303	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
FTA Op Asst - Sec 5307	\$ -	\$ -	\$ -	\$ 505,614	\$ -	\$ -	
FTA Op Asst - Sec 5311	\$ -	\$ -	\$ -	\$ 36,604	\$ -	\$ -	
Other Federal Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other Revenue	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total Operating Revenue</b>	<b>\$ 2,116,146</b>	<b>\$ 2,226,801</b>	<b>\$15,897,516</b>	<b>\$14,940,273</b>	<b>\$16,558,047</b>	<b>\$ 660,531</b>	

**MONTHLY REVENUE AND EXPENSE REPORT  
OPERATING EXPENSE SUMMARY-JANUARY 2001**

	FY 00-01 Final Budget	FY 00-01 Revised Budget	FY 99-00 Expended YTD	FY 00-01 Expended YTD	Percent Expended of Budget	
<b>PERSONNEL ACCOUNTS</b>						
Administration	\$ 586,021	\$ 554,021	\$ 227,163	\$ 284,504	51.4%	
Finance	\$ 526,041	\$ 510,663	\$ 224,142	\$ 256,351	50.2%	
Planning & Marketing	\$ 799,773	\$ 858,773	\$ 385,336	\$ 393,920	45.9%	
Human Resources	\$ 419,954	\$ 424,454	\$ 198,701	\$ 197,574	46.5%	
Information Technology	\$ 346,012	\$ 346,012	\$ 114,494	\$ 178,187	51.5%	
District Counsel	\$ 294,577	\$ 271,576	\$ 107,216	\$ 109,924	40.5%	
Facilities Maintenance	\$ 955,338	\$ 943,838	\$ 449,739	\$ 471,429	49.9%	
Operations	\$ 1,785,628	\$ 1,706,628	\$ 871,530	\$ 956,181	56.0%	
Bus Operators	\$ 10,088,130	\$ 10,721,858	\$ 5,147,234	\$ 5,797,410	54.1%	
Fleet Maintenance	\$ 3,371,075	\$ 3,504,025	\$ 1,473,850	\$ 1,702,821	48.6%	
Retired Employees Benefits	\$ 354,602	\$ 354,602	\$ 133,784	\$ 194,956	55.0%	
<b>Total Personnel</b>	<b>\$ 19,527,151</b>	<b>\$ 20,196,452</b>	<b>\$ 9,333,189</b>	<b>\$ 10,543,257</b>	<b>52.2%</b>	
<b>NON-PERSONNEL ACCOUNTS</b>						
Administration	\$ 539,600	\$ 546,465	\$ 276,351	\$ 296,399	54.2%	
Finance	\$ 464,325	\$ 463,960	\$ 229,487	\$ 236,435	51.0%	
Planning & Marketing	\$ 188,425	\$ 188,425	\$ 89,583	\$ 66,128	35.1%	
Human Resources	\$ 92,740	\$ 104,960	\$ 52,557	\$ 46,262	44.1%	
Information Technology	\$ 95,925	\$ 97,434	\$ 72,799	\$ 68,497	70.3%	
District Counsel	\$ 311,405	\$ 184,405	\$ 59,759	\$ 68,071	36.9%	
Facilities Maintenance	\$ 201,791	\$ 243,934	\$ 104,448	\$ 108,749	44.6%	
Wats TC Operation	\$ 89,244	\$ 94,994	\$ 37,995	\$ 39,420	41.5%	
Santa Cruz Metro Center	\$ 253,030	\$ 256,780	\$ 123,542	\$ 111,886	43.6%	
Scotts Valley TC	\$ 122,535	\$ 119,035	\$ 63,060	\$ 50,892	42.8%	
Paratransit Program	\$ 3,244,666	\$ 3,246,636	\$ 983,032	\$ 1,215,447	37.4%	See Note 4
Operations	\$ 201,891	\$ 201,457	\$ 535,130	\$ 104,733	52.0%	
Bus Operators	\$ 6,000	\$ 6,000	\$ 2,224	\$ 2,872	47.9%	
Fleet Maintenance	\$ 2,747,222	\$ 3,257,844	\$ 1,204,850	\$ 1,728,174	53.0%	
Op Prog/SCCIC	\$ 1,300	\$ 8,054	\$ 75	\$ 2,728	33.9%	
Reserve for Service Additions	\$ 150,000	\$ -	\$ -	\$ -	0.0%	
Reserve for New Positions	\$ -	\$ 73,498	\$ -	\$ -	0.0%	
Pre-Paid Exp Adj/Incurred W/C	\$ -	\$ -	\$ (48,644)	\$ (44,587)		See Note 5
<b>Total Non-Personnel</b>	<b>\$ 8,710,099</b>	<b>\$ 9,093,881</b>	<b>\$ 3,786,248</b>	<b>\$ 4,102,106</b>	<b>45.1%</b>	
<b>Subtotal Operating Expense</b>	<b>\$ 28,237,250</b>	<b>\$ 29,290,333</b>	<b>\$ 13,119,441</b>	<b>\$ 14,645,363</b>	<b>50.0%</b>	
Grant Funded Studies/Programs	\$ 43,750	\$ 97,496	\$ 37,518	\$ 9,995	10.3%	
Transfer to/from Cap Program	\$ -	\$ 301,171	\$ 9,233	\$ 299,780	99.5%	
Pass Through Programs	\$ 450,000	\$ 460,000		\$ 27,000	5.6%	
<b>Total Operating Expense</b>	<b>\$ 28,731,000</b>	<b>\$ 30,169,000</b>	<b>\$ 13,166,192</b>	<b>\$ 14,982,141</b>	<b>49.7%</b>	
<b>MD Operating Revenue Over YTD Expense</b>				<b>\$ 1,575,906</b>		

**CONSOLIDATED OPERATING EXPENSE  
JANUARY 2001**

	FY 00-01 Final Budget	FY 00-01 Revised Budget	FY 99-00 Expended YTD	FY 00-01 Expended YTD	% Exp YTD of Budget	
<b>LABOR</b>						
Operators Wages	\$ 5,275,946	\$ 5,618,731	\$ 2,773,212	\$ 3,044,605	54.2%	
Operators Overtime	\$ 687,958	\$ 841,378	\$ 444,335	\$ 510,423	60.7%	See Note 6
Other Salaries & Wages	\$ 5551,026	\$ 5,454,174	\$ 2,445,002	\$ 2,711,219	49.7%	
Other Overtime	\$ 211,271	\$ 241,271	\$ 174,244	\$ 151,134	62.6%	See Note 7
	\$ 11,726,200	\$ 12,155,554	\$ 5,836,793	\$ 6,417,380	52.8%	
<b>FRINGE BENEFITS</b>						
Medicare/Soc Sec	\$ 96,120	\$ 115,727	\$ 49,188	\$ 59,823	51.7%	
PERS Retirement	\$ 855,952	\$ 878,067	\$ 399,022	\$ 446,601	50.9%	
Medical Insurance	\$ 1,858,621	\$ 1,943,838	\$ 834,364	\$ 1,017,264	52.3%	
Dental Plan	\$ 501,187	\$ 523,466	\$ 207,511	\$ 266,661	50.9%	
Vision Insurance	\$ 122,065	\$ 127,470	\$ 56,824	\$ 61,662	48.4%	
Life Insurance	\$ 64,318	\$ 66,295	\$ 28,367	\$ 29,547	44.6%	
State Disability Ins	\$ 106,904	\$ 111,547	\$ 20,029	\$ 35,988	32.3%	
Long Term Disability Ins	\$ 444,702	\$ 458,425	\$ 127,977	\$ 219,177	47.8%	
Unemployment Insurance	\$ 27,692	\$ 28,895	\$ 18,081	\$ 19,222	66.5%	See Note 8
Workers Comp/Incurred WC	\$ 1,373,821	\$ 1,436,541	\$ 599,949	\$ 631,623	44.0%	
Absence w/Pay	\$ 2,325,929	\$ 2,325,929	\$ 1,146,972	\$ 1,324,470	56.9%	
Other Fringe Benefits	\$ 23,640	\$ 24,698	\$ 8,114	\$ 13,841	56.0%	
	\$ 7,800,951	\$ 8,040,898	\$ 3,496,398	\$ 4,125,878	51.3%	
<b>SERVICES</b>						
Acctng/Admin/Bank Fees	\$ 413,210	\$ 413,010	\$ 113,207	\$ 233,125	56.4%	
Prof/Legis/Legal Services	\$ 284,475	\$ 343,971	\$ 104,094	\$ 104,173	30.3%	
Temporary Help	\$ 12,534	\$ 128,598	\$ 71,491	\$ 92,043	71.6%	See Note 9
Uniforms & Laundry	\$ 38,497	\$ 43,997	\$ 19,957	\$ 19,841	45.1%	
Security Services	\$ 297,843	\$ 297,843	\$ 151,893	\$ 142,270	47.8%	
Outside Repair - Bldgs/Eqmt	\$ 160,444	\$ 141,598	\$ 78,120	\$ 77,736	54.9%	
Outside Repair - Vehicles	\$ 245,000	\$ 245,000	\$ 124,652	\$ 89,327	36.5%	
Waste Disp/Ads/Other	\$ 163,855	\$ 162,895	\$ 71,574	\$ 69,976	43.0%	
	\$ 1,615,858	\$ 1,776,912	\$ 734,988	\$ 828,494	46.6%	
<b>CONTRACT TRANSPORTATION</b>						
Contract Transportation	\$ 400	\$ 400	\$ -	\$ 22	5.5%	
Paratransit Service	\$ 3,033,966	\$ 3,033,966	\$ 983,032	\$ 1,051,657	34.7%	See Note 4
Hwy 17 Service	\$ -	\$ -	\$ 412,827	\$ -	0.0%	
	\$ 3,034,366	\$ 3,034,366	\$ 1,395,859	\$ 1,051,680	34.7%	
<b>MOBILE MATERIALS</b>						
Fuels & Lubricants	\$ 1,190,637	\$ 1,628,567	\$ 481,926	\$ 712,486	43.7%	
Tires & Tubes	\$ 150,000	\$ 150,000	\$ 103,789	\$ 61,479	41.0%	
Body/Upholstery Supplies	\$ 7,500	\$ 7,500	\$ 1,295	\$ 1,115	14.9%	
Revenue Vehicle Parts	\$ 603,885	\$ 603,885	\$ 275,462	\$ 371,009	61.4%	See Note 10
Inventory Adjustment	\$ -	\$ -	\$ (52,750)	\$ 173,933		See Note 11
	\$ 1,952,022	\$ 2,389,952	\$ 809,722	\$ 1,320,023	55.2%	

**CONSOLIDATED OPERATING EXPENSE  
JANUARY 2001**

	FY 00-01 Final Budget	FY 00-01 Revised Budget	FY 99-00 Expended YTD	FY 00-01 Expended YTD	% tpx YTD of Budget	
<b>OTHER MATERIALS</b>						
Postage & Mailing/Freight	\$ 17,100	\$ 17,225	\$ 7,159	\$ 8,611	50.0%	
Printing	\$ 86,411	\$ 95,696	\$ 38,227	\$ 35,744	37.4%	
Office/Computer Supplies	\$ 68,318	\$ 72,717	\$	\$ 37,051	51.0%	
Safety Supplies	\$ 17,928	\$ 17,928	\$ 35,520 6,873	\$ 7,374	41.1%	
Cleaning Supplies	\$ 70,400	\$ 69,900	\$	\$ 26,168	37.4%	
Repair & Maint Supplies	\$ 72,780	\$ 94,980	\$ 43,583 36,533	\$ 49,548	52.2%	
Parts, Non-Inventory	\$ 50,000	\$ 50,000	\$ 31,855 5,675	\$ 31,859	63.7%	See Note 12
Tools/Tool Allowance	\$ 19,780	\$ 21,680	\$	\$ 4,544	21.0%	
Photos/Mktg/Other Supplies	\$ 15,862	\$ 15,862	\$ 4,389	\$ 6,525	41.1%	
	\$ 418,579	\$ 455,988	\$ 209,814	\$ 207,423	45.5%	
<b>UTILITIES</b>						
	\$ 312,079	\$ 312,079	\$ 157,196	\$ 147,942	47.4%	
<b>CASUALTY &amp; LIABILITY</b>						
Insurance - Prop/PL & PD	\$ 175,000	\$ 175,000	\$ 64,672	\$ 85,760	49.0%	
Settlement Costs	\$ 250,000	\$ 100,000	\$ 28,116	\$ 28,169	28.2%	
Repairs to Prop	\$ 11,750	\$ 11,750	\$ (6,046)	\$ (4,625)		See Note 13
Prof/Other Services	\$ 30,500	\$ 30,500	\$ 17,852	\$ 7,683	25.2%	
	\$ 467,250	\$ 317,250	\$ 104,594	\$ 116,988	36.9%	
<b>TAXES</b>						
	\$ 41,872	\$ 44,272	\$ 25,795	\$ 25,843	58.4%	
<b>MISC EXPENSES</b>						
Dues & Subscriptions	\$ 50,564	\$ 43,464	\$ 25,664	\$ 28,203	64.9%	See Note 14
Media Advertising	\$ 46,400	\$ 59,900	\$ 8,581	\$ 4,724	7.9%	
Employee Incentive Program	\$ 15,000	\$ 15,135	\$ 8,257	\$ 7,738	51.1%	
Training	\$ 42,170	\$ 42,170	\$ 18,545	\$ 20,625	48.9%	
Travel & Local Meetings	\$ 61,025	\$ 67,125	\$ 28,339	\$ 27,519	41.0%	
Other Misc Expenses	\$ 13,500	\$ 13,500	\$ 11,966	\$ 10,373	76.8%	See Note 15
	\$ 228,659	\$ 241,294	\$ 101,352	\$ 99,180	41.1%	
<b>OTHER EXPENSES</b>						
Leases & Rentals	\$ 533,164	\$ 545,766	\$ 284,449	\$ 314,531	57.6%	
Service Reserve	\$ 150,000		\$ -	\$ -	0.0%	
New Position Reserve	\$ -	\$ 73,498	\$ -	\$ -	0.0%	
Transfer to Capital	\$ -	\$ 301,171	\$ 9,233	\$ 299,780	99.5%	
Pass Through Programs	\$ 450,000	\$ 480,000	\$ -	\$ 27,000	5.6%	
	\$ 1,133,164	\$ 1,400,435	\$ 293,682	\$ 641,311	45.8%	
Total Operating Expense	\$ 28,731,000	\$ 30,169,000	\$ 13,166,192	\$ 14,982,141	49.7%	

**MONTHLY REVENUE AND EXPENSE REPORT  
FY 00-01 CAPITAL IMPROVEMENT PROGRAM**

<b>CAPITAL PROJECTS</b>	<b>Program Budget</b>	<b>Expended in January</b>	<b>YTD Expended</b>
<b>Grant Funded Projects</b>			
Consolidated Operating Facility	\$ 8,104,770	\$ 6,416	\$ 102,569
Urban Bus Replacement	\$ 7,600,591	\$ 2,876	\$ 5,711
Engine Repower Project	\$ 3,037,000		
ADA Paratransit Vehicles	\$ 287,500		
Farebox Replacement	\$ 1,000,000	\$ 788,308	\$ 789,151
Computer System	\$ 152,500	\$ <del>604,301</del>	
Benches with Bike Storage (MBUAPCD)	\$ 30,000	19,164	
Non-Revenue Vehicle Replacement CNG	\$ 130,000		
Talking Bus	\$ 4,500		\$ 4,500
	\$ 20,346,861		
<b>District Funded Projects</b>			
Purchase of Buses	\$ 299,780	\$ 2,320	\$ 5,858
Bus Stop Improvements	\$ 452,100	\$ 2,320	\$ 5,858
Yield Signs for Buses	\$ 56,000		
Software for HR, Fac Mnt, Flt Mnt	\$ 75,000		
Bike Racks for Buses	\$ 4,500		\$ 3,885
Scotts Valley Transit Center Construction	\$ 9,000		
Metro Center Repairs	\$ 21,348	\$ 1,334	\$ 22,065
Facilities Repair & Improvements	\$ 196,316	\$ 3,346	\$ 13,460
Machinery/Equipment Repair/Impr	\$ 99,350	\$ 4,992	\$ 66,146
Non-Revenue Vehicle Replacement	\$ 160,000	\$ 81,685	\$ 101,512
Office Equipment	\$ 8,500		\$ 11,419
	\$ 1,381,894		
<b>TOTAL CAPITAL PROJECTS</b>	<b>\$ 21,728,755</b>	<b>\$ 907,959</b>	<b>\$ 1,212,076</b>
<b>CAPITAL FUNDING SOURCES</b>			
	<b>Budget</b>	<b>Received in January</b>	<b>YTD Received</b>
Federal Capital Grants	\$ 14,554,489		\$ 68,016
State Capital Grants	\$ -		
STA Funding	\$ 787,198	\$ 206,711	\$ 413,419
Local Capital Grants	\$ 60,481		\$ 481
Transfer from Operating Budget	\$ 301,171		
Interest Income	\$ 50,750		
District Reserves	\$ 5,726,166	\$ -	\$ 730,160
Transfer from Bus Stop Improvement Reserve	\$ 248,500		
<b>TOTAL CAPITAL FUNDING</b>	<b>\$ 21,728,755</b>	<b>\$ 206,711</b>	<b>\$ 1,212,076</b>

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
NOTES TO REVENUE AND EXPENSE REPORT**

1. Passenger fares (farebox and pass sales) are \$24,069 or 1.3% over the revised budget amount for the year to date. Paratransit fares are \$56,339 or 45% under budget for the period because the December and January revenue is not included in this report. Also, ridership is below projected levels. Special transit fares (contracts) are \$25,797 or 3.0% over the budgeted amount. Highway 17 Express revenue is \$30,618 or 6% over the year to date budgeted amount. Together, all four passenger revenue accounts are over the budgeted amount for the first seven months of the fiscal year by a net \$24,145 or 0.7%.
2. Interest income is \$31,167 or 4.6% over budget for the year to date due to a higher treasury balance than projected since some capital projects have been delayed.
3. Sales tax income is \$602,815 or 7.7% over budget for the first seven months of the fiscal year due to a higher quarterly wrap-up payment than projected. The budget projected a 6% increase over the previous year for the July - September sales period, while the receipts actually increased 13.7%.
4. Paratransit program expense is only at 37.4% of the budget because the December and January contractor billings were not available by the report deadline. If these payments were included, year-to-date expense would be closer to 46% of the budget.
5. Pre-paid expense adjustment provides for allocating large annual payments, such as casualty and liability insurance, over the entire year so that the total expenses District-wide for the month and year to date are not skewed.
6. Bus Operator overtime is at 60.7% of the revised budget to cover shifts of several operators on long-term absence. Total payroll for Bus Operators is within budget.
7. Other overtime is at 62.6% of the budget due to high overtime in Operations as a result of additional training for Transit Supervisors as well as staff absences. Total payroll for non-Operators is within budget.
8. Unemployment insurance is at 66.5% of the budget due to additional hiring and turnover.
9. Temporary help is at 71.6% of the budget due to hire of temporary workers during recruitment of new employees in the departments of Human Resources, Facilities Maintenance, and Fleet Maintenance, and a long-term absence in Human Resources.
10. Revenue vehicle parts expense is at 61.4% of the budget due to purchase of replacement engines.
11. Each month, the change in the Fleet Maintenance inventory value is recorded as either an expense or credit depending on whether the inventory increased or decreased.
12. Non-inventory parts expense is at 63.7% of the budget due to volume purchases.

13. Repairs to property is a casualty and liability account to which repairs to District vehicles and property are charged when another party is liable for the damage. All collections made from other parties for property repair are applied to this account to offset the District's repair costs. Collections have been applied for the year to date, but some repairs have yet to be charged to the account.
14. Dues and subscriptions are at 64.9% of the budget due to the annual payment for CTA dues.
15. Other miscellaneous expense is at 76.8% of the budget due to write-offs of uncollectable debts.

**FY 00-01 BUDGET TRANSFERS**  
**2/1/01 - 2/28/01**

	ACCOUNT #	ACCOUNT TITLE	AMOUNT
<b>TRANSFER # 01-035</b>			
TRANSFER FROM:	2200503352	Equipment Repair Out	\$ (5,000)
TRANSFER TO:	2200-512061	Equipment Rental	\$ 5,000
REASON:	To cover account overrun in the Facilities Maintenance Department.		
<b>TRANSFER # 01-036</b>			
TRANSFER FROM:	2400-504413	Electrical Supplies	\$ (100)
TRANSFER TO:	2400-504417	Mechanical Supplies	\$ 100
REASON:	To cover account overrun in the Facilities Maintenance Department.		
<b>TRANSFER # 01-037</b>			
TRANSFER FROM:	1500-504311	Office Supplies	\$ (500)
TRANSFER TO:	1500-504313	Computer Supplies	\$ 500
REASON:	To cover cost of software for IT Department.		
<b>TRANSFER # 01-038</b>			
TRANSFER FROM:	1300-504215	Printing	\$ (590)
TRANSFER TO:	1300-512061	Equipment Rental	\$ 590
REASON:	To cover shortage in Equipment Rental account for the Planning & Marketing Department.		
<b>TRANSFER # 01-039</b>			
TRANSFER FROM:	2200-501021	Salaries	\$ (4,000)
TRANSFER TO:	2200503041	Temporary Help	\$ 4,000
REASON:	To cover cost of temporary Custodial help while recruiting for position.		
<b>TRANSFER # 01-040</b>			
TRANSFER FROM:	2200-503351	Outside Repair - Bldg	\$ (5,000)
TRANSFER TO:	2200-503162	Uniforms & Laundry	\$ 5,006
REASON:	To cover expected expenditures for remainder of fiscal year for the Facilities Maintenance Department.		

7-7.8a



**FY 00-01 BUDGET TRANSFERS**

**2/1/01 - 2/28/01**

	ACCOUNT #	ACCOUNT TITLE	AMOUNT
<b>TRANSFER # 01-041</b>			
TRANSFER FROM:	2400-504415	Plumbing Supplies	\$ (500)
TRANSFER TO:	2400-504417	Mechanical Supplies	\$ 500
REASON:	To cover expected expenditures for remainder of fiscal year for the Facilities Maintenance Department.		
<b>TRANSFER # 01-042</b>			
TRANSFER FROM:	2600-503351	Outside Repair Bldg	\$ (7,000)
TRANSFER TO:	2200-504409	Repairs & Maintenance	\$ 7,000
REASON:	To cover expected expenditures for remainder of fiscal year for the Facilities Maintenance Department.		
<b>TRANSFER # 01-043</b>			
TRANSFER FROM:	2500-504319	Custodial Supplies	\$ (500)
TRANSFER TO:	2500-503162	Uniforms & Laundry	\$ 500
REASON:	To cover expected expenditures for remainder of fiscal year for the Facilities Maintenance Department.		
<b>TRANSFER # 01-044</b>			
TRANSFER FROM:	2600-503351	Outside Repair - Bldg	\$ (1,000)
TRANSFER TO:	2600-512061	Equipment Rental	\$ 1,000
REASON:	To cover account overrun for the Scotts Valley Transit Center.		

7-7.9a

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001  
**TO:** Board of Directors  
**FROM:** Elisabeth Ross, Finance Manager  
**SUBJECT: APPROVAL OF RENEWAL OF EMPLOYMENT PRACTICES  
LIABILITY INSURANCE**

## I. RECOMMENDED ACTION

**Staff recommends that the Board of Directors authorize renewal of employment practices liability coverage with U.S. Risk Underwriters, Inc. at a premium not to exceed \$15,000.**

## II. SUMMARY OF ISSUES

- Last year, the District obtained employment practices liability coverage with U.S. Risk Underwriters, Inc. through CalTIP's excess insurance broker, Aon Risk Services.
- The coverage includes discrimination, sexual harassment and wrongful termination. It covers the District, directors and officers, employees and former employees.
- Aon is offering renewal of the same coverage.

## III. DISCUSSION

The District's current policy for employment practices liability coverage is expiring on March 26, 2001. Aon is in the process of obtaining a quotation for renewal of the policy. U.S. Risk has expressed interest in renewing the policy, and staff has submitted the required application documents.

## IV. FINANCIAL CONSIDERATIONS

The premium cost is included in the FY 00-01 budget.

## V. ATTACHMENTS

None.

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001  
**TO:** Board of Directors  
**FROM:** Elisabeth Ross, Manager of Finance  
**SUBJECT:** AUTHORIZATION FOR DISPOSAL OF VEHICLE #809

## I. RECOMMENDED ACTION

**Staff recommends that the Board of Directors declare Vehicle #809 as excess and authorize disposal.**

## II. SUMMARY OF ISSUES

- In accordance with the District's policy on disposal of fixed assets and inventorable items, at least once per year the Finance Manager shall recommend to the Board of Directors a list of items to be declared excess with appropriate action for disposal.
- Vehicle #809 is a 1984 Ford ¾ ton truck assigned to the Facility Maintenance Department. The vehicle has exceeded its useful life and is operable, but in poor condition, and is therefore recommended for disposal.

## III. DISCUSSION

The estimated current market value of the vehicle recommended for disposal is \$500. Upon the Board's declaration of the vehicle as excess, it will be offered for sale by the District's Purchasing Office. It has a recent smog certificate and is ready to be sent to auction.

## IV. FINANCIAL CONSIDERATIONS

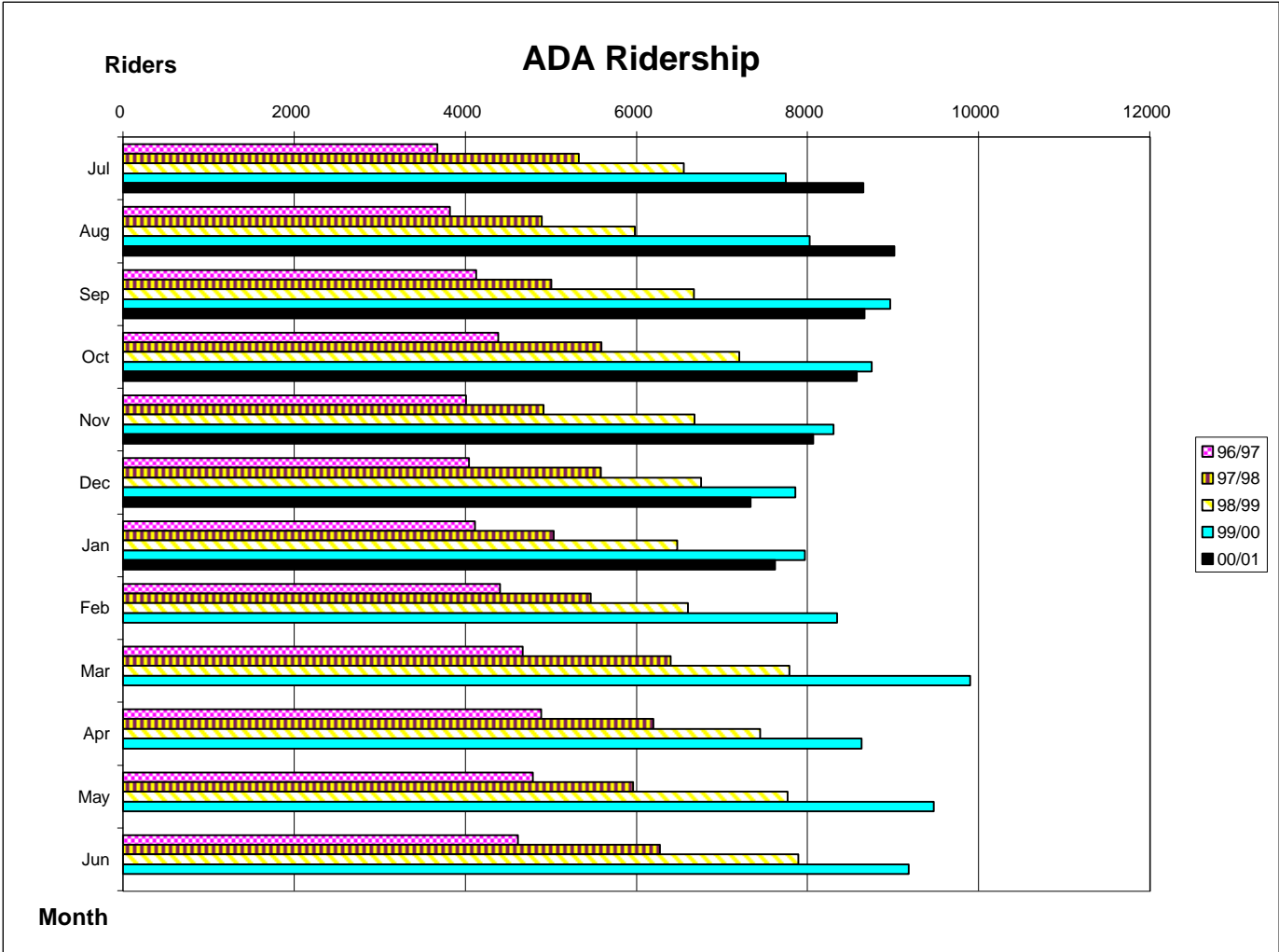
The current net book value of the vehicle is zero. Any proceeds from the sale will be recorded as income to the District.

## V. ATTACHMENTS

**None.**

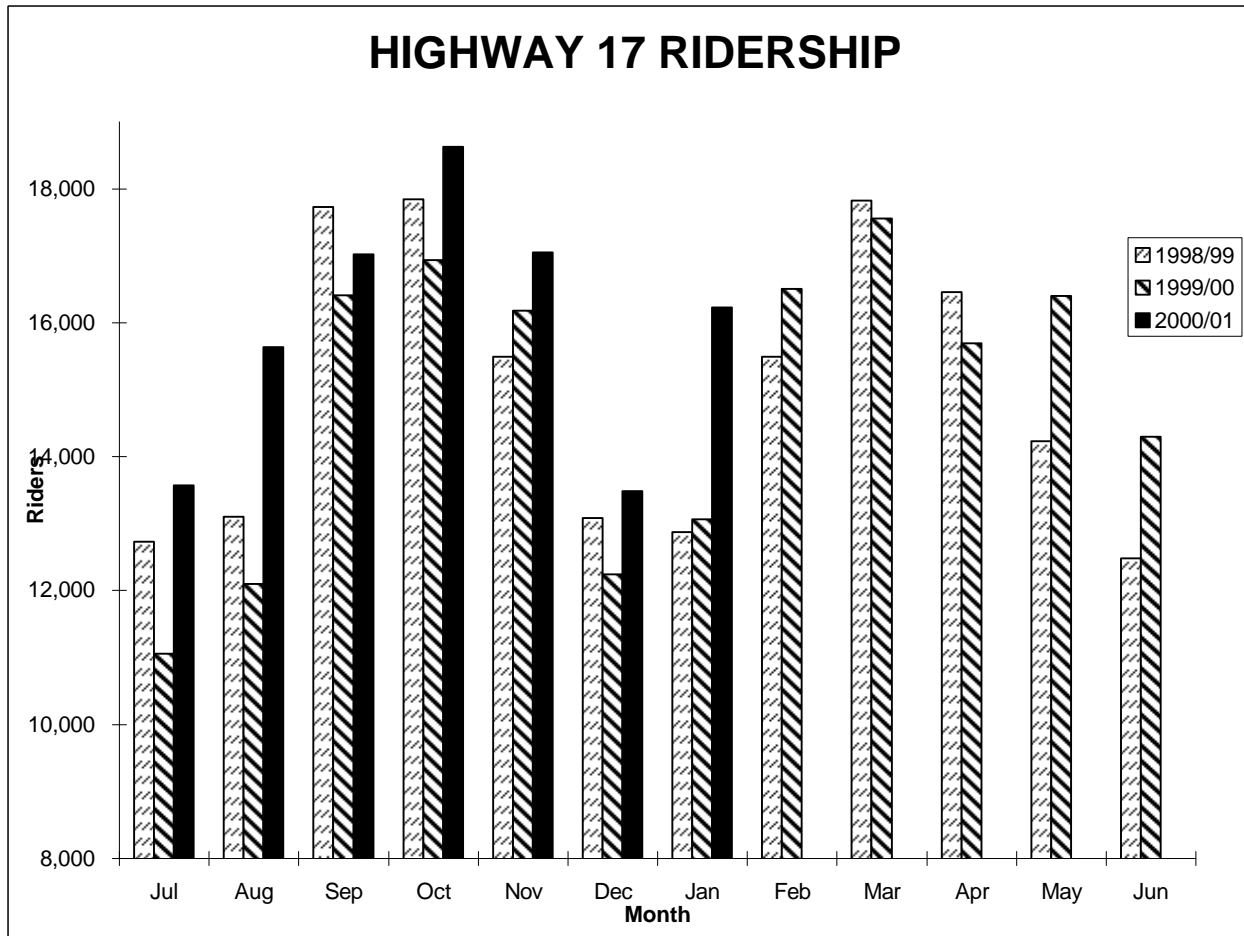
**ADA Paratransit Program  
Monthly Status Report**

	This January	Last January	% Change	This YTD	Last YTD	% Change
Cost	\$ 178,406	\$ 174,676	2.1%	\$ 1,339,387	\$ 1,247,873	7.3%
Revenue	\$15,228	\$15,928	-4.4%	\$115,758	\$115,150	0.5%
Subsidy	\$163,178	\$158,748	2.8%	\$1,223,629	\$1,132,723	8.0%
Passengers	7,614	7,964	-4.4%	57,879	57,575	0.5%
Cost/Ride	\$23.43	\$21.93	7.5%	\$23.14	\$ 21.67	7.5%
Subsidy/Ride	\$21.43	\$19.93	7.5%	\$21.14	\$19.67	7.5%
Operating Ratio	8.5%	9.1%	-6.4%	8.6%	9.2%	-6.3%
% Rides on Taxi	62.3%	68.9%	-9.6%	68.4%	71.0%	-3.8%
Program Registrants	8,175	6,842	19.5%	8,175	6,842	19.5%
Rides/Registrant	0.9	1.2	-20.0%	7.1	8.4	-15.9%



# HIGHWAY 17 - JANUARY 2001

	January			YTD		
	2000/01	1999/00	%	2000/01	1999/00	%
<b>FINANCIAL</b>						
Cost	\$ 109,690	\$ 98,289	11.6%	\$ 737,913	\$ 786,203	(6.1%)
Farebox	\$ 33,993	\$ 29,830	14.0%	\$ 245,773	\$ 233,808	5.1%
Operating Deficit	\$ 75,582	\$ 68,318	10.6%	\$ 480,548	\$ 539,182	(10.9%)
Santa Clara Subsidy	\$ 37,791	\$ 28,925	30.7%	\$ 240,274	\$ 248,406	(3.3%)
METRO Subsidy	\$ 37,791	\$ 39,393	(4.1%)	\$ 240,274	\$ 412,296	(41.7%)
San Jose State Subsidy	\$ 115	\$ 141	(18.4%)	\$ 11,591	\$ 13,212	(12.3%)
<b>STATISTICS</b>						
Passengers	16,229	13,061	24.3%	111,620	97,989	13.9%
Revenue Miles	32,918	31,421	4.8%	222,941	221,445	0.7%
Revenue Hours	1,280	1,222	4.8%	8,670	8,612	0.7%
<b>PRODUCTIVITY</b>						
Cost/Passenger	\$ 6.76	\$ 7.53	(10.2%)	\$ 6.61	\$ 8.02	(17.6%)
Revenue/Passenger	\$ 2.09	\$ 2.28	(8.3%)	\$ 2.20	\$ 2.39	(7.7%)
Subsidy/Passenger	\$ 4.66	\$ 5.24	(11.0%)	\$ 4.41	\$ 5.64	(21.8%)
Passengers/Mile	0.49	0.42	18.6%	0.50	0.44	13.1%
Passengers/Hour	12.68	10.69	18.6%	12.87	11.38	13.1%
Recovery Ratio	31.0%	30.3%	2.1%	33.3%	29.7%	12.0%



# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001  
**TO:** Board of Directors  
**FROM:** Bryant J. Baehr, Manager of Operations  
**SUBJECT: ACCEPT AND FILE RIDERSHIP REPORT FOR THE HOMELESS SHELTER SHUTTLE**

## I. RECOMMENDED ACTION

**No action is required. This report is for informational purposes only.**

## II. SUMMARY OF ISSUES

- On January 09, 2001 the Board of Directors authorized staff to operate the Homeless Shelter Shuttle through April 15, 2001. The Shuttle started on February 05, 2001 at Mr. Cole's request.
- From February 05, 2001 through February 28, 2001 total ridership is 3,702. Ridership is exceeding initial projections. Average daily ridership stands at 154 passengers per day.
- This report is for information purposed only. No action is requested.

## III. DISCUSSION

On January 19, 2001 the Board of Directors approved the operation of a shuttle from the Homeless Shelter on Coral Street to the National Guard Armory. The following trips were developed in conjunction with Mr. Ken Cole, Director of the Homeless Shelter:

### **Morning Departures from Metro Center**

605am and 650am

### **Afternoon Departures from Metro Center**

455pm and 535pm

The shuttle route started on February 05, 2001, at Mr. Cole's request, and ridership from that date to February 28, 2001 is 3,702. The attached graph shows the day by day ridership breakdown. Ridership on this route is exceeding expectations.

On February 06 – 07, 2001, the total ridership for those two (2) days totaled 316 passengers. Tickets for the shuttle were not pulled from the farebox until the February 08, 2001 thus staff has estimated the daily breakdown. Shelter tickets are made of a lightweight material and the

Revenue Collection Department thought that the farebox was empty when checked on February 07, 2001.

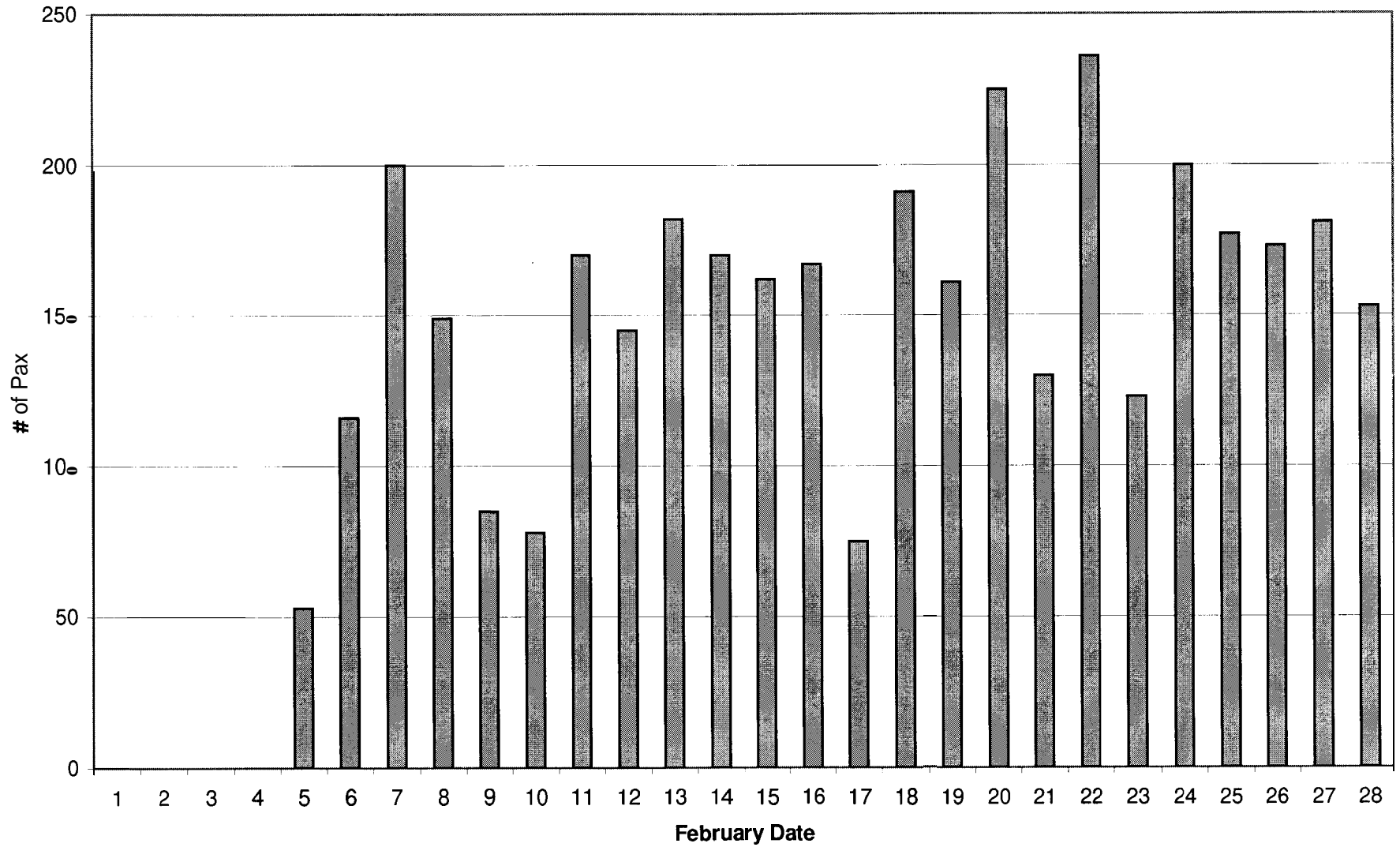
**IV. FINANCIAL CONSIDERATIONS**

None

**V. ATTACHMENTS**

**Attachment A: Graph of Shuttle Ridership for February**

### Shelter Shuttle February Ridership





# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001  
**TO:** Board of Directors  
**FROM:** Paul Chandley, Human Resources Manager  
**SUBJECT: PRESENTATION OF ANNIVERSARY AWARDS**

## **I. RECOMMENDED ACTION**

**Staff recommends that the Board of Directors recognize the anniversaries of those District employees named on the attached list and that the Chairperson present them with awards.**

## **II. SUMMARY OF ISSUES**

- None.

## **III. DISCUSSION**

Many employees have provided dedicated and valuable years to the Santa Cruz Metropolitan Transit District. In order to recognize these employees, anniversary awards are presented at five-year increments beginning with the tenth year. In an effort to accommodate those employees that are to be recognized, a limited number will be invited to attend Board meetings from time to time to receive their awards.

## **IV. FINANCIAL CONSIDERATIONS**

None.

## **V. ATTACHMENTS**

**Attachment A:** Employee Recognition List

**ATTACHMENT A**  
**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT**  
**EMPLOYEE RECOGNITION**

**TEN YEAR**

None

**FIFTEEN YEARS**

None

**TWENTY YEARS**

**Maria Granados-Boyce, Bus Operator**

**Mark Hansen, Mechanic II**

**Meral Jensen, Mechanic II**

**TWENTY-FIVE YEARS**

**Everette Wehe, Bus Operator**

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 9, 2001

**TO:** Board of Directors

**FROM:** Leslie White, General Manager

**SUBJECT: CONSIDERATION OF SETTING NOTIFICATION OF INITIATION OF ENVIRONMENTAL IMPACT REPORT (EIR) FOR METROBASE AND CONSIDERATION OF SETTING DATE, LOCATION AND FORMAT FOR A PUBLIC SCOPING MEETING**

## I. RECOMMENDED ACTION

**Establish the Date/Location and Format for a Scoping Meeting**

## II. SUMMARY OF ISSUES

- The Santa Cruz Metropolitan Transit District has committed itself to prepare an Environmental Impact Report (EIR) for the MetroBase Project;
- At the September 15, 2000, Board Meeting the Board of Directors authorized the commencement of the California Environmental Quality Act (CEQA) process including the EIR.
- Since that date WaterLeaf Architecture and Interiors, the architects, who have been retained for the MetroBase Project, have been preparing various required documents for the environmental consultants in order for them to be able to commence the EIR. The architects have completed their work and the environmental consultants have prepared an initial study and a notice of preparation for the project.
- At this time the EIR consultants, Denise Duffy and Associates, have indicated that it is appropriate to set a Public Scoping Meeting.

## III DISCUSSION

The Santa Cruz Metropolitan Transit District has committed itself to prepare an EIR for the MetroBase Project. Once the preferred site was selected by the Board of Directors in September 2000, the architects in conjunction with the District's environmental consultants began preparing documentation necessary for the EIR. Attached to this staff report is Denise Duffy and Associates' MetroBase Harvey West Scope of Services for the preparation of the EIR. Because the Transit District will be carrying out the project, it will act in the capacity of lead agency for the EIR, that is, it is the agency responsible for preparing and certifying the EIR. District approval for the MetroBase project cannot

occur until the environmental review process of the preferred site is completed including the preparation and certification of an EIR.

According to Denise Duffy and Associates, following the initial study, the first step in the EIR process is scoping. Scoping is the process of determining the scope, focus, and content of an EIR. It is also an effective way to bring together and resolve the concerns of interested federal, state and local agencies, the project proponent, and other interested parties. Tools used to determine the scope include, among other things, the notice of preparation and scoping meetings with agencies and in this case, the public.

At this time it is appropriate to set the date and location for the public scoping meeting. It is recommended that the meeting take place during April, 2001, and that it be an evening meeting. I suggest that the scoping meeting be scheduled for April 25, 2001 from 7:00pm to 9:30pm at the County Board of Supervisor's Chambers. It is anticipated that many people will be interested in speaking at the scoping meeting in order to present their views of the project scope and to suggest alternatives to be considered. A scoping meeting can take place during a Board Meeting but this is not required. The environmental consultants, specifically, Leianne Humble and Jeff Foster, have advised that they can facilitate the discussion at the scoping meeting. They have experience in this regard from previously prepared EIRs. One of these consultants will take notes during the meeting so that issues can be addressed in the EIR. At this time, Staff needs direction on the following issues:

- 1) Date and Time of Scoping meeting;
- 2) Location of Scoping meeting;
- 3) Whether the Scoping Meeting will take place in conjunction with a Special Board Meeting; and
- 4) Whether the environmental consultants shall lead the discussion at the Scoping Meeting.

#### **IV FINANCIAL CONSIDERATIONS**

An EIR for MetroBase may cost as much as \$200,000. Funds for the EIR will be provided under the contract between the Transit District and WaterLeaf Architecture and Interiors.

#### **V. ATTACHMENTS**

Attachment A Denise Duffy and Associates, Inc.'s MetroBase Harvey West Scope of Services

## **METROBASE HARVEY WEST SCOPE OF SERVICES**

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Denise Duffy & Associates, Inc. (DD&A) will prepare an Environmental Impact Report (EIR) for the proposed MetroBase facility in the Harvey West area of Santa Cruz, proposed by the Santa Cruz Metropolitan Transit District. The project would consolidate the majority of the District's maintenance, bus storage, and administrative offices at one location in Harvey West. The new facility will support up to 175 buses in the near term. The EIR will address two development options for the project (referred to as Options A and B). Under Option A, the proposed facility will encompass the entire 20-acre Encinal Street site (east and west portions). Option B assumes development of only the west portion of the Encinal site, and use of the District's existing River Street site for bus storage. The project would require the acquisition of and reconfiguration of existing uses on the Encinal site. Option B is proposed to avoid property acquisition on the east portion of the Encinal site, which contains existing residential, industrial, office, and commercial development.

### **Project Initiation**

DD&A will meet with District staff to confirm our approach in the scope of work, outline the schedule, and review available background information. During this task, DD&A will work with the District and Waterleaf to further define and obtain any information needed to complete the Initial Study and EIR.

### **Prepare Initial Study**

DD&A will prepare the Initial Study for the project in accordance with CEQA requirements. This document will include 1) a brief description of the project, 2) a completed CEQA environmental checklist, 3) summary assessment of anticipated environmental impacts, and 4) references.

### **Prepare NOP**

DD&A will prepare the Notice of Preparation (NOP) for the EIR, including a brief project description and identification of potential impacts, based on the Initial Study. The NOP will be submitted to the District for circulation for a 30-day public review period.

### **Prepare Administrative Draft EIR**

DD&A will prepare a focused Administrative Draft EIR for the project, in accordance with CEQA requirements. The EIR will include a summary, description of the proposed project, characterization of the environmental setting, and a discussion of potential environmental impacts and appropriate mitigation measures. DD&A will submit 10 copies of the ADEIR to the District, for review and comment.

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The EIR will describe in detail the proposed MetroBase facility (two options), the existing environmental conditions on the project site, and assess potentially significant impacts associated with the proposed facility. The impact analysis will apply specific criteria for determining the significance of impacts, consistent with criteria set forth in CEQA and applicable professional and local standards. Mitigation measures will be identified for significant environmental impacts identified in the EIR. The major issues to be addressed in the EIR are described below.

- Land Use / Acquisition
- Traffic
- Noise
- Air Quality
- Biology
- Hazardous Materials
- Cultural Resources
- Geology/Soils
- Drainage/Water Quality
- Visual
- Public Services

**Project Description;** A description of the both project options will be provided, including site and regional location, project objectives, intended uses of the EIR, and a list of discretionary actions required for the project. This section will describe the two project options and illustrate the various components of each option with text, plans, and tables, based on information provided to us by the architect, Waterleaf.

**Lund Use:** This section will describe the existing land uses on and surrounding the Encinal and River Street sites, including industrial, office, and residential development, as well as natural resources. This section will assess the land use impacts of the project options, including 1) compatibility with surrounding existing and planned uses, 2) project consistency with applicable land use plans and policies, and 3) impacts from acquisition of property rights, required under Phase II, Option A. Mitigation will be identified for significant impacts.

**Traffic and Circulation:** The EIR will address traffic, based on a traffic analysis prepared by Higgins Associates, Inc. The EIR will incorporate the findings of the traffic study, to address the following:

- Description of existing roadway network in the project area.
- Evaluation of the traffic impacts/conditions at 10 intersections, for the following conditions: 1) Existing Conditions; 2) Existing + Background Conditions; 3) Project Conditions (under both options); and 4) Cumulative Conditions (under both options).
- Operational analysis of Highway 1/Highway 17 interchange, using data from the County Regional Transportation Commission and Caltrans.
- Identification of anticipated traffic impacts on affected transportation facilities, based on trip generation (based on driveway counts at existing facilities and information from the District), and a level of service analysis at the study intersections.
- Adequacy of site access, including emergency access.
- Identification of mitigation measures.

**Noise:** The EIR will describe the existing ambient noise in the vicinity of the two sites being considered for use, and assess both the short-term and long-term noise impacts resulting from the proposed project under both options, based on a noise analysis prepared by Charles M. Salter

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Associates, Inc. The findings of the noise analysis will be summarized in the EIR, and address the following:

- Identification of sensitive receptors near the site (e.g., residences, parks, schools).
- Measure existing noise levels at sensitive receptors near the site, primarily residential areas.
- Estimated increase in environmental noise levels along roadways serving the site due to changes in bus operations.
- Estimated environmental noise levels generated by onsite maintenance activities, including vehicle washing and repair, brake testing, and idling.
- Short-term noise impacts during building demolition and construction.
- Identification of mitigation for significant impacts on nearby sensitive receptors.

**Air Quality:** The EIR will describe the air quality of the area and provide an assessment of the potential air quality impacts of the project, based on an air quality analysis prepared by Donald Ballanti, certified consulting meteorologist. This analysis will include the following:

- Description of the existing meteorological characteristics and air quality in the project area, and identification of sensitive receptors affected by development (e.g., residences, etc.).
- Discussion of the relevant federal, state, and local regulatory provisions regarding air pollutant emissions.
- Assessment of potential localized impacts from project traffic at congested (LOS D or worse) study intersections from carbon monoxide concentrations.
- Evaluation of potential toxic air contaminants (TACs) from the project, including diesel emissions (from diesel buses during the phasing-in of CNG) and certain maintenance activities, including spray painting operations. This will be conducted performing a screening health risk assessment.
- Address short-term air quality impacts during construction, resulting from dust and exhaust emissions from construction activities.
- Identify mitigation for significant impacts.

**Biology:** An assessment of potential impacts on biological resources will be conducted by DD&A's Natural Resources Division, to determine potential impacts on vegetation and wildlife. This analysis will focus on the impacts to the Pogonip Creek riparian habitat, including any encroachment into the corridor, potential impacts from construction disturbance, proposed maintenance activities, and night lighting. In addition, the biological analysis will address use of the River Street site under Option B, and potential effects on the San Lorenzo River and other resources.

It is assumed that the developed portions of the Encinal Street and River Street sites are of low biological value, and that suitable habitat for rare, threatened or endangered species is absent. The biological investigation will include a check of the CNDDDB and CNPS databases, contact with the CDFG area biologists, a site visit, habitat mapping, identification of typical species present, analysis of direct and indirect impacts, and recommendation of appropriate mitigation and monitoring. *Please note that this scope does not include protocol-level special status species surveys or wetland delineations.*

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**Hazardous Materials:** This section will address the potential for hazardous materials contamination on the project site and surrounding area, based on an Expanded Phase I Site Assessment, to be prepared by Lowney Associates, Inc. This section will address the following:

- Results of an onsite survey of existing uses to determine hazardous materials use and potential contamination. The extent of this task will be dependent on the amount of access allowed into existing facilities. If access is denied, visual observations will be made from adjacent accessible areas.
- Findings of a drive-by survey of surrounding uses to determine potential for use of hazardous materials.
- Brief description of site hydrology, including groundwater flow.
- Discussion of site history, based on review of sources such as aerial photos, topographical maps, fire insurance rate maps, title reports, and files at local health and building departments.
- Review of regulatory database to determine the presence and type of contamination incidents reported in the project vicinity.
- Evaluation of potential hazardous materials impacts, including 1) contamination from onsite or adjacent uses, and 2) use of hazardous materials at the proposed facility.
- Discussion of CNG use and potential hazards, based on information provided to DD&A by the District. *This analysis will be provided by DD&A, based on available information, and does not include a technical risk assessment for CNG.*
- Identification of mitigation or recommendations for further analysis (i.e., soil or groundwater) for potentially significant impacts.

**Cultural Resources:** The project site, although developed, may be archaeologically sensitive due to its location near Pogonip Creek. An evaluation of potential archaeological resources on the site will be provided based on a study prepared by Archaeological Consulting. This study will include an archival search and surface reconnaissance to determine the potential for archaeological resources on the site, and identify potential impacts and mitigation.

The project site contains several buildings and residences that may date from the historic period (pre-1955). The residence at 118 Post Street (APN 001-042-13), built around 1880, has been previously identified as historic in the Historic Building Survey. An evaluation of the historical significance of all properties within the project area will be provided based on a historic architectural technical report prepared by URS Corporation. This analysis will include the following:

- Preliminary research of records in the Northwest Information Center, the California Office of Historic Preservation, and the City and County of Santa Cruz.
- Field survey and photographs of all buildings (it appears that there are seven that are at least 45 years of age and approximately 15 that are less than 45 years of age).
- Research to prepare the historic contexts within which to evaluate the significance of all properties greater than 45 years of age.
- Preparation of address list for buildings less than 45 years of age. For buildings greater than 45 years of age, evaluation of significance in relation to California Register of Historic Resources on DPR 523 records (assuming seven DPR 523 records will be prepared).

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- Preparation of technical report that includes project description, field and research methods, historical contexts, findings, bibliography, DPR 523 records and address list.

**Geology/Soils:** The geologic and geotechnical hazards on the site will be addressed in the EIR, based on a preliminary geotechnical report prepared by Haro Kasunich Associates and provided to DD&A by Water-leaf. Key issues to be evaluated include seismicity, soil conditions/hazards, grading, and erosion. The EIR will identify that a design-level geotechnical study will be prepared for the project prior to construction. Mitigation and recommendations in the preliminary geotechnical study will be identified for significant impacts.

**Drainage/Water Quality:** The EIR will describe the drainage characteristics of the project site and area, including flood potential and existing drainage facilities. Flooding potential on the site from San Lorenzo River or Pogonip Creek will be identified, based on FEMA's Flood Insurance Rate maps. This section will describe the proposed drainage system for the project, and estimate the increase in post-development runoff flows, based on drainage calculations provided by Waterleaf.

This section will also assess the potential surface water quality impacts from project development, resulting from construction activities and runoff from the site containing pollutants such as oil, grease, and metals from buses and maintenance activities on the site. Appropriate mitigation will be identified for drainage and water quality impacts.

**Visual:** The visual effects of the project will be evaluated, using site photographs and conceptual renditions of the proposed MetroBase facility. Visual impacts may result from alteration of the existing viewshed, and the use of night lighting for maintenance activities and security. The EIR will address the visual impacts from surrounding viewpoints, including residential areas. Mitigation will be identified for significant visual impacts.

**Public Services:** The EIR will address the anticipated project demands on public services and utilities, including water supply/service, wastewater treatment, solid waste disposal, police, and fire protection services. This section will also evaluate CNG demand and infrastructure requirements of the project.

**Cumulative Impacts:** The EIR will describe the cumulative impacts resulting from the project combined with other proposed development in the project area, based on consultation with the City and County of Santa Cruz. The cumulative analysis will address impacts upon traffic, air quality, and noise.

**Project Alternatives:** DD&A will consult with District staff to determine a range of feasible alternatives. Project alternatives would consider previous sites evaluated by the District, including the Westside site. In addition, this section will address the No Project Alternative and a Reduced or Modified Design Alternative. Alternatives will be discussed qualitatively. This section will identify an environmentally superior alternative, based on the number and degree of associated environmental impacts.

**Other CEQA Sections:** The major environmental issues to be addressed in the EIR are described above. The EIR will also address other issues, as required by CEQA. These issues are listed below.

- Growth Inducing Impacts
- Effects Found to be Less Than Significant
- Irretrievable Commitment of Resources
- References

### **Prepare Draft EIR**

Upon conclusion of the District's review of the Administrative Draft EIR, DD&A will revise the documents based on staffs comments, as appropriate. Upon approval of the Draft EIR (DEIR) by the District, DD&A will submit 75 copies of the DEIR to the District for public distribution.

### **Prepare Amendment to DEIR (Final EIR)**

Upon conclusion of the 45-day public review period for the DEIR, DD&A will prepare the Amendment to the DEIR, in coordination with the District. This document, together with the DEIR, will constitute the Final EIR. The Amendment will consist of the following: 1) revisions to the EIR text, as necessary; 2) list of individuals and agencies commenting on the DEIR; 3) copies of letters received on the DEIR; and 4) written responses to comments received.

DD&A will submit 10 copies of the Administrative Amendment to the DEIR, including the response to comments, to the District for review and comment. Upon receipt of comments from the District, DD&A will revise the documents and submit 75 copies of the Final EIR to the District for public distribution.

*DD&A has allotted 100 hours of staff time for responding to comments on the DEIR. DD&A reserves the right to review the public comments when available and submit a request for additional compensation, should new issues arise outside the scope of work that require additional technical analysis, or should the anticipated number of comments or work required to complete the responses exceed the estimated amount.*

### **Prepare Mitigation Monitoring and Reporting Program**

A Mitigation Monitoring and Reporting Program (MMRP) will be prepared and submitted to the District. The MMRP will identify responsibility, timing, funding, and reporting of mitigation measures identified in the EIR.

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## **Prepare Noticing**

DD&A will prepare noticing for the EIR on behalf of the District. These notices are as follows:

- Notice of Preparation (described previously)
- Notice of Availability
- Notice of Completion
- Notice of Determination

This scope assumes that all public mailings (of EIRs, NOPs, etc.) will be conducted and paid for by the District.

## **Meetings/Public Hearings**

DD&A will attend the following meetings: one EIR scoping meeting, two public hearings on the EIR, and eight meetings with staff. The scope includes attendance at three meetings/hearings by the traffic consultant. Any request(s) for meeting/hearing attendance by DD&A or any of its subconsultants not provided for within this scope will be billed on a time and materials basis.

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# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001  
**TO:** Board of Directors  
**FROM:** Elisabeth Ross, Finance Manager  
**SUBJECT: APPROVAL OF FY 01-02 PRELIMINARY LINE ITEM BUDGET FOR REVIEW AND CLAIMS PURPOSES**

## I. RECOMMENDED ACTION

Staff recommends that the Board of Directors adopt the attached preliminary line item budget for FY 01-02, for review and TDA/STA claims purposes.

## II. SUMMARY OF ISSUES

- The proposed FY 01-02 preliminary line item operating budget totals \$31,736,000.
- Major operating revenue assumptions in the budget include a 5.0% increase in sales tax revenue; a 5% increase in farebox revenue over current levels; a substantial increase in UCSC passenger revenue; and a 5.0% increase in TDA funding.
- The projected amount for the TDA allocation is \$474,476 above the level adopted by the Santa Cruz County Regional Transportation Commission (SCCRTC).
- The proposed budget provides for continuation of existing level of service only. No funds are available at this time for additional service improvements, other new programs or staffing increases.
- The preliminary capital program is comprised of twelve projects totaling \$20,199,461, requiring a District share of \$6,588,172 from reserves and STA funding to fund local projects.
- A meeting with Union representatives will be scheduled in early May to answer questions about the budget and obtain input from the employee organizations.
- During the budget process, staff will continue to refine revenue and expense projections as updated information becomes available. Staff will present a draft final budget to the Board in May.

## III. DISCUSSION

A preliminary line item budget must be adopted by the Board of Directors in March of each year in order to allow submittal of the District's Transportation Development Act (TDA) and State Transit Assistance (STA) claims to the Santa Cruz County Regional Transportation Commission (SCCRTC) by the April 1<sup>st</sup> deadline.

### **A. Operating Revenues**

Operating revenues total \$31,736,000. All fare revenue accounts have been projected based on data through January 2001 and will be updated prior to presentation of the draft final budget in May.

UCSC passenger revenue is projected to increase by 31% over the current fiscal year due to the planned implementation of bi-directional service on campus in September 2001.

Advertising income in the amount of \$174,000 is projected based on the current contract with Obie Media.

Sales tax revenues have been projected to increase by 5.0% over FY 00-01 projected receipts. The sales tax projection will be updated after the March 25<sup>th</sup> report from the State Board of Equalization which will detail the sales tax performance during the October – December 2000 sales period. The State Board of Equalization has projected an increase of 4.8% for sales tax revenue state-wide in FY 01-02.

The estimate for TDA funding in the amount of \$6,242,303 is not based on SCCRTC projections since they appear to be low. The SCCRTC allocation is \$5,767,827, a difference of \$474,476 from the District's projection. In order to formulate the preliminary budget figure of \$6,242,303, District staff projected the rest of the current year's sales tax revenue for both the SCCRTC and the District, and assumed a 5.0% increase for next year. Again, the current year projection will be updated when the March report is received from the State Board of Equalization. However, at this time, District staff is projecting a 9.8% increase in FY 00-01 sales tax revenue for the SCCRTC for a total of \$7,592,657. Assuming the District receives the same 78.3% of the total revenue that it was allocated for the previous year, this results in an allocation of \$6,242,303 to the District in FY 01-02.

In order to balance the preliminary budget, Federal operating assistance has been retained. Federal assistance under Sections 5307 and 5311 is projected to be the same as the current year allocation, based on preliminary communications from the President and Congress. However, the actual allocation for FY 01-02 will not be determined by Congress until October 2001.

The operating budget includes funding for two carryover plans: \$35,000 in FTA Section 5303 grant funds to prepare a multi-year strategic implementation plan and \$35,000 in FTA Section 5303 funding for a customer information services and marketing plan. Funding for both projects is administered through AMBAG.

### **B. Operating Expenses**

Operating expenses are at or near FY 00-01 projected actual levels in most departments. There are no proposed changes in the number of staff positions from the current authorized number at this time with the exception of one new staff position to assist in administration of the paratransit program.

The paratransit contract transportation expense has been budgeted to allow for 104,486 trips, with 60% by taxi and 40% by Lift Line van. Paratransit fares are budgeted at \$208,792 to reflect the \$2.00 fare per trip. Currently, the system is providing approximately 8,000 trips per month and steadily increasing. The District may need to expand funding in this area.

Labor and benefit costs have increased by about 7% since the District will be operating a full year of service improvements added in December 2000 and March 2001.

The preliminary budget amounts for casualty and liability insurance are estimates only, since the actual billings will not be received until May. The projected figures are higher than current year figures because the District received a rebate in FY 00-01 which reduced the premiums in the current year. In order to reduce premium costs, the District has increased the CalTIP deductible from \$100,000 to \$250,000 for a savings of \$42,347.

### **C. Capital Improvement Program**

The FY 01-02 capital improvement program contains twelve projects as shown in the capital budget at the end of Attachment A. The largest capital project, consolidated operating facility, requires a District share of \$1,620,954 for the work estimated to be performed in FY 00-01. The second largest project, purchase of replacement buses, requires \$1,520,118 in District funding. The third largest project, engine repowering, requires \$2,125,000 in District funds. The capital program will be updated prior to submittal to the Board in May.

### **IV. FINANCIAL CONSIDERATIONS**

The preliminary line item budget must be approved this month in order for the District to submit claims for TDA and STA funding for FY 01-02 by the April 1<sup>st</sup> deadline.

### **V. ATTACHMENTS**

**Attachment A:** FY 01-02 Preliminary Line Item Budget

**ATTACHMENT A**

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT**

**FY 01-02**

**PRELIMINARY LINE ITEM BUDGET**

**MARCH 16, 2001**

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT**  
**FY 01-02 PRELIMINARY BUDGET**  
**OPERATING REVENUE**

REVENUE SOURCE	PROJECTED REVENUE FY 00-01	PRELIM BUDGET FY 01-02	PERCENT CHANGE
1 Passenger Fares	\$ 3,227,600	\$ 3,387,868	5.0%
2 Special Transit Fares	\$ 1,640,242	\$ 2,029,673	23.7%
3 Paratransit Fares	\$ 201,060	\$ 208,972	3.9%
4 Highway 17 Revenue	\$ 819,413	\$ 886,838	8.2%
5 Commissions	\$ 12,000	\$ 12,000	0.0%
6 Advertising Income	\$ 156,000	\$ 174,000	11.5%
7 Rent Income - SC Metro Center	\$ 84,000	\$ 85,367	1.6%
8 Rent Income -Watsonville TC	\$ 48,800	\$ 53,717	10.1%
9 Rent Income - General	\$ 7,200	\$ 7,200	0.0%
10 Interest Income	\$ 1,111,000	\$ 1,200,000	8.0%
11 Other Non-Transportation Revenue	\$ 2,600	\$ 1,000	-61.5%
12 Sales Tax	\$ 16,028,221	\$ 16,829,000	5.0%
13 Transp Dev Act (TDA) Funds	\$ 5,945,050	\$ 6,242,303	5.0%
14 Special TDA Allocation	\$ 649,889	\$	-100.0%
15 Other Local Funding	\$ -	\$	0.0%
16 FTA Sec 5303 - Strategic Imp Plan	\$ -	\$ 35,000	100.0%
17 FTA Sec 5303 - Cust Info Serv Plan	\$ -	\$ 35,000	100.0%
18 FTA Sec 5307 - Op Assistance	\$ 505,614	\$ 505,614	0.0%
19 FTA Sec 5311 - Rural Op Assistance	\$ 42,448	\$ 42,448	0.0%
20 Other Funding	\$ -	\$	0.0%
<b>TOTAL OPERATING REVENUE</b>	<b>\$ 30,481,137</b>	<b>\$ 31,736,000</b>	<b>4.1%</b>



**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
DEPARTMENTAL EXPENSES**

DEPARTMENT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE	
			FROM FY 00-01	% OF TOTAL FY 01-02
1100 Administration	1,100,486	1,181,238	7.3%	3.72%
1200 Finance	974,623	1,034,596	6.2%	3.26%
1300 Planning & Marketing	1,047,198	1,147,288	9.6%	3.62%
1400 Human Resources	529,414	561,946	6.1%	1.77%
1500 Information Technology	443,112	474,821	7.2%	1.50%
1700 District Counsel	455,981	489,280	7.3%	1.54%
2200 Facilities Maintenance	1,180,772	1,249,472	5.8%	3.94%
2400 Watsonville TC	94,994	92,812	-2.3%	0.29%
2500 Santa Cruz Metro Center	256,780	285,605	11.2%	0.90%
2600 Scotts Valley TC	126,035	123,692	-1.9%	0.39%
3100 Paratransit Program	3,246,636	3,485,430	7.4%	10.98%
3200 Operations	1,908,419	2,041,827	7.0%	6.43%
3300 Bus Operators	10,727,858	11,476,642	7.0%	36.16%
4100 Fleet Maintenance	6,761,868	7,600,828	12.4%	23.95%
9005 Retired Employee Benefits	354,602	417,879	17.8%	1.32%
Additional Operating Programs	8,054	2,645	-67.2%	0.01%
District Grant Programs/Studies	97,496	70,000	-28.2%	0.22%
Reserve for New Positions	73,498		-100.0%	0.00%
<b>SUBTOTAL OPERATING EXPENSE</b>	<b>29,387,828</b>	<b>31,736,000</b>	<b>8.0%</b>	<b>100.00%</b>
Pass Through Grant Programs	480,000		-100.0%	0.00%
Transfer to Capital Program	301,171		-100.0%	0.00%
<b>TOTAL OPERATING EXPENSES</b>	<b>30,169,000</b>	<b>31,736,000</b>	<b>5.2%</b>	<b>100.00%</b>

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
CONSOLIDATED EXPENSES**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501011 Bus Operator Pay	5,618,731	5,906,086	5.1%
501013 Bus Operator OT	841,378	1,001,812	19.1%
501021 Other Salaries	5,521,674	6,000,808	8.7%
501023 Other OT	211,271	254,400	20.4%
Totals	<u>12,193,053</u>	<u>13,163,106</u>	8.0%
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	115,727	122,774	6.1%
502021 Retirement	878,066	937,410	6.8%
502031 Medical Ins	1,943,838	2,223,686	14.4%
502041 Dental Ins	523,466	498,501	-4.8%
502045 Vision Ins	127,470	120,689	-5.3%
502051 Life Ins	66,295	62,046	-6.4%
502060 State Disability	111,547	136,640	22.5%
502061 Disability Ins	458,425	494,135	7.8%
502071 State Unemployment	28,895	27,520	-4.8%
502081 Worker's Comp	1,436,541	1,436,541	0.0%
502101 Holiday Pay	258,729	281,094	8.6%
502103 Floating Holiday	49,300	54,600	10.8%
502109 Sick Leave	598,511	648,977	8.4%
502111 Vacation	1,286,920	1,379,201	7.2%
502121 Other Paid Absence	132,469	150,285	13.4%
502251 Phys. Exam - Renewal	6,072	8,404	38.4%
502253 Driver Lic Renewal	3,658	4,436	21.3%
502999 Other Fringe Benefits	14,968	15,568	4.0%
Totals	<u>8,040,897</u>	<u>8,602,506</u>	7.0%
<b>SERVICES</b>			
503011 Accting/Audit Fees	218,500	80,500	-63.2%
503012 Admin/Bank Fees	194,510	194,720	0.1%
503031 Professional/Technical & Fees	273,425	274,700	0.5%
503032 Legislative Services	70,300	75,700	7.7%
503033 Legal Services	10,000	10,000	0.0%
503034 Employment Exams	12,490	13,380	7.1%
503041 Temp Help	81,344	43,840	-46.1%
503161 Custodial Services	86,820	76,379	-12.0%
503162 Uniforms/Laundry	38,497	34,496	-10.4%
503171 Security Services	297,843	272,938	-8.4%
503221 Classified/Legal Ads	7,000	24,950	256.4%
503222 Legal Ads	8,500		-100.0%
503225 Graphics Services	27,000	30,000	11.1%
503351 Building Repair - Out	37,893	25,680	-32.2%
503352 Equip Repair - Out	121,635	162,011	33.2%
503353 Rev Veh Repair - Out	175,000	197,900	13.1%
503354 Other Veh Repair - Out	70,000	74,700	6.7%
503361 Waste Oil Disposal	5,000	-	-100.0%
503363 Haz Waste Disposal	16,085	24,238	50.7%
Totals	<u>1,751,842</u>	<u>1,616,132</u>	-7.7%

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
CONSOLIDATED EXPENSES**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>PURCHASED TRANSPORTATION</b>			
503405 Contract Transp	400	300	-25.0%
503406 Contract/Paratransit	3,033,966	3,404,730	12.2%
Totals	3,034,366	3,405,030	12.2%
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	130,637	137,305	5.1%
504012 Fuels & Lubricants - Rev Veh	1,498,000	1,867,094	24.6%
504021 Tires & Tubes	150,000	160,000	6.7%
504161 Other Mobile Supplies	2,500	8,500	240.0%
504181 Upholstery Supplies	5,000		-100.0%
504191 Rev Vehicle Parts	603,885	745,000	23.4%
504192 Inventory Adjustment			0.0%
Totals	2,390,022	2,917,899	22.1%
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504205 Freight Out	2,650	2,475	-6.6%
504211 Postage & Mailing	14,575	17,047	17.0%
504213 Mktg/Graphics Supp	1,757		-100.0%
504214 Promotional Items	5,450	6,500	19.3%
504215 Printing	96,286	111,531	15.8%
504217 Photo Supp/Process	8,655	12,905	49.1%
504311 Office Supplies	67,717	76,395	12.8%
504313 Computer Supplies	4,000		-100.0%
504315 Safety Supplies	17,928	31,713	76.9%
504317 Cleaning Supplies	26,000	86,556	232.9%
504319 Custodial Supplies	44,400		-100.0%
504409 Repair/Maint Supply	51,202	77,404	51.2%
504413 Electrical Supplies	13,453		-100.0%
504415 Plumbing Supplies	10,979		-100.0%
504417 Mechanical Supplies	9,133		-100.0%
504419 Landscaping Supplies	3,213		-100.0%
504421 Non-Inventory Parts	50,000	58,000	16.0%
504511 Small Tools	9,500	10,557	11.1%
504515 Employee Tools	3,600	4,000	11.1%
504517 Tool Allowance	8,580	8,910	3.8%
Totals	449,078	503,993	12.2%
<b>UTILITIES</b>			
505011 Gas & Electric	138,362	171,475	23.9%
505021 Water & Garbage	90,764	85,582	-5.7%
505031 Telecommunications	82,953	78,252	-5.7%
Totals	312,079	335,309	7.4%

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
CONSOLIDATED EXPENSES**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>CASUALTY &amp; LIABILITY COSTS</b>			
506011 Insurance - Property	60,000	60,000	0.0%
506015 Insurance - PL/PD	100,000	116,000	16.0%
506021 Insurance - Other	15,000	15,000	0.0%
506123 Settlement Costs	100,000	100,000	0.0%
506127 Repair - District Prop	11,750	11,750	0.0%
506129 Other Prof Fees	30,000		-100.0%
506999 Other Casualty Exp	500	30,500	6000.0%
Totals	<u>317,250</u>	<u>333,250</u>	5.0%
<b>TAXES</b>			
507051 Fuel Tax	11,200	9,984	-10.9%
507201 Licenses & Permits	10,350	12,995	25.6%
507999 Other Taxes	22,722	22,301	-1.9%
Totals	<u>44,272</u>	<u>45,280</u>	2.3%
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	43,464	46,093	6.0%
509081 Advertising-Promo	59,900	50,000	-16.5%
509101 Incentive Program	15,135	15,892	5.0%
509121 Employee Training	42,170	44,615	5.8%
509123 Travel	61,250	64,745	5.7%
509125 Other Misc. Expenses	6,875	9,299	35.3%
509127 Board Fees	13,200	13,200	0.0%
509150 Contributions	300	300	0.0%
Totals	<u>242,294</u>	<u>244,144</u>	0.8%
<b>LEASES&amp;RENTALS</b>			
512011 Facility Lease	520,747	551,702	5.9%
512061 Equipment Rental	18,429	17,649	-4.2%
Totals	<u>539,176</u>	<u>569,351</u>	5.6%

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
CONSOLIDATED EXPENSES**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
RESERVE FOR NEW POSITIONS	73,498		-100.0%
PERSONNEL TOTAL	20,233,951	21,765,613	7.6%
NON-PERSONNEL TOTAL	9,080,379	9,970,388	9.8%
<b>DEPARTMENT TOTALS</b>	<b>29,387,828</b>	<b>31,736,000</b>	<b>8.0%</b>
TRANSFER TO CAPITAL	301,171		-100.0%
PASS-THROUGH PROGRAMS	480,000		-100.0%
<b>TOTAL OPERATING EXPENSE</b>	<b>30,169,000</b>	<b>31,736,000</b>	<b>5.2%</b>

**ADMINISTRATION**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Administration - 1100**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501021 Other Salaries	350,646	374,981	6.9%
501023 Other OT	2,400	2,400	0.0%
<b>Totals</b>	<b>353,046</b>	<b>377,381</b>	<b>6.9%</b>
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	6,118	6,022	-1.6%
502021 Retirement	29,579	31,270	5.7%
502031 Medical Ins	33,324	35,003	5.0%
502041 Dental Ins	10,662	9,848	-7.6%
502045 Vision Ins	2,524	2,012	-20.3%
502051 Life Ins	1,373	1,294	-5.8%
502060 State Disability	1,992	2,562	28.6%
502061 Disability Ins	11,029	11,436	3.7%
502071 State Unemployment	516	516	0.0%
502081 Worker's Comp	34,316	34,316	0.0%
502101 Holiday Pay	4,516	4,786	6.0%
502103 Floating Holiday	9,600	10,100	5.2%
502109 Sick Leave	18,062	19,146	6.0%
502111 Vacation	32,740	34,708	6.0%
502121 Other Paid Absence	4,000	3,000	-25.0%
502999 Other Fringe Benefits	624	624	0.0%
<b>Totals</b>	<b>200,975</b>	<b>206,644</b>	<b>2.8%</b>
<b>SERVICES</b>			
503012 Admin/Bank Fees	100	100	0.0%
503031 Professional/Technical & Fees	26,000	30,000	15.4%
503032 Legislative Services	70,300	75,700	7.7%
503041 Temp Help	2,784	5,040	81.0%
503221 Classified/Legal Ads		9,450	100.0%
503222 Legal Ads	4,500		-100.0%
503352 Equip Repair - Out	7,611	7,000	-8.0%
<b>Totals</b>	<b>111,295</b>	<b>127,290</b>	<b>14.4%</b>
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	400	530	32.5%
<b>Totals</b>	<b>400</b>	<b>530</b>	<b>32.5%</b>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504211 Postage & Mailing	9,000	10,000	11.1%
504215 Printing	9,000	10,000	11.1%
504217 Photo Supp/Process	100	100	1.0%
504311 Office Supplies	8,865	9,308	5.0%
<b>Totals</b>	<b>26,965</b>	<b>29,408</b>	<b>9.1%</b>

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Administration - 1100**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>UTILITIES</b>			
505011 Gas & Electric	21,000	26,585	26.6%
505021 Water & Garbage	4,100	4,305	5.0%
505031 Telecommunications	13,600	14,960	10.0%
Totals	<u>38,700</u>	<u>45,850</u>	18.5%
<b>TAXES</b>			
507201 Licenses & Permits			<b>0.0%</b>
507999 Other Taxes			<b>0.0%</b>
Totals			<u>0.0%</u>
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	<b>29,000</b>	31,900	10.0%
509101 Incentive Program	4,730	4,967	5.0%
509121 Employee Training			0.0%
509123 Travel	51,200	55,820	9.0%
509125 Other Misc. Expenses	4,475	7,099	58.6%
509127 Board Fees	13,200	13,200	0.0%
Totals	<u>102,605</u>	<u>112,986</u>	10.1%
<b>LEASES&amp;RENTALS</b>			
512011 Facility Lease	265,000	278,582	5.1%
512061 Equipment Rental	1,500	2,568	71.2%
Totals	<u>266,500</u>	<u>281,150</u>	5.5%
PERSONNEL TOTAL	554,021	584,025	5.4%
NON-PERSONNEL TOTAL	546,465	597,213	9.3%
DEPARTMENT TOTALS	<u><u>1,100,486</u></u>	<u><u>1,181,238</u></u>	<u>7.3%</u>

**FINANCE**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**

**Finance - 1200**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501021 Other Salaries	330,242	340,082	3.0%
501023 Other OT	1,000	1,000	0.0%
<b>Totals</b>	<b>331,242</b>	<b>341,082</b>	<b>3.0%</b>
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	2,688	2,876	7.0%
502021 Retirement	27,676	28,668	3.6%
502031 Medical Ins	40,188	46,670	16.1%
502041 Dental Ins	11,956	12,338	3.2%
502045 Vision Ins	2,903	2,682	-7.6%
502051 Life Ins	1,729	1,630	-5.7%
502060 State Disability	2,656	3,416	28.6%
502061 Disability Ins	10,319	10,484	1.6%
502071 State Unemployment	688	688	0.0%
502081 Worker's Comp	12,865	12,865	0.0%
502101 Holiday Pay	4,200	4,470	6.4%
502103 Floating Holiday	6,100	6,500	6.6%
502109 Sick Leave	16,799	17,880	6.4%
502111 Vacation	34,830	37,414	7.4%
502121 Other Paid Absence	3,200	3,200	0.0%
502999 Other Fringe Benefits	624	624	0.0%
<b>Totals</b>	<b>179,421</b>	<b>192,406</b>	<b>7.2%</b>
<b>SERVICES</b>			
503011 Accting/Audit Fees	68,000	80,000	17.6%
503012 Admin/Bank Fees	194,400	194,600	0.1%
503031 Professional/Technical & Fees	12,000	20,000	66.7%
503041 Temp Help	1,000	1,000	0.0%
503352 Equip Repair - Out	1,000	1,000	0.0%
<b>Totals</b>	<b>276,400</b>	<b>296,600</b>	<b>7.3%</b>
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	325	400	23.1%
<b>Totals</b>	<b>325</b>	<b>400</b>	<b>23.1%</b>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504211 Postage & Mailing	315	200	-36.5%
504215 Printing	1,350	1,500	11.1%
504311 Office Supplies	4,000	5,000	25.0%
<b>Totals</b>	<b>5,665</b>	<b>6,700</b>	<b>18.3%</b>
<b>UTILITIES</b>			
505031 Telecommunications	1,600	1,600	0.0%
<b>Totals</b>	<b>1,600</b>	<b>1,600</b>	<b>0.0%</b>
<b>CASUALTY &amp; LIABILITY COSTS</b>			



**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Finance - 1200**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
506011 Insurance - Property	60,000	60,000	0.0%
506015 Insurance - PL/PD	100,000	116,000	16.0%
506021 Insurance - Other	15,000	15,000	0.0%
Totals	<u>175,000</u>	<u>191,000</u>	<u>9.1%</u>
<b>TAXES</b>			
507201 Licenses & Permits	200	200	0.0%
507999 Other Taxes			0.0%
Totals	<u>200</u>	<u>200</u>	<u>0.0%</u>
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	1,500	1,200	-20.0%
509101 Incentive Program	2,770	2,909	5.0%
509123 Travel	500	500	0.0%
509999 Other Misc Expense			<b>0.0%</b>
Totals	<u>4,770</u>	<u>4,609</u>	<u>-3.4%</u>
<b>LEASES &amp; RENTALS</b>			
512061 Equipment Rental			<b>0.0%</b>
Totals			<u>0.0%</u>
 PERSONNEL TOTAL	 510,663	 533,488	 4.5%
NON-PERSONNEL TOTAL	463,960	501,109	8.0%
DEPARTMENT TOTALS	<u><u>974,623</u></u>	<u><u>1,034,596</u></u>	<u><u>6.2%</u></u>

**PLANNING & MARKETING**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Planning & Marketing - 1300**

ACCOUNT		FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01	
<b>LABOR</b>					
501021	Other	Salaries	512,225	554,937	8.3%
501023	Other	OT	1,700	2,000	17.6%
Totals			513,925	556,937	8.4%
<b>FRINGE BENEFITS</b>					
502011	Medicare/SS		4,553	5,035	10.6%
502021	Retirement		42,735	46,390	8.6%
502031	Medical	Ins	73,272	87,507	19.4%
502041	Dental	Ins	24,026	20,243	-15.7%
502045	Vision	Ins	5,835	5,029	-13.8%
502051	Life	Ins	2,825	2,666	-5.6%
502060	State	Disability	4,980	6,405	28.6%
502061	Disability	Ins	15,934	16,966	6.5%
502071	State	Unemployment	1,290	1,290	0.0%
502081	Worker's	Comp	70,810	70,810	0.0%
502101	Holiday	Pay	6,469	6,994	8.1%
502103	Floating	Holiday	3,500	3,700	5.7%
502109	Sick	Leave	25,876	27,978	8.1%
502111	Vacation		58,431	63,110	8.0%
502121	Other	Paid Absence	4,000	6,000	50.0%
502999	Other	Fringe Benefits	312	312	0.0%
Totals			344,848	370,435	7.4%
<b>SERVICES</b>					
503031	Professional/Technical & Fees		20,000	20,000	0.0%
503041	Temp Help		3,000	3,000	0.0%
503225	Graphics Services		27,000	30,000	11.1%
503352	Equip Repair - Out		1,500	1,800	20.0%
Totals			51,500	54,800	6.4%
<b>MOBILE MATERIALS &amp; SUPPLIES</b>					
504011	Fuels & Lubricants		325	325	0.0%
Totals			325	325	0.0%
<b>OTHER MATERIALS &amp; SUPPLIES</b>					
504211	Postage & Mailing		3,400	4,730	39.1%
504213	Mktg/Graphics Supp		200		-100.0%
504214	Promotional Items		5,000	6,000	20.0%
504215	Printing		53,500	69,900	30.7%
504217	Photo Supp/Process		4,000	6,100	52.5%
504311	Office Supplies		7,100	10,430	46.9%
Totals			73,200	97,160	32.7%
<b>UTILITIES</b>					
505031	Telecommunications		8,100	8,100	0.0%
Totals			8,100	8,100	0.0%

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Planning & Marketing - 1300**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>TAXES</b>			
507201 Licenses & Permits	1,400	3,360	140.0%
Totals	<u>1,400</u>	<u>3,360</u>	<u>140.0%</u>
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	1,300	1,356	4.3%
509081 Advertising-Promo	46,400	50,000	7.8%
509101 Incentive Program	300	315	5.0%
509125 Other Misc. Expenses	1,400		-100.0%
509150 Contributions	300	300	0.0%
Totals	<u>49,700</u>	<u>51,971</u>	<u>4.6%</u>
<b>LEASES &amp; RENTALS</b>			
512061 Equipment Rental	4,200	4,200	0.0%
Totals	<u>4,200</u>	<u>4,200</u>	<u>0.0%</u>
<b>PERSONNEL TOTAL</b>	<b>858,773</b>	<b>927,372</b>	<b>8.0%</b>
<b>NON-PERSONNEL TOTAL</b>	<b>188,425</b>	<b>219,916</b>	<b>16.7%</b>
<b>DEPARTMENT TOTALS</b>	<b><u>1,047,198</u></b>	<b><u>1,147,288</u></b>	<b><u>9.6%</u></b>

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Human Resources - 1400**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501021 Other Salaries	257,268	276,574	7.5%
501023 Other OT	3,300	1,500	-54.5%
<b>Totals</b>	<b>260,568</b>	<b>278,074</b>	<b>6.7%</b>
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	4,250	4,440	4.5%
502021 Retirement	21,972	23,094	5.1%
502031 Medical Ins	33,984	35,003	3.0%
502041 Dental Ins	8,516	8,354	-1.9%
502045 Vision Ins	2,002	2,012	0.5%
502051 Life Ins	1,373	1,294	-5.8%
502060 State Disability	1,992	2,562	28.6%
502061 Disability Ins	8,193	8,446	3.1%
502071 State Unemployment	516	516	0.0%
502081 Worker's Comp	25,842	25,842	0.0%
502101 Holiday Pay	3,379	3,574	5.8%
502103 Floating Holiday	6,000	6,300	5.0%
502109 Sick Leave	13,517	14,297	5.8%
502111 Vacation	23,026	26,772	16.3%
502121 Other Paid Absence	3,200	2,400	-25.0%
502999 Other Fringe Benefits	11,124	11,124	0.0%
<b>Totals</b>	<b>168,886</b>	<b>176,030</b>	<b>4.2%</b>
<b>SERVICES</b>			
503031 Professional/Technical & Fees	29,580	29,500	-0.3%
503034 Employment Exams	12,490	13,380	7.1%
503041 Temp Help	8,250	4,800	-41.8%
503221 Classified/Legal Ads	7,000	10,000	42.9%
503352 Equip Repair - Out	650	650	0.0%
<b>Totals</b>	<b>57,970</b>	<b>58,330</b>	<b>0.6%</b>
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	1,000	1,000	0.0%
<b>Totals</b>	<b>1,000</b>	<b>1,000</b>	<b>0.0%</b>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504211 Postage & Mailing	360	492	36.7%
504215 Printing	1,750	4,220	141.1%
504217 Photo Supp/Process	250	600	140.0%
504311 Office Supplies	5,000	5,000	0.0%
<b>Totals</b>	<b>7,360</b>	<b>10,312</b>	<b>40.1%</b>
<b>UTILITIES</b>			
505031 Telecommunications	2,800	2,800	0.0%
<b>Totals</b>	<b>2,800</b>	<b>2,800</b>	<b>0.0%</b>

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Human Resources - 1400**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	2,760	2,960	7.2%
509081 Advertising-Promo	3,000		-100.0%
509101 Incentive Program			0.0%
509121 Employee Training	24,370	28,815	18.2%
509123 Travel	200	2,925	1362.5%
509125 Other Misc. Expenses	500	700	40.0%
Totals	<u>30,830</u>	<u>35,400</u>	<u>14.8%</u>
 PERSONNEL TOTAL	 429,454	 454,104	 5.7%
 NON-PERSONNEL TOTAL	 99,960	 107,842	 7.9%
 DEPARTMENT TOTALS	 <u><u>529,414</u></u>	 <u><u>561,946</u></u>	 <u><u>6.1%</u></u>

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Information Technology - 1500**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501021 Other Salaries	230,296	244,933	6.4%
501023 Other OT	1,800	1,500	-16.7%
<b>Totals</b>	<b>232,096</b>	<b>246,433</b>	<b>6.2%</b>
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	3,773	3,959	4.9%
502021 Retirement	19,258	20,410	6.0%
502031 Medical Ins	26,220	23,335	-11.0%
502041 Dental Ins	5,978	3,759	-37.1%
502045 Vision Ins	1,452	1,341	-7.6%
502051 Life Ins	1,016	957	-5.8%
502060 State Disability	1,328	1,708	28.6%
502061 Disability Ins	7,180	7,464	4.0%
502071 State Unemployment	344	344	0.0%
502081 Worker's Comp	1,926	1,926	0.0%
502101 Holiday Pay	3,033	3,167	4.4%
502103 Floating Holiday	6,600	6,800	3.0%
502109 Sick Leave	12,133	12,668	4.4%
502111 Vacation	21,051	22,001	4.5%
502121 Other Paid Absence	2,000	2,000	0.0%
502999 Other Fringe Benefits	624	624	0.0%
<b>Totals</b>	<b>113,916</b>	<b>112,463</b>	<b>-1.3%</b>
<b>SERVICES</b>			
503031 Professional/Technical & Fees	6,800	7,000	2.9%
503352 Equip Repair - Out	43,675	67,000	53.4%
<b>Totals</b>	<b>50,475</b>	<b>74,000</b>	<b>46.6%</b>
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	500	500	0.0%
<b>Totals</b>	<b>500</b>	<b>500</b>	<b>0.0%</b>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504211 Postage & Mailing	25	100	300.0%
504215 Printing	250	125	-50.0%
504311 Office Supplies	13,500	14,000	3.7%
504313 Computer Supplies	4,000		-100.0%
<b>Totals</b>	<b>17,775</b>	<b>14,225</b>	<b>-20.0%</b>
<b>UTILITIES</b>			
505031 Telecommunications	12,000	12,500	4.2%
<b>Totals</b>	<b>12,000</b>	<b>12,500</b>	<b>4.2%</b>

MISC EXPENSE

3/1/01

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Information Technology - 1500**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
509011 Dues/Subscriptions	200	200	0.0%
509121 Employee Training	15,000	13,000	-13.3%
509123 Travel	1,150	1,500	30.4%
Totals	16,350	14,700	-10.1%
PERSONNEL TOTAL	346,012	358,896	3.7%
NON-PERSONNEL TOTAL	97,100	115,925	19.4%
DEPARTMENT TOTALS	443,112	474,821	7.2%

**Counsel**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**

**Counsel - 1700**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501021 Other Salaries	161,371	201,579	24.9%
501023 Other OT	3,500	3,500	0.0%
Totals	164,871	205,079	24.4%
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	2,954	3,232	9.4%
502021 Retirement	15,218	16,614	9.2%
502031 Medical Ins	34,824	23,335	-33.0%
502041 Dental Ins	7,362	7,221	-1.9%
502045 Vision Ins	1,755	1,341	-23.6%
502051 Life Ins	865	815	-5.8%
502060 State Disability	1,328	1,708	28.6%
502061 Disability Ins	5,674	6,076	7.1%
502071 State Unemployment	344	344	0.0%
502081 Worker's Comp	3,036	3,036	0.0%
502101 Holiday Pay	2,369	2,587	9.2%
502103 Floating Holiday	4,900	5,100	4.1%
502109 Sick Leave	9,478	10,348	9.2%
502111 Vacation	14,286	15,727	10.1%
502121 Other Paid Absence	2,000	2,000	0.0%
502999 Other Fringe Benefits	312	312	0.0%
Totals	106,705	99,796	-6.5%
<b>SERVICES</b>			
503031 Professional/Technical & Fees	2,000	2,000	0.0%
503033 Legal Services	10,000	10,000	0.0%
503041 Temp Help	25,000	25,000	0.0%
Totals	37,000	37,000	0.0%
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	300	300	0.0%
Totals	300	300	0.0%
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504211 Postage & Mailing	100	100	0.0%
504215 Printing	300	300	0.0%
504217 Photo Supp/Process	500	500	0.0%
504311 Office Supplies	2,100	2,100	0.0%
Totals	3,000	3,000	0.0%
<b>UTILITIES</b>			
505031 Telecommunications	600	600	0.0%
Totals	600	600	0.0%
<b>CASUALTY &amp; LIABILITY COSTS</b>			
506123 Settlement Costs	100,000	100,000	0.0%



**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Counsel - 1700**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
506129 Other Prof Fees	30,000		-100.0%
506999 Other Casualty Expense	500	30,500	6000.0%
Totals	<u>130,500</u>	<u>130,500</u>	<u>0.0%</u>
<b>TAXES</b>			
507201 Licenses & Permits	55	55	0.0%
Totals	<u>55</u>	<u>55</u>	<u>0.0%</u>
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	7,000	7,000	0.0%
509121 Employee Training	2,800	2,800	0.0%
509123 Travel	3,150	3,150	0.0%
Totals	<u>12,950</u>	<u>12,950</u>	<u>0.0%</u>
 PERSONNEL TOTAL	 271,576	 304,875	 12.3%
 NON-PERSONNEL TOTAL	 184,405	 184,405	 0.0%
 DEPARTMENT TOTALS	 <u><u>455,981</u></u>	 <u><u>489,280</u></u>	 <u><u>7.3%</u></u>

# FACILITIES MAINTENANCE

## SANTA CRUZ METRO FY 01-02 OPERATING BUDGET Facilities Maintenance - 2200

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501021 Other Salaries	558,781	609,937	9.2%
501023 Other OT	17,571	16,500	-6.1%
Totals	<u>576,352</u>	<u>626,437</u>	8.7%
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	4,278	4,077	-4.7%
502021 Retirement	47,755	51,313	7.4%
502031 Medical Ins	98,484	99,175	0.7%
502041 Dental Ins	28,088	27,416	-2.4%
502045 Vision Ins	6,822	5,700	-16.4%
502051 Life Ins	3,181	3,003	-5.6%
502060 State Disability	6,640	7,259	9.3%
502061 Disability Ins	17,806	18,766	5.4%
502071 State Unemployment	1,720	1,462	-15.0%
502081 Worker's Comp	40,969	40,969	0.0%
502101 Holiday Pay	7,187	7,637	6.3%
502103 Floating Holiday	2,800	3,000	7.1%
502109 Sick Leave	28,750	30,546	6.2%
502111 Vacation	67,694	71,737	6.0%
502121 Other Paid Absence	9,000	10,182	13.1%
502999 Other Fringe Benefits	312	312	0.0%
Totals	<u>371,486</u>	<u>382,554</u>	3.0%
<b>SERVICES</b>			
503031 Professional/Technical & Fees	6,200	8,200	32.3%
503041 Temp Help	<b>10,000</b>	4,000	-60.0%
503161 Custodial Services	7,000	7,841	12.0%
503162 Uniforms/Laundry	3,436	6,200	80.4%
503171 Security Services	3,113	4,322	38.8%
503351 Building Repair - Out	14,493	12,823	-11.5%
503352 Equip Repair - Out	15,000	27,107	80.7%
503361 Waste Oil Disposal	5,000		-100.0%
503363 Haz Waste Disposal	14,000	22,409	60.1%
Totals	<u>78,242</u>	<u>92,902</u>	18.7%
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	833	909	9.1%
Totals	<u>833</u>	<u>909</u>	9.1%
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504205 Freight Out	50	75	50.0%
504213 Mktg/Graphics Supp	700		-100.0%
504215 Printing	11,411	4,036	-64.6%
504217 Photo Supp/Process	155	155	0.0%
504311 Office Supplies	2,837	4,600	62.1%
504315 Safety Supplies	6,400	11,800	84.4%
504317 Cleaning Supplies		39,000	100.0%
504319 Custodial Supplies	29,000		-100.0%

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Facilities Maintenance - 2200**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
504409 Repair/Maint Supply	47,000	57,679	22.7%
504413 Electrical Supplies	<b>9,863</b>		-100.0%
504415 Plumbing Supplies	7,654		-100.0%
504417 Mechanical Supplies	7,838		-100.0%
504419 Landscaping Supplies	2,105		-100.0%
504511 Small Tools	5,500	5,832	6.0%
<b>Totals</b>	<b>130,513</b>	<b>123,177</b>	<b>-5.6%</b>
<b>UTILITIES</b>			
505011 Gas & Electric	1,000	960	-4.0%
505021 Water & Garbage	2,200	1,634	-25.7%
505031 Telecommunications	5,800	5,800	0.0%
<b>Totals</b>	<b>9,000</b>	<b>8,394</b>	<b>-6.7%</b>
<b>CASUALTY &amp; LIABILITY COSTS</b>			
506127 Repair - District Prop	1,000	1,000	0.0%
<b>Totals</b>	<b>1,000</b>	<b>1,000</b>	<b>0.0%</b>
<b>TAXES</b>			
507201 Licenses & Permits	<b>6,859</b>	7,319	6.7%
<b>Totals</b>	<b>6,859</b>	<b>7,319</b>	<b>6.7%</b>
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	404	404	0.0%
509101 Incentive Program	340	357	5.0%
509123 Travel	200	200	0.0%
<b>Totals</b>	<b>944</b>	<b>961</b>	<b>1.8%</b>
<b>LEASES &amp; RENTALS</b>			
512061 Equipment Rental	5,543	5,819	5.0%
<b>Totals</b>	<b>5,543</b>	<b>5,819</b>	<b>5.0%</b>
<b>PERSONNEL TOTAL</b>	<b>947,838</b>	<b>1,008,991</b>	<b>6.5%</b>
<b>NON-PERSONNEL TOTAL</b>	<b>232,934</b>	<b>240,481</b>	<b>3.2%</b>
<b>DEPARTMENT TOTALS</b>	<b>1,180,772</b>	<b>1,249,472</b>	<b>5.8%</b>

**WATSONVILLE TRANSIT CENTER**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
WTC - 2400**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>SERVICES</b>			
503031 Professional/Technical & Fees			0.0%
503041 Temp Help			<b>0.0%</b>
503161 Custodial Services	32,420	26,330	-18.8%
503162 Uniforms/Laundry	350	450	28.6%
503171 Security Services	15,500	15,500	0.0%
503351 Building Repair - Out	7,400	4,895	-33.9%
503352 Equip Repair - Out	800	1,785	123.1%
503363 Haz Waste Disposal	460	600	30.4%
<b>Totals</b>	<b>56,930</b>	<b>49,560</b>	<b>-12.9%</b>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504213 Mktg/Graphics Supp	50		-100.0%
504311 Office Supplies	2,500	150	-94.0%
504315 Safety Supplies	700	700	0.0%
504317 Cleaning Supplies		7,582	0.0%
504409 Repair/Maint Supply	848	5,915	597.5%
504413 Electrical Supplies	1,000		-100.0%
504415 Plumbing Supplies	1,000		-100.0%
504417 Mechanical Supplies	100		-100.0%
504419 Landscaping Supplies	108		-100.0%
504511 Small Tools	100	1,125	1025.0%
<b>Totals</b>	<b>10,406</b>	<b>15,472</b>	<b>48.7%</b>
<b>UTILITIES</b>			
505011 Gas & Electric	13,788	16,546	20.0%
505021 Water & Garbage	9,464	9,937	5.0%
505031 Telecommunications	250	341	36.4%
<b>Totals</b>	<b>23,502</b>	<b>26,824</b>	<b>14.1%</b>
<b>CASUALTY &amp; LIABILITY COSTS</b>			
506127 Repair - District Prop	250	250	0.0%
<b>Totals</b>	<b>250</b>	<b>250</b>	<b>0.0%</b>
<b>TAXES</b>			
507201 Licenses & Permits	106	106	0.0%
<b>Totals</b>	<b>106</b>	<b>106</b>	<b>0.0%</b>
<b>MISC EXPENSE</b>			
509081 Advertising-Promo	3,500		-100.0%
<b>Totals</b>	<b>3,500</b>		<b>-100.0%</b>
<b>LEASES &amp; RENTALS</b>			
512061 Equipment Rental	300	600	100.0%
<b>Totals</b>	<b>300</b>	<b>600</b>	<b>100.0%</b>

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**WTC - 2400**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
PERSONNEL TOTAL			0.0%
NON-PERSONNEL TOTAL	94,994	92,812	<b>-2.3%</b>
DEPARTMENT TOTALS	<u>94,994</u>	<u>92,812</u>	<b><u>-2.3%</u></b>

**SANTA CRUZ METRO CENTER**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Santa Cruz Metro Center - 2500**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>SERVICES</b>			
503041 Temp Help			<b>0.0%</b>
503161 Custodial Services	600	3,550	491.7%
503162 Uniforms/Laundry	936	1,056	12.8%
503171 Security Services	180,160	202,416	12.4%
503351 Building Repair - Out	6,000	3,426	-42.9%
503352 Equip Repair - Out	493	524	6.3%
503363 Haz Waste Disposal	1,500	1,104	-26.4%
<b>Totals</b>	<b>189,689</b>	<b>212,076</b>	<b>11.8%</b>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504213 Mktg/Graphics Supp	50		-100.0%
504311 Office Supplies		150	0.0%
504315 Safety Supplies	908	1,018	12.1%
504317 Cleaning Supplies		7,968	0.0%
504319 Custodial Supplies	10,300		-100.0%
504409 Repair/Maint Supply	2,600	8,451	225.0%
504413 Electrical Supplies	1,000		-100.0%
504415 Plumbing Supplies	2,000		-100.0%
504417 Mechanical Supplies	899		-100.0%
504419 Landscaping Supplies	500		-100.0%
504511 Small Tools	300	300	0.0%
<b>Totals</b>	<b>18,557</b>	<b>17,887</b>	<b>-3.6%</b>
<b>UTILITIES</b>			
505011 Gas & Electric	17,172	24,902	45.0%
505021 Water & Garbage	15,000	17,635	17.6%
505031 Telecommunications	350	593	69.4%
<b>Totals</b>	<b>32,522</b>	<b>43,130</b>	<b>32.6%</b>
<b>CASUALTY &amp; LIABILITY COSTS</b>			
506127 Repair - District Prop	250	250	0.0%
<b>Totals</b>	<b>250</b>	<b>250</b>	<b>0.0%</b>
<b>TAXES</b>			
507201 Licenses & Permits	1,500	1,500	0.0%
507999 Other Taxes	10,000	10,000	0.0%
<b>Totals</b>	<b>11,500</b>	<b>11,500</b>	<b>0.0%</b>
<b>MISC EXPENSE</b>			
509081 Advertising-Promo	3,500		-100.0%
<b>Totals</b>	<b>3,500</b>		<b>-100.0%</b>
<b>LEASES &amp; RENTALS</b>			
512061 Equipment Rental	762	762	0.0%
<b>Totals</b>	<b>762</b>	<b>762</b>	<b>0.0%</b>

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Santa Cruz Metro Center - 2500**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
PERSONNEL TOTAL			0.0%
NON-PERSONNEL TOTAL	256,780	285,605	11.2%
DEPARTMENT TOTALS	<u>256,780</u>	<u>285,605</u>	<u>11.2%</u>

SCOTTS VALLEY TRANSIT CENTER

SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
 Scotts Valley Transit Center - 2600

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>SERVICES</b>			
503031 Professional/Technical & Fees	100	2,500	2400.0%
503041 Temp Help			<b>0.0%</b>
503161 Custodial Services	46,800	38,658	-17.4%
503162 Uniforms/Laundry	250	250	0.0%
503171 Security Services	33,280	38,200	14.8%
503351 Building Repair - Out	10,000	4,536	-54.6%
503352 Equip Repair - Out	1,945	1,945	0.0%
503363 Haz Waste Disposal	125	-125	0.0%
Totals	92,500	86,214	-6.8%
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504213 Mktg/Graphics Supp	757		-100.0%
504311 Office Supplies		757	0.0%
504315 Safety Supplies		550	0.0%
504317 Cleaning Supplies		2,906	0.0%
504319 Custodial Supplies	100		-100.0%
504409 Repair/Maint Supply	754	5,359	610.7%
504413 Electrical Supplies	1,590		-100.0%
504415 Plumbing Supplies	325		-100.0%
504417 Mechanical Supplies	296		-100.0%
504419 Landscaping Supplies	500		-100.0%
504511 Small Tools-	200	200	0.0%
Totals	4,522	9,772	116.1%
<b>UTILITIES</b>			
505011 Gas & Electric	7,788	9,346	20.0%
505021 Water & Garbage	4,000	4,677	16.9%
505031 Telecommunications	353	458	29.7%
Totals	12,141	14,480	19.3%
<b>CASUALTY &amp; LIABILITY COSTS</b>			
506127 Repair - District Prop	250	250	0.0%
Totals	250	250	0.0%
<b>TAXES</b>			
507201 Licenses & Permits	100	325	225.0%
507999 Other Taxes	12,672	12,301	-2.9%
Totals	12,772	12,626	-1.1%
<b>MISC EXPENSE</b>			
509081 Advertising-Promo	3,500		-100.0%
Totals	3,500		-100.0%
<b>LEASES &amp; RENTALS</b>			
512061 Equipment Rental	350	350	0.0%
Totals	350	350	0.0%



**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Scotts Valley Transit Center - 2600**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
PERSONNEL TOTAL			0.0%
NON-PERSONNEL TOTAL	126,035	123,692	-1.9%
DEPARTMENT TOTALS	<u>126,035</u>	<u>123,692</u>	<u>-1.9%</u>

ADA

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Paratransit Program - 3100**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
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SERVICES			
503011 Accting/Audit Fees	150,000		-100.0%
503031 Professional/Technical & Fees	61,970	80,000	100.0%
Totals	211,970	80,000	-62.3%
PURCHASED TRANS.			
503406 Contract/Paratransit	3,033,966	3,404,730	12.2%
Totals	3,033,966	3,404,730	12.2%
OTHER MATERIALS & SUPPLIES			
504211 Postage & Mailing	100	100	0.0%
504215 Printing	500	500	0.0%
504311 Office Supplies	100	100	0.0%
Totals	700	700	0.0%
PERSONNEL TOTAL			0.0%
NON-PERSONNEL TOTAL	3,246,636	3,485,430	7.4%
DEPARTMENT TOTALS	<u>3,246,636</u>	<u>3,485,430</u>	<u>7.4%</u>

**OPERATIONS**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**

**Operations - 3200**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501021 Other Salaries	1,076,459	1,165,737	8.3%
501023 Other OT	45,000	79,000	75.6%
<b>Totals</b>	<b>1,121,459</b>	<b>1,244,737</b>	<b>11.0%</b>
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	4,129	4,345	5.2%
502021 Retirement	91,395	99,081	8.4%
502031 Medical Ins	115,265	140,011	21.5%
502041 Dental Ins	33,214	35,321	6.3%
502045 Vision Ins	8,131	8,047	-1.0%
502051 Life Ins	4,402	4,465	1.4%
502060 State Disability	7,636	10,248	34.2%
502061 Disability Ins	34,077	36,235	6.3%
502071 State Unemployment	1,978	2,064	4.3%
502081 Worker's Comp	54,455	54,455	0.0%
502101 Holiday Pay	13,826	15,293	10.6%
502103 Floating Holiday	6,400	9,400	46.9%
502109 Sick Leave	55,303	61,171	10.6%
502111 Vacation	141,652	151,845	7.2%
502121 Other Paid Absence	12,000	12,000	0.0%
502251 Phys. Exam - Renewal	462	924	100.0%
502253 Driver Lic Renewal	220	616	180.0%
502999 Other Fringe Benefits	624	924	48.1%
<b>Totals</b>	<b>585,169</b>	<b>646,446</b>	<b>10.5%</b>
<b>SERVICES</b>			
503031 Professional/Technical & Fees	2,000	4,000	100.0%
503041 Temp Help			0.0%
503162 Uniforms/Laundry	500	500	0.0%
503171 Security Services	65,790	12,500	-81.0%
503352 Equip Repair - Out	3,000	4,200	40.0%
<b>Totals</b>	<b>71,290</b>	<b>21,200</b>	<b>-70.3%</b>
<b>PURCHASED TRANS.</b>			
503405 Contract Transp	400	300	-25.0%
<b>Totals</b>	<b>400</b>	<b>300</b>	<b>-25.0%</b>
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	200	200	0.0%
<b>Totals</b>	<b>200</b>	<b>200</b>	<b>0.0%</b>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504211 Postage & Mailing	800	800	0.0%
504213 Mktg/Graphics Supp			0.0%
504214 Promotional Items	200	200	0.0%
504215 Printing	14,000	15,000	7.1%
504217 Photo Supp/Process	3,000	5,000	66.7%
504311 Office Supplies	11,800	13,000	10.2%

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Operations - 3200**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
504315 Safety Supplies	300	500	66.7%
504317 Cleaning Supplies		100	0.0%
504511 Small Tools	400	100	-75.0%
Totals	<u>30,500</u>	<u>34,700</u>	13.8%
<b>UTILITIES</b>			
505011 Gas & Electric	16,000	19,200	20.0%
505021 Water & Garbage	26,000	24,000	-7.7%
505031 Telecommunications	16,000	11,000	-31.3%
Totals	<u>58,000</u>	<u>54,200</u>	-6.6%
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	200		-100.0%
509101 Incentive Program	3,940	4,137	5.0%
509121 Employee Training			0.0%
509123 Travel		200	100.0%
509125 Other Misc. Expenses	200	100	-50.0%
Totals	<u>4,340</u>	<u>4,437</u>	2.2%
<b>LEASES &amp; RENTALS</b>			
512011 Facility Lease	34,161	35,307	3.4%
512061 Equipment Rental	2,900	300	-89.7%
Totals	<u>37,061</u>	<u>35,607</u>	-3.9%
PERSONNEL TOTAL	1,706,628	1,891,183	10.8%
NON-PERSONNEL TOTAL	201,791	150,644	-25.3%
DEPARTMENT TOTALS	<u><u>1,908,419</u></u>	<u><u>2,041,827</u></u>	7.0%

**BUS OPERATORS**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Bus Operators - 3300**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501011 Bus Operator Pay	5,618,731	5,906,086	5.1%
501013 Bus Operator OT	841,378	1,001,812	19.1%
<b>Totals</b>	<b>6,460,109</b>	<b>6,907,898</b>	<b>6.9%</b>
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	62,497	68,747	10.0%
502021 Retirement	407,771	432,383	6.0%
502031 Medical Ins	888,593	1,050,084	18.2%
502041 Dental Ins	268,345	243,564	-9.2%
502045 Vision Ins	65,056	60,354	-7.2%
502051 Life Ins	32,804	30,294	-7.7%
502060 State Disability	64,403	76,860	19.3%
502061 Disability Ins	283,071	309,439	9.3%
502071 State Unemployment	16,683	15,480	-7.2%
502081 Worker's Comp	966,231	966,231	0.0%
502101 Holiday Pay	188,521	205,390	8.9%
502109 Sick Leave	314,202	342,317	8.9%
502111 Vacation	633,395	683,084	7.8%
502121 Other Paid Absence	63,069	69,503	10.2%
502131 Uniform Allowance			0.0%
502251 Phys. Exam - Renewal	4,290	5,280	23.1%
502253 Driver Lic Renewal	2,718	3,520	29.5%
502999 Other Fringe Benefits	100	100	0.0%
<b>Totals</b>	<b>4,261,749</b>	<b>4,562,630</b>	<b>7.1%</b>
<b>SERVICES</b>			
503162 Uniforms/Laundry	4,025	4,040	0.4%
<b>Totals</b>	<b>4,025</b>	<b>4,040</b>	<b>0.4%</b>
<b>MISC EXPENSE</b>			
509101 Incentive Program	1,975	2,074	5.0%
<b>Totals</b>	<b>1,975</b>	<b>2,074</b>	<b>5.0%</b>
<b>PERSONNEL TOTAL</b>	<b>10,721,858</b>	<b>11,470,528</b>	<b>7.0%</b>
<b>NON-PERSONNEL TOTAL</b>	<b>6,000</b>	<b>6,114</b>	<b>1.9%</b>
<b>DEPARTMENT TOTALS</b>	<b>10,727,858</b>	<b>11,476,642</b>	<b>7.0%</b>

**FLEET MAINTENANCE**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Fleet Maintenance - 4100**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>LABOR</b>			
501021 Other Salaries	2,044,386	2,232,048	9.2%
501023 Other OT	135,000	147,000	8.9%
<b>Totals</b>	<b>2,179,386</b>	<b>2,379,048</b>	<b>9.2%</b>
<b>FRINGE BENEFITS</b>			
502011 Medicare/SS	20,487	20,041	-2.2%
502021 Retirement	174,707	188,186	7.7%
502031 Medical Ins	296,988	326,693	10.0%
502041 Dental Ins	89,477	88,883	-0.7%
502045 Vision Ins	21,698	18,777	-13.5%
502051 Life Ins	9,955	9,567	-3.9%
502060 State Disability	18,592	23,912	28.6%
502061 Disability Ins	65,141	68,822	5.7%
502071 State Unemployment	4,816	4,816	0.0%
502081 Worker's Comp	226,091	226,091	0.0%
502101 Holiday Pay	25,229	27,196	7.8%
502103 Floating Holiday	3,400	3,700	8.8%
502109 Sick Leave	104,391	112,626	7.9%
502111 Vacation	259,815	272,803	5.0%
502121 Other Paid Absence	30,000	40,000	33.3%
502251 Phys. Exam - Renewal	1,320	2,200	66.7%
502253 Driver Lic Renewal	720	300	-58.3%
502999 Other Fringe Benefits	312	612	96.2%
<b>Totals</b>	<b>1,353,139</b>	<b>1,435,225</b>	<b>6.1%</b>
<b>SERVICES</b>			
503031 Professional/Technical & Fees	2,500	1,500	-40.0%
503041 Temp Help	31,310	1,000	-96.8%
503162 Uniforms/Laundry	29,000	22,000	-24.1%
503221 Classified/Legal Ads		5,500	0.0%
503222 Legal Ads	4,000		-100.0%
503352 Equip Repair - Out	45,961	49,000	6.6%
503353 Rev Veh Repair - Out	175,000	197,900	13.1%
503354 Other Veh Repair - Out	70,000	74,700	6.7%
<b>Totals</b>	<b>357,771</b>	<b>351,600</b>	<b>-1.7%</b>
<b>MOBILE MATERIALS &amp; SUPPLIES</b>			
504011 Fuels & Lubricants	126,754	133,141	5.0%
504012 Fuels & Lubricants - Rev Veh	1,498,000	1,867,094	24.6%
504021 Tires & Tubes	150,000	160,000	6.7%
504161 Other Mobile Supplies	2,500	8,500	240.0%
504181 Upholstery Supplies	5,000		-100.0%
504191 Rev Vehicle Parts	603,885	745,000	23.4%
504192 Inventory Adjustment			0.0%
<b>Totals</b>	<b>2,386,139</b>	<b>2,913,735</b>	<b>22.1%</b>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504205 Freight Out	2,600	2,400	-7.7%

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Fleet Maintenance - 4100**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
504211 Postage & Mailing	450	500	11.1%
504215 Printing	4,200	5,850	39.3%
504217 Photo Supp/Process	600	400	-33.3%
504311 Office Supplies	9,900	11,800	19.2%
504315 Safety Supplies	9,620	17,145	78.2%
504317 Cleaning Supplies	26,000	29,000	11.5%
504319 Custodial Supplies	1,000		-100.0%
504421 Non-Inventory Parts	50,000	58,000	16.0%
504511 Small Tools	3,000	3,000	0.0%
504515 Employee Tools	3,600	4,000	11.1%
504517 Tool Allowance	8,580	8,910	3.8%
<b>Totals</b>	<b>119,550</b>	<b>141,005</b>	<b>17.9%</b>
<b>UTILITIES</b>			
505011 Gas & Electric	61,614	73,937	20.0%
505021 Water & Garbage	30,000	23,394	-22.0%
505031 Telecommunications	21,500	19,500	-9.3%
<b>Totals</b>	<b>113,114</b>	<b>116,831</b>	<b>3.3%</b>
<b>CASUALTY &amp; LIABILITY COSTS</b>			
506127 Repair - District Prop	10,000	10,000	0.0%
<b>Totals</b>	<b>10,000</b>	<b>10,000</b>	<b>0.0%</b>
<b>TAXES</b>			
507051 Fuel Tax	11,200	9,984	-10.9%
507201 Licenses & Permits	130	130	0.0%
<b>Totals</b>	<b>11,330</b>	<b>10,114</b>	<b>-10.7%</b>
<b>MISC EXPENSE</b>			
509011 Dues/Subscriptions	1,100	1,073	-2.5%
509101 Incentive Program	1,080	1,134	5.0%
509123 Travel	4,600	200	-95.7%
509125 Other Misc. Expenses	200		-100.0%
<b>Totals</b>	<b>6,980</b>	<b>2,407</b>	<b>-65.5%</b>
<b>LEASES &amp; RENTALS</b>			
512011 Facility Lease	221,586	237,813	7.3%
512061 Equipment Rental	2,874	3,050	6.1%
<b>Totals</b>	<b>224,460</b>	<b>240,863</b>	<b>7.3%</b>
<b>PERSONNEL TOTAL</b>	<b>3,532,525</b>	<b>3,814,273</b>	<b>8.0%</b>
<b>NON-PERSONNEL TOTAL</b>	<b>3,229,344</b>	<b>3,786,555</b>	<b>17.3%</b>
<b>DEPARTMENT TOTALS</b>	<b>6,761,868</b>	<b>7,600,828</b>	<b>12.4%</b>

**Retirees**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Retired Employee Benefits - 9005**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>FRINGE BENEFITS</b>			
502031 Medical Ins	302,696	356,870	17.9%
502041 Dental Ins	35,842	41,554	15.9%
502045 Vision Ins	9,292	13,394	44.1%
502051 Life Ins	6,772	6,061	-10.5%
Totals	<u>354,602</u>	<u>417,879</u>	17.8%
 PERSONNEL TOTAL	 354,602	 417,879	 17.8%
 NON-PERSONNEL TOTAL			 0.0%
 DEPARTMENT TOTALS	 <u>354,602</u>	 <u>417,879</u>	 17.8%



SCCIC

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
SCCIC/COPS - 700**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>SERVICES</b>			
503011 Accting/Audit Fees	500	500	0.0%
503012 Admin/Bank Fees	10	20	100.0%
Totals	<u>510</u>	<u>520</u>	<u>2.0%</u>
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504211 Postage & Mailing	25	25	0.0%
504311 Office Supplies	15		-100.0%
Totals	<u>40</u>	<u>25</u>	<u>-37.5%</u>
<b>TAXES</b>			
507999 Other Taxes	50		-100.0%
Totals	<u>50</u>		<u>-100.0%</u>
<b>MISC EXPENSE</b>			
509123 Travel	200	200	0.0%
Totals	<u>200</u>	<u>200</u>	<u>0.0%</u>
PERSONNEL TOTAL			<b>0.0%</b>
NON-PERSONNEL TOTAL	800	745	-6.9%
DEPARTMENT TOTALS	<u><u>800</u></u>	<u><u>745</u></u>	<u><u>-6.9%</u></u>

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Multi-Year Strategic Implementation Plan - 9014**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
SERVICES			
503031 Professional/Technical & Fees	43,750	35,000	-20.0%
Totals	<u>43,750</u>	<u>35,000</u>	<u>-20.0%</u>
 PERSONNEL TOTAL			0.0%
 NON-PERSONNEL TOTAL	43,750	35,000	-20.0%
 DEPARTMENT TOTALS	<u><u>43,750</u></u>	<u><u>35,000</u></u>	<u><u>-20.0%</u></u>

**MASTF**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET  
MASTF - 9021**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM	% CHANGE FROM FY 00-01
<b>SERVICES</b>			
503031 Professional/Technical & Fees	25		-100.0%
Totals	25		-100.0%
<b>OTHER MATERIALS &amp; SUPPLIES</b>			
504214 Promotional Items	250	300	20.0%
504215 Printing	25	100	300.0%
504217 Photo Supp/Process	50	50	0.0%
504311 Office Supplies			<b>0.0%</b>
Totals	325	450	38.5%
<b>MISC EXPENSE</b>			
509123 Travel	50	50	0.0%
509125 Other Misc. Expenses	100	1,400	1300.0%
Totals	150	1,450	866.7%
PERSONNEL TOTAL			0.0%
NON-PERSONNEL TOTAL	500	1,900	280.0%
DEPARTMENT TOTALS	<u>500</u>	<u>1,900</u>	<u>280.0%</u>

**SERVICE & MARKETING PLAN**

**SANTA CRUZ METRO FY 01-02 OPERATING BUDGET**  
**Customer Information Services & Marketing Plan - 9030**

ACCOUNT	FY 00-01 REVISED	FY 01-02 PRELIM
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SERVICES		
503031 Professional/Technical & Fees	43,750	35,000
Totals	<u>43,750</u>	<u>35,000</u>
PERSONNEL TOTAL		
NON-PERSONNEL TOTAL	43,750	35,000
DEPARTMENT TOTALS	<u><u>43,750</u></u>	<u><u>35,000</u></u>

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
 FY 01-02 PRELIMINARY BUDGET  
 CAPITAL IMPROVEMENT PROGRAM**

PROJECT	FEDERAL SHARE	LOCAL SHARE	DISTRICT SHARE	TOTAL
<b><u>Grant-Funded Projects</u></b>				
Consolidated Operating Facility	\$ 6,483,816		\$ 1,620,954	\$ 8,104,770
Urban Bus Replacement	\$ 6,080,473		\$ 1,520,118	\$ 7,600,591
Engine Repower Project	\$ 912,000		\$ 2,125,000	\$ 3,037,000
Computer System	\$ 35,000		\$ 100,000	\$ 135,000
CNG Facilities for SCM, Ops	\$	\$100,000	\$ 300,000	\$ 400,000
Subtotal				\$ 19,277,361
<b><u>District-Funded Projects</u></b>				
Bus Stop Improvements			\$ 452,100	\$ 452,100
Software for HR, Facil Maint, Fleet Maint			\$ 75,000	\$ 75,000
Automated Telephone Info System			\$ 35,000	\$ 35,000
Facilities Repair & Improvements			\$ 128,000	\$ 128,000
Machinery/Equipment Repair & Improvements			\$ 80,000	\$ 80,000
Non-Revenue Vehicle Replacement			\$ 141,000	\$ 141,000
Office Equipment			\$ 11,000	\$ 11,000
Subtotal				\$ 922,100
<b>TOTAL CAPITAL PROJECTS</b>	<b>\$ 13,511,289</b>	<b>\$100,000</b>	<b>\$ 6,588,172</b>	<b>\$ 20,199,461</b>

**'SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
FY 01-02 PRELIMINARY BUDGET  
CAPITAL IMPROVEMENT PROGRAM**

**CAPITAL PROGRAM FUNDING**

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Federal Grants	\$ 13,511,289
State Grants	\$
Local Grants	\$ 100,000
STA Funding	\$ 847,364
District Reserves	\$ 5,492,308
Transfer from Bus Stop Improvement Reserve	\$ 248,500

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<b>TOTAL CAPITAL FUNDING</b>	<b>\$ 20,199,461</b>
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# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Bryant J. Baehr, Manager of Operations

**SUBJECT: CONSIDERATION OF APPRECIATION TO EMPLOYEES WHO  
TRANSPORTED BUSES FROM FOOTHILL TRANSIT TO SANTA CRUZ**

## I. RECOMMENDED ACTION

**Staff is recommending that the Board of Directors authorize the Chair of the Board and the General Manager to issue certificates of appreciation to Transit District employees who assisted in moving twenty (20) buses from Foothill Transit to Santa Cruz Metro.**

## II. SUMMARY OF ISSUES

- On October 20, 2000 the Board of Directors authorized the purchase of fifteen (15) buses from Foothill Transit. On November 17, 2000 the Board of Directors authorized the purchase of an additional five (5) buses from Foothill bringing the total number of buses purchased to twenty (20).
- On February 15, 2001 staff received final authorization from the Federal Transit Administration to procure the Foothill buses.
- On February 24, 2001 twenty (20) buses were transported from Foothill Transit to Santa Cruz.
- District employees involved in this project performed their duties in an exemplary fashion to ensure that all employees and buses arrived in a safe manner.

## III. DISCUSSION

On October 20, 2000 the Board of Directors authorized staff to procure fifteen (15) 1989 40 foot Gillig buses from Foothill Transit located in West Covina, California. On November 17, 2000 the Board of Directors authorized the purchase of an additional five (5) buses from Foothill Transit bringing the total number of buses to twenty (20). On February 15, 2001 staff received final authorization from the Federal Transit Administration to proceed with the purchase.

On February 22, 2001 four (4) District employees were dispatched to prepare the transition of twenty (20) buses from West Covina to Santa Cruz. On February 24, 2001 twenty (20) bus operators and two (2) supervisors were flown from San Jose to Ontario, CA and three (3) support staff were dispatched from Santa Cruz to begin the transition.

Bus operators and maintenance personnel were on-duty for up to 15 hours ensuring that the transition was successful. All District employees and the twenty (20) buses arrived safely late night on February 24, 2001.

The following employees assisted in the transition:

Richard Gabriel – Mechanic	Harry Price – Mechanic
John Aspesi – Supervisor	David Valdez – VSW Tech
Miguel Escarcega - VSW	Josh Prince – VSW
Tom Stickel – Manager of Fleet Maintenance	Bryant J. Baehr – Manager of Operations
Shelton Crutch – Transit Supervisor	John Perez – Transit Supervisor
Arlette Abacherli – Bus Operator	William Anderson – Bus Operator
Oscar Andrade – Bus Operator	Dorice Ann – Bus Operator
Juanita Archibeque – Bus Operator	Bartholomew Barry – Bus Operator
Chris Bridinger – Bus Operator	Cheryl Brondstatter – Bus Operator
Anthony Ciliberto – Bus Operator	Carolyn Conklin – Bus Operator
William DeVivo – Bus Operator	Louis Fike – Bus Operator
John Fuentes – Bus Operator	Ruth Jones – Bus Operator
Mary Kohama – Bus Operator	Peter Prince – Bus Operator
Angel Sandoval – Bus Operator	Michael Steber – Bus Operator
Miguel Urizarri – Bus Operator	Everette Wehe – Bus Operator

**IV. FINANCIAL CONSIDERATIONS**

None

**V. ATTACHMENTS**

**Attachment A: None**



# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Kim Chin, Planning and Marketing Manager

**SUBJECT: CONSIDERATION OF AMENDING THE TRANSIT DISTRICT'S PARATRANSIT PLAN AFFECTING THE ELIGIBILITY OF CURRENT PARATRANSIT USERS AND NEW APPLICANTS, INCLUDING RECERTIFICATION OF ELIGIBILITY FOR CURRENT PARATRANSIT USERS AND DISCONTINUING THE PRACTICES OF ALLOWING NEW PARATRANSIT APPLICANTS USE OF THE PARATRANSIT SERVICE PENDING PROCESSING OF THEIR APPLICATIONS. CONSIDERATION OF FINALIZING NELSON NYGAARD'S RECOMMENDATIONS FOR THE RECERTIFICATION PLAN.**

## I. RECOMMENDED ACTION

**The purpose of this staff report is to adopt the Nelson Nygaard recommendations on the Recertification Plan, and concurrently amend the Transit District's Paratransit Plan to reflect the proposed changes. The Board will receive public testimony at a public hearing as a part of this staff report prior to taking action on this recommendation.**

## II. SUMMARY OF ISSUES

- At the February 9, 2001 meeting, the Board provided direction to the consultants on eight key issues pertaining to the determination of an applicant's eligibility for paratransit service consistent with the requirements of the Americans with Disabilities Act of 1990. These key issues provide the framework for the recommended Recertification Plan.
- The Board indicated their agreement with the consultant's recommendations on Key Issues 1 through 7. In particular, Key Issue 7 dealt with the discontinuance of the 30-day temporary eligibility and the establishment of an Immediate Certification Procedure to provide an expedited response for emergency situations.
- The Board requested that the consultant provide a technical memorandum on Key Issue 8 which evaluates whether the interviews and functional testing components of the eligibility determination process should be conducted by METRO staff or if it should be contracted out. Program oversight and final approval of eligibility determinations would continue to be monitored in-house by METRO. Nelson Nygaard has prepared a technical memorandum discussing this issue and is attached for the Board's review.

- The Metro User's Group (MUG), the Metro Accessible Services Transit Forum (MASTF) and the Elderly and Disabled Technical Advisory Committee (E&D TAC), have reviewed the consultant's recommendations on key issues 1 - 8. All three committees agree with the recommendations. The E&D TAC had previously submitted a letter indicating their agreement with additional comments on several of the recommendations. The letter is attached for review.
- Should the Board take action to adopt the recommendations of the consultant on the Recertification Plan, staff recommends that the ADA Paratransit Plan be amended to reflect the proposed changes. Attached is a comparison of the current language in the plan and the proposed language for the appropriate sections in the ADA Paratransit Plan.
- In concert with the Board's direction to utilize a highly interactive approach in the development of the Recertification Plan, staff has conducted extensive community outreach and received significant public input at all stages of the project. Attached is a table that shows all outreach meetings conducted prior to the issuance of the Request for Proposals, as well as public participation after the consultants were selected.
- Also included in the attachments is a list of 77 agencies, organizations and individuals that have received various updates and technical drafts for review and comment during the course of this project. This list is a compilation of agencies notified during the development of the District's ADA Paratransit Plan, the E&D TAC mailing list provided by the Regional Transportation Commission, the MUG and MASTF mailing list, and interested parties who have contacted METRO during the course of this project.
- Copies of display advertisements announcing the November 17, 2000 workshop in which the consultants briefed the Board and the public on the progress of the Recertification Plan, and the public hearing for this board meeting are also attached.

### **III. DISCUSSION**

#### **Recertification Plan Development**

On November 18, 1994, the METRO Board of Directors adopted the 1995 Update to the District's ADA Paratransit Plan. This update laid out METRO's approach to meeting the requirements of the Americans with Disabilities Act of 1990. Passengers who believe that they meet the requirements of the ADA complete an application form, which they return to METRO for review. Once approved, each passenger is issued with a unique identification number with which they use to book paratransit trips with Lifeline, METRO's contract paratransit operator.

At the March 19, 1999 workshop, the Board reviewed the paratransit certification process and expressed concern over the rapid growth of paratransit ridership and its relative impact on the District's ability to continue providing trips to eligible passengers under the ADA. At that time, staff indicated that of the 4,899 applications received to date, none had been denied. The Board directed staff to develop a comprehensive recertification program that would accurately determine an applicant's eligibility as defined by the Americans with Disabilities Act of 1990.

The Board further directed staff to utilize an aggressive outreach program designed to involve the community and partner organizations at each step in the development of the Recertification Plan. This initiated a 24-month process in which METRO staff worked closely with interested parties in all phases of the Plan. This ranged from development of the Request for Proposal Work Scope, evaluation and selection of the consultant, stakeholder interviews once the consultant was selected, workshops to present the consultant recommendations to today's Public Hearing.

In the 24-months since then, the eligible list of applicants has grown from 4,899 to approximately 8,314 registrants. This represents a growth of 3,415 individuals or a 70% increase. To date, no applications have been denied.

The following summarizes the critical milestones in the development of the Recertification Plan:

<b>Milestone</b>	<b>Date</b>
Board directs development of Recertification Plan	March 19, 1999
Draft Materials sent to 77 agencies and individuals	April 1, 1999
Comment period closes	June 30, 1999
1 <sup>st</sup> review by MUG, MASTF, E&D TAC	July, 1999
Approval of work scope by MUG, MASTF, E&D TAC	August, 1999
RFP 99-17 issued	February 24, 2000
Pre-proposal meeting -- public invited	March 17, 2000
RFP submission deadline	April 14, 2000
Broad-based 9-member selection committee evaluates and selects consultant	May, 2000
MUG, MASTF, E&D TAC approves consultant	June, 2000
Board awards contract to Nelson Nygaard	June 16, 2000
Stakeholder interviews	June - August, 2000
Community Workshop to gain input	September, 2000
Board Workshop to gain input	November, 2000
Board Briefing on key issues	February 9, 2001
Public Hearing and Board adoption	March, 16, 2001

To ensure that the community had the maximum ability to participate in the development of the Recertification Plan, a total of 26 separate outreach efforts were made before the Request for Proposals was issued. This allowed a broad breadth of views and input on the work scope that qualified firms could respond to. Once the Request for Proposals was issued and the consultant selected, an additional 32 outreach efforts were made to maximize feedback from the public toward the creation of a Recertification Plan that was comprehensive, fair and consistent with the Americans with Disabilities Act of 1990. An attachment summarizing these 58 public outreach activities is included for the Board's review.

### **Consultant Recommendations**

At the February 9, 2001 meeting, the Board agreed with the consultant's recommendations on Key Issues 1-7. Key Issue 7 addressed the 30-day temporary eligibility and proposes to eliminate this process while concurrently an Immediate Certification Process to assist applicants in hardship or emergency situations.

The Board also requested that the consultant develop more information on Key Issue 8 that proposes to have METRO retain oversight and approval of eligibility certifications, and to contract with specialists for the interviews and, if need, functional assessments of current registrants and new applicants.

Nelson Nygaard's Technical Memorandum discussing Key Issue 8 is attached for the Board's review.

### **Amendments to the ADA Paratransit Plan**

The 1995 Update to the District's ADA Plan describes the eligibility process that METRO uses to evaluate and process applications from passengers for ADA paratransit service. Should the Board approve Nelson Nygaard's recommendations, it will be necessary to amend the ADA Plan to reflect these changes.

A summary of current and proposed language changes is attached for the Board's review.

### **Next Steps**

Following the Board's approval of the Key Issues as presented by Nelson Nygaard, the consultant and staff will implement the board's direction from the February 9, 2001 meeting to continue to work collaboratively with the community to complete development of Recertification Plan materials.

If the Board approves Key Issue 8, Metro will present a staff report to the Board in April that will propose an amendment to the contract with Nelson Nygaard to assist in the development of a competitive procurement for qualified firms to conduct interviews and functional assessments. A timeline of activities will also be developed to guide the implementation of the Recertification Plan.

#### **IV. FINANCIAL CONSIDERATIONS**

Funds have been budgeted for this project, but actions taken as a result of this study will have budgetary impact. The Board will review a proposal and budget for additional activities for Nelson Nygaard in April.

#### **V. ATTACHMENTS**

**Attachment A:** Final Recommendations for Paratransit Recertification Plan -- Nelson Nygaard Memorandum

**Attachment B:** E&D TAC Letter to METRO Board on Consultant Recommendations

**Attachment C:** Summary of Current and Proposed Amendments to the 1995 Updated ADA Paratransit Plan

**Attachment D:** Public Outreach Activities -- Pre and Post RFP Issuance

**Attachment E:** Outreach Letter and List of Agencies/Individuals Contacted

**Attachment F:** Newspaper Advertisements announcing November 17, 2000 Board Workshop, and March 16, 2001 Public Hearing

## MEMORANDUM

**To:** Les White

**From:** Richard Weiner

**Date:** March 5, 2001

**Subject:** Submission for Final Approval: ADA Paratransit Certification Recommendations

---

On February 9, 2001, the Nelson\Nygaard consulting team presented eight recommendations for ADA paratransit recertification to the METRO Board. The Board approved for further action seven out of the eight recommendations. However, on the issue of administrative responsibility for the recertification program, the Board directed the team to research the recommendation more fully so as to ensure that the Board's concern about rigorous METRO oversight be assured.

Subsequent to the Board meeting, the team presented the package of recommendations to the appropriate consumer advisory committees. MUG and MASTF both endorsed the recommendations, while the E&D TAC supported the recommendations with some qualifiers. The chief qualifiers may be paraphrased as follows:

- There should be a fourth assessment site in San Lorenzo Valley.
- Exemptions to the requirement for individuals to come for an in-person interview should include emotional and mental factors that could deter attendance at an interview, and those for whom traveling in a vehicle to the interview would cause severe discomfort.
- Assessors should be sensitive to those with variable disabilities.
- Some form of immediate eligibility should still be available, and the overall eligibility process should be as expeditious as possible.
- For renewals (after three years), a telephone call could substitute for a paper renewal in the majority of cases.

In the opinion of the consulting team, none of these modifications represents a significant objection to the original proposal, and we will take these comments into account when developing the implementation material for the recertification program.

However, the issue of administrative responsibility does bear further discussion, and that will form the core of this technical memorandum. We will first reiterate, both as a refresher and for those who were not in attendance at the meeting, the seven recommendations that have been agreed to. A discussion of the tradeoffs involved in contracting out or conducting the eligibility program in-house will follow. Finally, the memorandum will address the concerns expressed by Board members concerning administrative responsibility.

The Board has approved the following recommendations:

**#1: In-Person Assessments**

The ADA Recertification process will be based on an in-person assessment. This will take place at multiple sites in the county.

**#2: Primarily Interviews**

In most cases, the in-person assessment will be based on an interview rather than a full functional assessment.

METRO (or the contractor) will install appropriate accessories (or make a bus available) for functional assessments at one site that can be used for appeals and for the anticipated small number of assessments in which the interview does not provide sufficient information to make a determination.

**#3: No Grandparenting**

All current registrants will undergo recertification, with priority given to the most frequent users. The process should be completed within a reasonable period of time, say 18 to 24 months.

**#4: Small Number of Waivers**

All applicants will be required to come in for the interview, except for a small number of hardship cases.

METRO will provide free transportation to the assessment site.

**#5: No Paper Application for Majority of Applicants**

An application form will not be required – applicants will simply call to set up a time for an interview. For the small number of hardship cases who are unable to come in, the process will involve use of an application form or a fax from a health care professional.

**#6: Term Limits**

Eligibility will be limited to three year term limits, with a simple renewal process in the majority of cases. Renewal could be either a telephone call or a one-page form indicating no changes in functional ability or residential location that would impact on ADA eligibility status.

**#7: Immediate Needs Certification will Replace Temporary Eligibility**

METRO will replace the current 30-day temporary eligibility certification with an Immediate Need Certification. This certification will be provided in a limited number of cases, such as individuals who have to attend dialysis treatment or a medical appointment at short notice after suffering a stroke or experiencing an injury. This decision will be made at the discretion of the Eligibility Coordinator, and may require other supporting documentation. The certification will be valid until an eligibility determination has been made, preferably within one week.

**Administrative Responsibility for the Recertification Program**

While the majority of Board members gave qualified support to contracting out this function, there were some concerns expressed about the recommendation and the team was asked to further research the issue in order to address these concerns.

The following arguments were originally presented by the team for and against the recommendation:

Arguments in Favor of In-House	Arguments Against
Using METRO staff would be consistent with current practice	Using outside agency could have greater credibility in the disability community (e.g. CCCIL) and address potential political concerns
Could result in greater control of eligibility outcomes	Outside agencies already have trained staff in place with expertise in rehabilitation therapy
Would avoid adding administrative burden associated with contract selection and monitoring	Allows for greater geographic decentralization of certification process
	Need to hire and train additional METRO staff could significantly delay the process
	Keeps METRO staff at arms length from issue of the accuracy of specific determinations

The primary concerns we heard from Board members were as follows:

- Will METRO be able to retain sufficient control over the eligibility outcomes if recertification is handled by an outside entity?



- Would a contractor not have the same challenges of ramping up and ramping down staffing as the recertification process is completed?

In order to address these concerns, we have modified the recertification process as follows:

1. METRO should hire a full-time Eligibility Coordinator who will be responsible for oversight of the ADA Eligibility Program. This individual's duties will include the following:

- Monitoring of the eligibility contractor
- Final say over all eligibility outcomes
- Determination of hardship cases for exemption from in-person assessments
- Determination of hardship cases for immediate needs certification

Based on experiences in other systems with this model, we anticipate that there will be very few cases in which the Eligibility Coordinator would change the assessors' determination, but this approach does retain ultimate control of the process with METRO.

2. The interviews should be conducted by a contractor with an office in the County of Santa Cruz. The contractor will either have satellite offices or will be able to secure multiple sites for assessment centers. The contractor must have experienced rehabilitation professionals on staff or be willing to hire such staff. In order to address the issue of fluctuations in demand for certification staff, it is anticipated that a rehabilitation center, medical facility, or senior center will be better positioned to absorb such demands than a transit agency due to the different missions of these agencies.

3. There may be a need to subcontract a limited number of certification functions for applicants with disabilities requiring specialized expertise, such as visual and cognitive impairments.

## Conclusion

Based on the additional research requested by Board members, the consultant team maintains the original recommendation with a slight modification as follows:

***The eligibility certification function should be contracted out to an agency that has rehabilitation professionals on staff and credibility in the disability or senior community. This agency may need to subcontract out certain functions such as review of applications from individuals with visual or cognitive impairments if the appropriate expertise is unavailable in-house. Further, METRO must hire an Eligibility Coordinator to monitor the eligibility screening contract and oversee the appeals function. The Eligibility Coordinator will retain final control over all eligibility determinations.***

SERVICE AUTHORITY  
FOR FREEWAY  
EMERGENCIES  
(SAFE)

February 14, 2001

CONGESTION  
MANAGEMENT  
AGENCY

Jan Beautz, Chair  
Santa Cruz Metropolitan Transit District  
370 Encinal Street  
Santa Cruz, CA 95060

COMMUTE  
SOLUTIONS

**RE: Comments on the Nelson/Nygaard's ADA Paratransit Certification Recommendations**

TRANSPORTATION  
POLICY COMMITTEE

Dear Chair Beautz:

RAIL OVERSIGHT  
COMMITTEE

The Elderly and Disabled ~~Transportation~~ Advisory Committee (E/D TAC) serves as the official paratransit advisory body for Santa Cruz County. We therefore believe it is an important part of our duties to review and provide input on the Paratransit Certification Recommendations made by the consulting firm Nelson/Nygaard to the Santa Cruz Metropolitan Transit District (SCMTD).

BUDGET &  
ADMINISTRATION  
PERSONNEL  
COMMITTEE

We strongly believe that the **SCMTD** needs to improve its current certification process. As it now stands, **individuals** who are not truly eligible for paratransit are able to use the system, diverting resources **from** those who-need it. **The** consultant's recommendations are a good beginning.

INTERAGENCY  
TECHNICAL  
ADVISORY  
COMMITTEE

The changes suggested are a radical departure **from** past practice. This is necessary given the laxness of the current system, and the very real need to control the costs of ADA paratransit. However, we would **caution** against moving too far in the opposite direction. Just the act of **re-certifying** all the current registrants in the system will, very likely, result in a drop in the roles, and, at the very least, a reduction in the rate of growth

BICYCLE COMMITTEE

ELDERLY & DISABLED  
TRANSPORTATION  
ADVISORY COMMITTEE

We believe it is important we, as a community, take **measured** steps in this endeavor, **lest** we create new problems in our efforts to solve the old ones. It is important that eligibility standards and procedures are not set so tight as to deny service to individuals who have a real need for it. It is also important to consider what new services may be needed to **fill** the gap as paratransit eligibility is held to a higher standard. For example, it is likely that some seniors who currently use the

13-B-1

system will not be found to be strictly ADA eligible. The SCTMD should consider their needs in developing new programs.

Of course, the recommendations made are just a **framework**; many details still need to be developed before changes can be implemented. We appreciate that, to date, the SCTMD has **encouraged extensive** community participation in the review of the paratransit certification system. We look forward to working closely with the SCTMD and others in the community as this process moves forward.

Following are our comments on the specific recommendations made by Nelson/Nygaard:

**Recommendation #1** – We agree with the consultant’s recommendation.

**Recommendation #2** – We agree with the consultant’s recommendation.

**Recommendation #3** – We agree with the consultant’s recommendation, with following comments:

#### **Assessment Site Locations**

It is important for community access to the program that multiple sites throughout the county be available for the assessments. This has two beneficial effects:

- 1) Minimizes travel time for applicants. For many individuals, because of the nature of their disability, riding on a paratransit van can be an uncomfortable and sometimes even a **painful** experience.
- 2) Decentralizing the assessment process will make it less intimidating to applicants. We strongly recommend co-locating the assessment sites with other community services.

We recommend one assessment center in each of the following areas: San Lorenzo Valley, City of Santa Cruz, Mid-County, and Watsonville.

#### **Hardship Cases**

While we agree that the number of hardship cases should be low, it is important that a process be in place to address the issues of individuals whose disability makes coming in for an assessment problematic. The kinds of cases we envisage this hardship clause applying to include individuals with emotional or mental difficulties (whether primary or secondary to their disability), to the extent that such difficulties impair their ability to make and keep the needed appointment, and individuals for whom the act of travel in a paratransit van causes serious discomfort. We would estimate that such hardship cases would only make up 1-3% of the current registrants. In such cases, we recommend the assessment be

13-B-2

made at the applicants home or at another location agreeable to the applicant, or, alternately, that a paper application be used.

**Recommendation #4** – We agree with the consultant’s recommendation.

**Recommendation #5** – We agree with the consultant’s recommendation.

**Recommendation #6** – We agree with the consultant’s recommendation, with the following comments:

In the vast majority of cases, an interview should be sufficient to make the determination-of eligibility. It is important that the individuals making the assessment be versed in the wide variety of impairments that can make paratransit the only viable transportation option for an individual. We generally associate mobility limitations with the paratransit rider. However, other conditions, such as cardiopulmonary disorders, sensory impairments, and mental illness, could require that someone use paratransit as their primary means of transportation. Additionally, it is important to remember that the impact of many conditions (for example, multiple sclerosis) vary from day to day, so that an individual may on the day of the assessment be able to use fixed-route transit, but on another day require paratransit.

**Recommendation #7** – Some component of immediate eligibility must be included in the ADA paratransit plan. It is crucial that new mechanisms be in place before the current eligibility system is eliminated. Elements of a new system need to include:

- Guarantees that all applications will be processed in a timely manner. Applicants should be able to make an appointment within seven calendar days of contacting the District, and the-vast majority of applications should be responded to (approved or denied) within 24 hours of the assessment.
- A responsive temporary eligibility system in case of emergent needs.
- An expeditious appeals process, in case of denial.

**Recommendation #8** – We support the consultant’s recommendation with the following comments:

A phone contact could easily substitute for a paper renewal form in the majority of-cases. This is more consistent with the prior recommendation to avoid a paper application process. The need for a paper trail can be satisfied by the certifying agency issuing a written notice of renewal after the phone contact has been made.

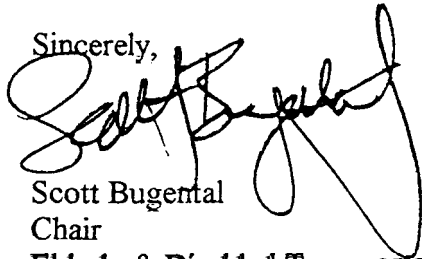
13-B-3

**Recommendation #9** – We support the consultant’s recommendation with the following comments:

It is crucial to the success of this program that the certification process is impartial, fair, and free of any appearance of a conflict of interest. We therefore believe that contracting with an outside agency that has the needed expertise and credibility in the disability community is the correct path to follow. We understand the District’s interest in overseeing the process. This oversight role is included in the consultant’s recommendation. However, the day-to-day-operations of the certification/re-certification process should be conducted by an independent agency to assure that the District’s interest in seeing cost savings from the implementation of this program does not influence the outcome of eligibility determinations.

Thank you for your consideration of our comments on the ADA Paratransit Certification Recommendations.

Sincerely,

A handwritten signature in black ink, appearing to read "Scott Bugental". The signature is fluid and cursive, with a large loop at the end.

Scott Bugental  
Chair  
Elderly & Disabled Transportation Advisory Committee

cc: Metro Accessible Services Transit Forum

13-B-A

**ADA PARATRANSIT RECERTIFICATION PUBLIC OUTREACH  
Pre-RFP Issuance**

<b>DATE</b>	<b>EVENT/GROUP</b>
04/99	Draft Material sent out to 77 agencies.
05/99	San Andreas Regional Center (SARC)
06/08/99	Santa Cruz County Regional Transportation Commission's Elderly and Disabled Transportation Advisory Committee (SCCRTC: E&D TAC)
07/14/99	Metro Users Group (MUG)
07/15/99	Metro Accessible Services Transit Forum (MASTF)
08/19/99	Metro Accessible Services Transit Forum (MASTF)
08/18/99	Metro Users Group (MUG)
09/15/99	Metro Users Group (MUG)
09/16/99	Metro Accessible Services Transit Forum (MASTF)
10/14/99	Metro Accessible Services Transit Forum (MASTF)
11/17/99	Metro Users Group (MUG)
11/18/99	Metro Accessible Services Transit Forum (MASTF)
12/14/99	Santa Cruz County Regional Transportation Commission's Elderly and Disabled Transportation Advisory Committee (SCCRTC: E&D TAC)
12/15/99	Metro Users Group (MUG)
12/16/99	Metro Accessible Services Transit Forum (MASTF)
01/19/00	Metro Users Group (MUG)
01/20/00	Metro Accessible Services Transit Forum (MASTF)
02/16/00	Metro Users Group (MUG)
02/17/00	Metro Accessible Services Transit Forum (MASTF)
03/15/00	Metro Users Group (MUG)
03/14/00	Santa Cruz County Regional Transportation Commission's Elderly and Disabled Transportation Advisory Committee (SCCRTC: E&D)
03/16/00	Metro Accessible Services Transit Forum (MASTF)
04/19/00	Metro Users Group (MUG)
04/20/00	Metro Accessible Services Transit Forum (MASTF)
05/17/00	Metro Users Group (MUG)
05/18/00	Metro Accessible Services Transit Forum (MASTF)

**ADA PARATRANSIT RECERTIFICATION PUBLIC OUTREACH  
Post-RFP Issuance**

<b>DATE</b>	<b>EVENT/GROUP</b>
06/14/00	Metro Users Group (MUG)
06/15/00	Metro Accessible Services Transit Forum (MASTF)
06/16/00	Metro Board approves selection of consultant.
06/21/00	Metro Accessible Services Transit Forum (MASTF)
07/19/00	Metro Users Group (MUG)
07/20/00	Metro Accessible Services Transit Forum (MASTF)
08/03/00	Community Forum at Loudon Nelson Community Center
08/15/00	Santa Cruz County Regional Transportation Commission's Elderly and Disabled Transportation Advisory Committee (SCCRTC: E&D)
08/16/00	Metro Users Group (MUG)
08/17/00	Metro Accessible Services Transit Forum (MASTF)
09/08/00	Metro Board Meeting
09/11/00	Seniors Commission
09/13/00	Metro Users Group (MUG)
09/14/00	Metro Accessible Services Transit Forum (MASTF)
09/14/00	Independence Square Senior Residents, Watsonville, California
09/14/00	Community Forum, University Town Center
09/22/00	METRO BOARD APPROVES DRAFT RECERTIFICATION PLAN
10/10/00	Santa Cruz County Regional Transportation Commission's Elderly and Disabled Transportation Advisory Committee (SCCRTC: E&D)
10/18/00	Metro Users Group (MUG)
10/19/00	Metro Accessible Services Transit Forum (MASTF)
11/08/00	Senior Network Services
11/15/00	Metro Users Group (MUG)
11/16/00	Metro Accessible Services Transit Forum (MASTF)
11/17/00	Metro Board Workshop (Holiday Inn)
12/13/00	Metro Users Group (MUG)
12/12/00	Santa Cruz County Regional Transportation Commission's Elderly and Disabled Transportation Advisory Committee (SCCRTC: E&D)
12/14/00	Metro Accessible Services Transit Forum (MASTF)
01/17/01	Metro Users Group (MGU)
01/18/01	Metro Accessible Services Transit Forum (MASTF)
02/13/01	Santa Cruz County Regional Transportation Commission's Elderly and Disabled Transportation Advisory Committee (SCCRTC: E&D)
02/14/01	Metro Users Group (MUG)
02/15/01	Metro Accessible Services Transit Forum (MASTF)

Santa Cruz Metropolitan  
Transit District

April 13, 1999



SAMPLE

Dear

On Friday, March 19, 1999, the Santa Cruz Metropolitan Transit (METRO) Board of Directors directed staff to develop and implement a comprehensive Passenger Recertification Program that is compliant with the Americans With Disabilities Act (ADA). We seek your active participation in this process by inviting you to comment on a draft scope of work for a Request for Proposal (RFP) for consultant services to help develop this Recertification Program.

The Recertification Program will respond to increasing demands for paratransit service by ensuring that only ADA eligible passengers use the door-to-door service. Passengers who do not meet the requirements of the ADA have other transit options, and will be offered mobility training assistance at no cost to use accessible **fixed-route** services. Recertification will involve an equitable process for reviewing the eligibility of existing passengers for paratransit service as well as developing revised standards for new passengers applying for the service.

Your input and **comments** are important to METRO as we work collectively to write draft specifications for a Request for Proposal (RFP) for consultant services. An evaluation committee comprising groups representing people with disabilities and seniors will partner with METRO to select the consultant. Once selected, the consultant will meet with passengers, disability and senior groups and others this summer to create a Draft Recertification Plan that will be reviewed for approval by the Board in October of this year.

Attached is the staff report and **timeline** approved by the Board of Directors at their March 19, 1999 meeting. Also **enclosed** are the draft specifications for a Request for Proposal (RFP) for consultant services.

We encourage you to review and respond with your written comments by Friday, April 30, 1999 to meet the approved project timeline. If you have any questions, please call me at (831)-423-0613 or John Daugherty, Accessible **Services** Coordinator at (831)-423-3868. **Thank you** for your help.

Sincerely,

A handwritten signature in black ink that reads "Kim Chin" followed by a stylized flourish.

Kim Chin  
Planning and Marketing Manager



## Stakeholder Groups Representing Seniors and People with Disabilities

The 77 groups on the METRO Mailing List that received the first draft materials on Paratransit Recertification:

Alliance for the Mentally Ill of Santa Cruz County  
**Alzheimer's** Association of Santa Cruz  
American Cancer Society  
American Red Cross  
**Cabrillo** College Disabled Student Services  
Cabrillo College Stroke Center  
**California Grey Bears**  
CASA of Santa Cruz County  
**Catholic Charities** Family Program  
**Central** Coast for Independent Living  
**Citizens Committee for the Homeless**  
City of Santa Cruz  
Community Foundation of Santa Cruz County  
**Community** options  
Davenport Resource Center  
Del Mar **Caregiver** Resource **Center** House  
Dominican Hospital Psychiatric **Services**  
Dominican Oaks  
Dominican Restorative Care Unit  
**Doran** Center for the Blind and Visually Impaired  
Easter Seal Society of Monterey Bay Region  
**Elderday** Adult Health Care Center  
Elderly & Disabled Transportation Advisory **Committee**  
Family Service Association of **Pajaro** Valley  
Family Service Association of Santa Cruz County  
Food and Nutrition Services  
Foster Grandparent Senior Companion Program  
Goodwill Industries  
Head Start  
Hospice Caring Project of Santa Cruz County  
La **Alianza** Del Valley Pajaro  
**La Posada**  
Lifespan Care Management Agency  
**Lifeline/CTSA**  
Lion Eye Fund Santa Cruz County  
**Live Oak Senior Center**  
**Mental Health Client Action Network**  
**Mental Health Services** of Santa Cruz County  
Mental Health Resource Center  
**Metro Accessible Services Transit Forum**  
**Metro Users** Group  
**Mid County Senior Center**  
**Pajaro Valley Unified School District**  
**Palomar Inn**  
**Porter-Vallejo** Community Center-Santa Cruz  
**San Andreas** Regional Center  
San **Lorenzo** Valley Unified **Schools**  
**Santa Cruz City Schools**

Santa **Cruz** Community Counseling Center  
Santa Cruz County Commission on Disabilities  
Santa **Cruz** County Health **Services** Agency  
Santa **Cruz** County **Office** of Education  
Santa Cruz County Regional **Transportation** Commission  
Santa Cruz **County** Seniors Commission  
Santa Cruz County Veterans **Service Office**  
**Scotts** Valley Senior Center  
Senior Citizens Center of Santa Cruz  
Senior Citizens Legal **Services**  
**Senior** Citizens Opportunity  
Senior Citizens Organization of San **Lorenzo** Valley  
Senior Community Service Employment Program  
Senior **Information** and Referral-Santa Cruz  
Senior Information and Referral-Watsonville  
Seniors **Council/Area** Agency on Aging  
**The Salvation Army-Santa Cruz Corps**  
The Salvation **Army-Watsonville Corps**  
The Shelter Project  
UCSC Disability Resource Center  
United Cerebral Palsy of California  
Valley Resource **Center**  
Volunteer Center of Santa Cruz County  
Watsonville Care **Center-East** and West  
Watsonville **Community** Hospital  
**Watsonville** Residential Care  
Watsonville Senior Center  
Young at **Heart** Project  
Youth Services

# Santa Cruz Metropolitan Transit District

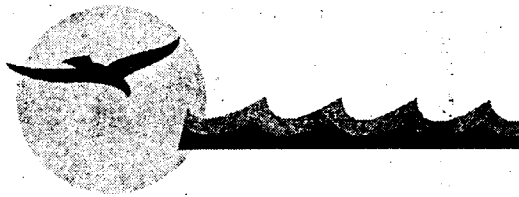
Board of Directors

workshop

**Public is urged to attend**

*To review the preliminary findings of the Recertification Study and the preliminary findings of the Comprehensive Operational & Financial Analysis of Metro's Paratransit Services as provided for in the Americans With Disabilities Act.*

**FRIDAY  
NOVEMBER 17  
1:00 PM**



**Holiday Inn  
611 Ocean St.  
Santa Cruz**

*Para revisar los hallazgos preliminares del Estudio de Recertificación y los hallazgos preliminares del Analisis Inklusivo de Operaciones y Finanzas de los Servicios de Paratransito de Metro, de acuerdo con el Acta de Americanos con Discapacidades.*

**VIERNES  
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**Se invita al público asistir**

Mesa Directiva

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SANTA CRUZ SENTINEL

11/12/00

**Board of Directors**

**Workshop**

**Public is urged to attend**

To review the preliminary findings of the Recertification Study and the preliminary findings of the Comprehensive Operational & Financial Analysis of Metro's Paratransit Services as provided for in the

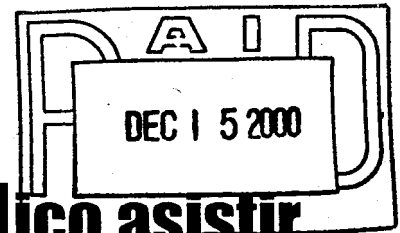
**FRIDAY  
NOVEMBER 17  
1:00 P M**



**Holiday Inn  
611 Ocean 'St.  
Santa Cruz**

Para revisar las hallazgos preliminares del Estudio de Recertificación y los hallazgos preliminares del Analisis Inclusive de Operaciones y Finanzas de los Servicios de Paratransito de Metro, de acuerdo con el Acta de Americanos con Discapacidades.

**VIERNES  
17 DE NOVIEMBRE  
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**Se invita al público asistir**

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Santa Cruz Metropolitan Transit District

Board of Directors  
**workshop**

**Public is urged to attend**

To review the preliminary findings of the Recertification Study and the preliminary findings of the Comprehensive Operational & Financial Analysis of Metro's Paratransit Services as provided for in the Americans With Disabilities Act.

**FRIDAY  
NOVEMBER 17  
1:00 PM**



**Holiday Inn  
611 Ocean St.  
Santa Cruz**

Para revisar los hallazgos preliminares del Estudio de Recertificación y los hallazgos preliminares del Analisis Inklusivo de Operaciones y Finanzas de los Servicios de Paratransito de Metro, de acuerdo con el Acta de Americanas con Discapacidades.

**VIERNES  
17 DE NOVIEMBRE  
1:00 P M**

**Se invita al público asistir**

Mesa Directiva  
**taller**

"C" TIMES, November 7, 2000: 51

"11/19 Metro Transit District

GOOD TIMES

Santa Cruz Metropolitan Transit District

Board of Directors

workshop

To review the preliminary findings of the Recertification Study and the preliminary findings of the Comprehensive Operational & Financial Analysis of Metro's Paratransit Services as provided for in the Americans With Disabilities Act

Public is urged to attend

FRIDAY  
**NOVEMBER 17**  
**1:00 P M**



**Holiday Inn**  
**611 Ocean Street**  
**Santa Cruz**

**VIERNES**  
**17 DE NOVIEMBRE**  
**1:00 P M**

Para revisar los hallazgos preliminares del Estudio de Recertificación y los hallazgos preliminares del Analisis Inklusivo de Operaciones y Finanzas de los Servicios de Paratransito de Metro, de acuerdo con el Acta de Americanos con Discapacidades.

**Se invita al público asistir**

Mesa Directiva

taller

Metro Santa Cruz  
11/8/00 issue

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
NOTICE OF PUBLIC HEARING**

**CONSIDERATION OF AMENDING THE TRANSIT  
DISTRICT'S PARATRANSIT PLAN AFFECTING THE  
ELIGIBILITY OF CURRENT PARATRANSIT USERS  
AND NEW APPLICANTS**

Notice is hereby given that a Public Hearing will be held by the Santa Cruz Metropolitan Transit District at the City of Santa Cruz Council Chambers, 809 Center St., Santa Cruz, California, at 8:30 a.m. on Friday, March 16, 2001.

The purpose of this Public Hearing is to consider amending the Transit District's Americans' with Disability Act (ADA) Paratransit Plan as follows:

- 1.) Consider recertification of the eligibility for current paratransit users;
- 2.) Consider discontinuing the practice of allowing new paratransit applicants to use the paratransit service pending the processing of their applications;
- 3.) Consider other necessary issues relating to eligibility.

The Paratransit Plan is available for review at the District's Administrative Offices, 370 Encinal St., Suite 100, Santa Cruz

*The public is invited to submit comments in writing to the General Manager of the Santa Cruz Metropolitan Transit District, dated no later than Thursday, March 15, 2001, addressed to 370 Encinal St., Suite 100, Santa Cruz, CA 95060. Or, if you prefer, you can present your comments orally at the Public Hearing on March 16, 2001.*

**DISTITO DE TRÁNSITO METROPOLITANO DE  
SANTA CRUZ (EL METRO)**

**AVISO SOBRE AUDIENCIA PÚBLICA**

**CONSIDERACION DE ENMENDAR EL PLAN  
PARATRÁNSITO DEL METRO AFECTANDO LA  
ELIGIBILIDAD DE LOS PASAJEROS PARATRÁNSITOS  
CORRIENTES Y SOLICITANTES NUEVOS**

Se anuncia que el Distrito de Tránsito Metropolitano de Santa Cruz presentará una Audiencia Pública en la Camara del Consejo Municipal de la Ciudad de Santa Cruz, 809 Center Street, Santa Cruz, California a las 8:30 de la mañana el día viernes, 16 de marzo, 2001.

El propósito de la Audiencia Pública será considerar el enmendar al Plan Paratransito del Metro del Acta de Americanos con Incapacidades como sigue:

- 1.) Considerar la recertificación de la elegibilidad para pasajeros paratransitos corrientes;
- 2.) Considerar el descontinuar la practica de permitir que los nuevos solicitantes usen el servicio paratransito durante que sus aplicaciones estan pendientes;
- 3.) Considerar otros asuntos necesarios sobre la elegibilidad.

El Plan Paratransito estará disponible para revisarse en la Oficina Administrativa del Metro, 370 Encinal Street, Suite 100, Santa Cruz.

*Se invita que el público entregue cualquier comentario escrito al Mán<sup>el</sup>ador General del Distrito de Tránsito Metropolitano de Santa Cruz, no más tarde que el día jueves, 15 de marzo 2001, dirigido a 370 Encinal Street, Suite 100, Santa Cruz, CA 95060. O, si se Prefiere, se podría presentar oralmente cualquier comentario durante de la Audiencia Pública el 16 de marzo 2001.*

*Sentinel  
3/1/01 case*

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Kim Chin, Planning and Marketing Manager

**SUBJECT: CONSIDERATION OF AMENDMENT TO CONTRACT WITH MULTISYSTEMS FOR DEVELOPMENT OF JOB DESCRIPTION FOR PARATRANSIT MANAGER, PREPARATION OF PARATRANSIT RIDERS' GUIDE AND DEVELOPMENT OF REQUEST FOR PROPOSALS FOR PARATRANSIT PROGRAM OPERATION, INCLUDING ASSISTANCE WITH PROCUREMENT PROCESS**

## **I. RECOMMENDED ACTION**

**The purpose of this staff report is to seek Board approval to authorize the General Manager to amend the existing contract with MultiSystems in the amount of \$54,500 to complete additional tasks arising from the recommendations in the Comprehensive Operational and Financial Audit of ADA Paratransit services.**

## **II. SUMMARY OF ISSUES**

- At the January 19, 2001 meeting, the Board reviewed and approved the Comprehensive Operational and Financial Audit (COFA) of Paratransit services completed by MultiSystems.
- The Board also directed staff to work with MultiSystems to identify priority action items from the COFA that required follow-up.
- In response to the board's request, MultiSystems has prepared a Technical Memorandum and budget proposing five tasks for the Board's review and consideration.

## **III. DISCUSSION**

MultiSystems provided the Board with recommendations at their January 19, 2001 Board Meeting. At that time staff was directed to work with MultiSystems to identify a series of priority actions to make changes in the ADA Paratransit Program. The first step in this process is the amendment to the existing contract with MultiSystems to perform some additional work. This work is spelled out in Attachment A. The five key tasks that they will be providing assistance in are as follows:



1. Develop a job description and advertise for an in-house Paratransit Manager.
2. Develop ADA service policies and procedures and create a comprehensive rider's guide.
3. Develop reporting standards for future contracts with paratransit providers.
4. Develop a Request for Proposals (RFP) to competitively procure paratransit service providers.
5. Provide technical recommendations in the evaluation process of qualified bidders.

The Technical Memorandum from MultiSystems discussing this proposal is attached for the Board's consideration.

The first task is critical to proceed with in an expeditious manner, the creation of the Job Description for the ADA Paratransit Manager. This will allow the job recruitment to proceed in a timely manner and then staff will be available as the other tasks are accomplished. It is important for the District staff that will be responsible for the administration of this program be on-board as the revisions to the program are being developed. Staff is recommending that the General Manager be authorized to execute a contract amendment with MultiSystems to accomplish the above work in the amount of \$54,500.

#### **IV. FINANCIAL CONSIDERATIONS**

The proposed budget from MultiSystems for completing this work is \$54,500.

#### **V. ATTACHMENTS**

MultiSystems Technical Memorandum dated February 28, 2001

February 28, 2001

MEMORANDUM

TO: Kim Chin, Manager Marketing and Planning, SCMTD  
FROM: Lynn Everett-Lee, MultiSystems  
RE: Implementation of Audit Recommendations  
CC: Mark Dorfman, Assistant General Manager, SCMTD  
Russell Thatcher, MultiSystems

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I would like to thank you for the opportunity to perform the Comprehensive Operational and Financial Audit. It has been a pleasure to work with the staff at the District, the community, and the Board of Directors.

As we discussed, here is a summary of the priority action items presented to the Board of Directors at the January meeting, and our proposal for assisting the District in completing these items.

1. Develop job description and advertise for a paratransit manager.
2. Develop service policies and procedures and create a comprehensive rider's guide
3. Develop reporting standards for future contracts
4. Develop new Request for Proposals for release
5. Participate in the evaluation process for new contract

MultiSystems proposes to perform the following work to assist you with implementation of these items.

First, we will develop a job description incorporating all of the aspects that are desired in the Paratransit Manager, as we have discussed. I have been gathering information from other properties, but have not been pleased with the requirements yet. I am still working on this.

The second item is the development of policies and procedures for customers, service providers and the district with regard to ADA complementary paratransit. I have sent some example rider's guides from several properties for your review. I expect the development of the riders guide would require three meetings with SCMTD Staff, MASTF and E/D TAC to cover all of the policy issues that need to be discussed. This will also need to incorporate the district's direction for the eligibility recertification process. Information about accessible fixed route services, the process for getting information and support services should all be addressed in the riders guide. We will also work with your graphics and printing contractors to design the riders guide for readability and consistency with SCMTD's graphic standards.

February 28, 2001

Page 2

Upon Board approval of the policies and procedures for ADA complementary paratransit service, MultiSystems proposes to develop the Request for Proposal document. This will incorporate:

- policies and procedures developed for the rider's guide
- operational standards including fare collection, complaints, on-time performance, late pick-ups and drop-offs, missed trips, no-shows,
- performance measures including productivity, complaints, on-time performance, and in-vehicle travel time
- schedule for penalties for non-performance
- full certification of the operator regarding compliance with the US DOT regulations for ADA complementary paratransit
- customer service standards and reporting
- trip reporting and accounting procedures for contractor and subcontractors
- auditing and monitoring of contractor and subcontractors for service performance
- Service billing and payment structure
- Estimated schedule of trip demand by month for the first year (for budgeting purposes)
- Termination clauses
- FTA certifications and District requirements

We propose to work with MASTF and E/D TAC to discuss any service quality and performance issues that are covered by the RFP to be incorporated in the future contracts. The Senior Management and District Counsel to ensure that all contract requirements of SCMTD are met. We will also be available for assistance in reviewing the proposals.

Attached is an estimate for our assistance in performing these tasks. The budget shows the hours by task, as well as the total for travel and other direct expenses. I am anticipating 6 trips over the course of these two projects. It is anticipated that there will be two meetings with MASTF, E/D TAC and SCMTD staff to develop the policies, followed by a third meeting with MASTF to present the recommended policies. This will be combined with the following Board meeting to present the policies. A similar meeting procedure will be followed for development of the RFP, with greater emphasis on working with SCMTD staff and District Counsel in its development.

Please let me know if this appears satisfactory to you, or if you have any questions or comments.

Thank you.

	1.45	47.93	0.1				
	\$54,500	\$52.72	\$36.33	\$21.00			
Detail by Subtask	\$142.08	\$97.91	\$56.60		<b>Multisystems</b>		
	Thatcher	Everett-Lee	Production		<b>Total</b>		
Prepare Job Description for Paratransit Manager	1	8			<b>9</b>		
Develop Paratransit Policies for Riders Guide	8	80			<b>88</b>		
Review policies with MASTF, E/D TAC and Board		32			<b>32</b>		
Prepare Riders Guide	4	40	16		<b>60</b>		
Develop Request for Proposals							
Develop reporting standards and forms	8	80			<b>88</b>		
Develop performance standards and measures	8	80			<b>88</b>		
Develop subcontract specifications	8	64			<b>72</b>		
Review with Board, MASTF and E/D TAC		32			<b>32</b>		
<b>Subtotal Hours</b>	<b>37</b>	<b>416</b>	<b>16</b>		<b>469</b>		
Total Labor Hours	37	416	16		469		
Total Labor Dollars	\$5,257	\$40,731	\$906		<b>46893</b>	46893	
Travel Multisystems*						\$5,586	
Telephone Multisystems						\$300	
Postage/Mailing Multisystems						\$300	
Reproduction Multisystems						\$400	
Total Direct Expenses Multisystems						\$6,586	
G&A on Direct Expenses @ 5%						\$329	
Fee on Direct Expenses @ 10%						\$692	
<b>Grand Total</b>						<b>\$54,500</b>	
*Three trips to meet with MASTF, E/D TAC, and Present Policies to Board							
*Three trips to meet with MASTF, E/D TAC, and Present Draft RFP to Board							

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001  
**TO:** Board of Directors  
**FROM:** Mark Dorfman, Assistant General Manager  
**SUBJECT: CONSIDERATION OF DISTRICT ISSUING PREPAID FARES FOR ADA PARATRANSIT SERVICE**

## I. RECOMMENDED ACTION

**The purpose of this communication is to determine if the Board of Directors wishes to institute a system of prepaid fares for ADA Paratransit Service. Staff is recommending that prepaid tickets be developed that would only be sold to individuals, and at the time of purchase that the riders names and ID number be placed on the tickets.**

## II. SUMMARY OF ISSUES

- When the ADA Paratransit System was established in 1995 the Paratransit Plan established a fare of \$2.00 based upon the regulation that limited the fare to twice the base fare on the fixed route system.
- There was no allowance for prepaid fares in the plan.
- A major consideration was to keep agencies from practicing “client dumping” onto the ADA Paratransit System.
- There was no mechanism in place that would restrict the use or sale of tickets to individuals and prevent agencies from making bulk purchases.
- During the ADA Paratransit Audit, it was determined that Lift Line was using prepaid coupons.
- Lift Line was directed to stop the use of prepaid coupons.
- A prepaid ticket system can be implemented in various ways.

## III. DISCUSSION

In 1995 the transit district was required to prepare an ADA Paratransit Plan that detailed how the transit district would comply with the requirements of the ADA. The plan that was prepared utilizing a community participation process and was adopted by the Board of Directors. The Plan was periodically updated during the first five years while the ADA Paratransit System was operating on a constrained basis. The ADA Paratransit Plan included the establishment of a fare structure for the program. Federal guidelines allowed for the maximum fare to be set at no more than two times the base fare for the fixed route system. The plan made no allowance for the use of prepaid fares. The reason for avoiding the use of prepaid fares was a serious concern that the

system would be adversely impacted if local agencies with transportation components were allowed to abandon these services and “dump” their clients onto to the ADA Paratransit System. These were anticipated to be clients that were unable to pay their own fare, and would be ineligible to use paratransit without an attendant. By utilizing prepaid fares, the responsibility for these rides would be transferred to the transit district budget.

During the course of the ADA Paratransit Audit, it was determined that Lift Line was using prepaid fares or “Green Coupons” as they were commonly called. District staff inquired as to whether these were sold to agencies and was assured that they were not. Staff then determined that the sale of these Green Coupons by Lift Line were not part of the program and instructed Lift Line to cease the sale of these coupons but to honor their use through March 7<sup>th</sup> which gave people time to use the tickets that they had purchased. In addition, at the February Board Meeting the Board requested that Lift Line refund any tickets that were not used after March 7<sup>th</sup>.

The Board has essentially four possible courses of action available. The first is not to issue prepaid tickets. The second option is for the transit district to develop a program of prepaid tickets that is targeted to the individuals that are eligible for the ADA Paratransit and would benefit from their use. The third option is for the transit district to develop a prepaid ticket program that would have no restrictions on who they are sold to. Lastly, the Board could let Lift Line distribute the green coupons as they have in the past.

Staff was opposed to the prepaid program due to the potential abuse of the program by agencies seeking to transfer their transportation responsibilities to the transit district. If a system could be developed that would allow individuals to make use of the prepaid option, but at the same time not allow agencies to purchase, staff is in full support of this type of program. It is important that the District maintain control over revenue instruments. Tickets or passes should be designed and administered by the transit district to ensure an accurate accounting for the revenue and to ensure that the benefits of the program are targeted to those individuals that require the service. Staff does not recommend that the Board authorize Lift Line to issue the coupons as they did in the past.

Staff is recommending that prepaid tickets be developed that would only be sold to individuals, and at the time of purchase that the riders names and ID number be placed on the tickets. The prepaid tickets would only be usable by the individual whose name and ID number is shown on the ticket. This would ensure that agencies are not able to make bulk purchases of tickets for their clients. If desired, limits on the amount of tickets could also be implemented.

#### **IV. FINANCIAL CONSIDERATIONS**

If prepaid fares are used and restricted to individuals riding the ADA Paratransit System there will be minimal financial impact other than the printing and distribution costs related to the tickets. If no limits are placed on the use or sale of tickets and they are made available for agency use, the financial impacts will be substantial, amounting to a subsidy of \$21 per trip.

**V. ATTACHMENTS**

**Attachment A:** Petition from Stroke Center



# Stroke Center Petition

We, the under signed Cabrillo College Stroke Center students and staff recommend that Metro management and the Santa Cruz Metro Transit Districts Board of Directors:

- (1.) continue selling green prepaid paratransit ride coupons until a permanent alternative can be devised,
- (2.) avoid making drastic changes to the present methods until the Audit/Recertification is completed and changes approved by the Santa Cruz Metro Board

\_\_\_\_\_  
*Shirley Mattison*  
 \_\_\_\_\_  
*Bob Stahl*  
 \_\_\_\_\_  
*Nancy Lee*  
 \_\_\_\_\_  
*Dana Robinson*  
 \_\_\_\_\_  
*Ken Lee*  
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*Judy Sublett*  
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*Kellian Rumpfard*  
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*Flora Tatten*  
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*Bliss Gamanishi*  
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*Lily Zamora*  
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*Robert P. Wilburn*  
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*Mary Jo Wilburn*  
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*James P. Soltau*  
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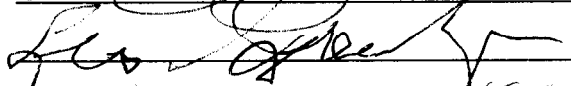
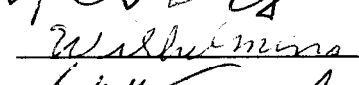
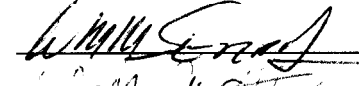
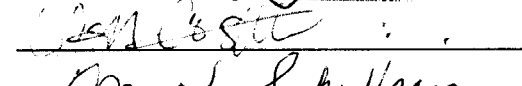
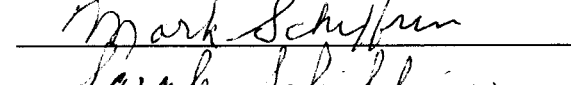
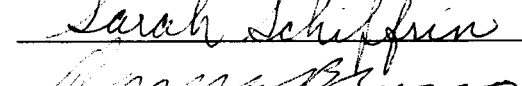


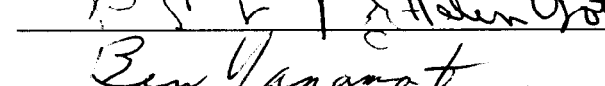
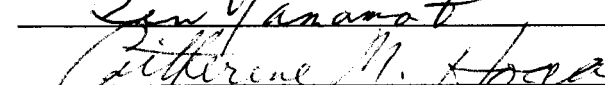
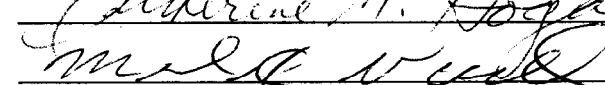




# Stroke Center Petition

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- (1.) continue selling green prepaid paratransit ride coupons until a permanent alternative can be devised,
- (2.) avoid making drastic changes to the present methods until the Audit/Recertification is completed and changes approved by the Santa Cruz Metro Board

 Caroline Bliss Isberg  
 Wilburina E. Kelly  
  
 Mark Schiffman  
 Sarah Schiffman  
 Helen Guthrie  
 Pat Spence  
 Ben Yanant  
 Catherine M. Hogan  
  
  




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Lee Wilkerson

Rev. Mark E. Bonha-Bride

Helen M. G. ...

Darwin J. Thompson

Jay Taber

Dorothy Coleman

Janice Bastiani

Jisa Slater

John Allison

Alan Strain

Jack Frank

Dorothy ...

Henry Sanders

Sally D. Hewitt



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Janya Auld  
Janya McCombie  
Bob Nielson  
Beth McKinnon  
Andrew D. LaWall  
Shannon Hess  
Virginia Obermirk  
Jan Heley OTR  
Celia Jane Wick  
Merritt Tucher  
Jim C. Gentry  
Roberto Gualtieri  
Barbara Maxwell  
W. C. Cronin



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Russell R Chandra  
Celia Ybarra  
Tom M'Carthy  
Scott Light  
Marlene Warrick  
Rodolfo Vivero  
James Goldbeck  
Indy Peretta  
Christy Nelson  
Judy L. Sho  
Bill B. Brewer Sr  
Miane Theria  
Jim Kelso  
Janet Ferrer



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Peter Antozelli  
Bill Brinkman  
Sharon T. Sanchez  
Francis J. Pedemonte  
Christina Kusler  
George Pinsonneault  
Kath Stav  
Helen Noland  
J. Staver  
Stanko Yamanishi  
Roy Joche  
Anita Rossmann  
JETHRO G O U D R E A L  
Scotty G. Joche  
1

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Mark Dorfman, Assistant General Manager

**SUBJECT: CONSIDERATION OF PROVISION OF ADA PARATRANSIT COUPONS FOR MEMBERS OF THE MASTF EXECUTIVE COMMITTEE WHO ARE ELIGIBLE TO USE THE ADA COMPLIMENTARY PARATRANSIT SERVICE**

## I. RECOMMENDED ACTION

The purpose of this request is whether the Board of Directors wishes to authorize the issuance of ADA Paratransit Coupons for members of the MASTF Executive Committee. Staff recommends that this request be granted subject to the Board action on the previous item.

## II. SUMMARY OF ISSUES

- The current Board Policy is that members of the MASTF Executive Committee receive Monthly Bus Passes to use on for the District's Fixed Route Buses.
- The MASTF Chair has written a letter requesting that ADA Paratransit users who are on the Executive Committee be eligible to receive tickets/coupons for four round trips to attend meetings.

## III. DISCUSSION

A letter was received from Kasandra Fox, MASTF Chair requesting that ADA Paratransit users who are members of the MASTF Executive Committee be provided with four round trips per month on the ADA Paratransit System to attend MASTF and Board Meetings. Currently, the Board has a policy that authorizes members of the MASTF Executive Committee to receive a Monthly Bus Pass which has a value of \$14 on the fixed route system.

As there has not been a request like this in the past, staff is bringing this item to the Board for direction. The request appears to be reasonable as it tied to attendance at meetings. In order to provide the coverage for the four meetings, the cost of the fare lost is \$16 per month, only \$2 greater than the benefit provided to fixed route users.

Since MASTF is an advisory body to the Board for the ADA, and the Executive Committee members already receive this type of benefit for use of the fixed route system, staff is recommending that fares for four round trips to attend the above meetings be approved. If the Board approves the previous item on prepaid fares, then that program can be used to fulfill this request. Should the Board not approve the prepaid fare recommendation, then staff would

recommend that the District reimburse the fares for ADA users that attend the above four meetings.

#### **IV. FINANCIAL CONSIDERATIONS**

The financial impact from this action is that ADA Paratransit users who serve on the MASTF Executive Committee will receive \$16 per month in fares. This is a monthly increase of \$2 over the amount provided to fixed route users. The above impact is only the fare impact, and does not cover the cost impact of the ride itself. If the ride is provided on the taxi system, the cost will vary according to the distance traveled.

#### **V. ATTACHMENTS**

**Attachment A:** February 28, 2001 Letter from Kasandra Fox, MASTF

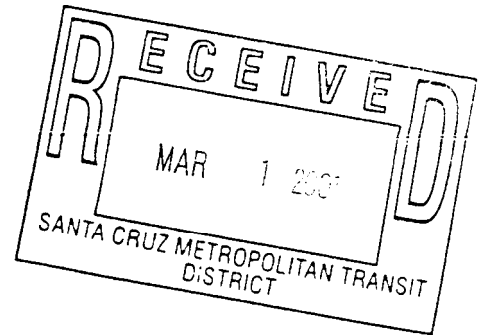


# METRO

## ACCESSIBLE SERVICES TRANSIT FORUM

920 Pacific Avenue, Suite 321, Santa Cruz, CA 95060

February 28, 2001



Mr. Les White, Manager  
Metro Transit System  
370 Encinal St., Suite 100  
Santa Cruz, CA 95060

RE: MASTF EXECUTIVE COMMITTEE PASSES

Dear Mr. White,

As you are aware, Metro very kindly provides free monthly passes to our Executive Committee members, for which we are certainly grateful.

The newest member of our committee, however, is unable to travel on regular Metro buses and must use Lift Line. This is Pat Spence.

We are respectfully requesting that you consider issuing Pat Lift Line coupons equivalent to four round trips per month. This would enable her to attend our executive meetings, our regular meetings, her Transit committee meetings and Metro Board meetings.

Thank you in advance for considering this request.

Sincerely,

A handwritten signature in cursive that reads "Kasandra Fox".

Kasandra Fox, Chair



# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** January 16, 2002

**TO:** Board of Directors

**FROM:** Mark J. Dorfman, Assistant General Manager

**SUBJECT: AUTHORIZE AN APPLICATION TO CALTRANS FOR FY2000-2001  
RURAL OPERATING ASSISTANCE**

## I. RECOMMENDED ACTION

**Adopt a resolution authorizing the Secretary/General Manager to submit a grant application to the California Department of Transportation to assist funding public transit operations in the non-urbanized part of Santa Cruz County.**

## II. SUMMARY OF ISSUES

- Each year, the Federal Transit Administration apportions federal funds through the states to assist public transit operators in non-urbanized areas.
- This year, \$ 42,448.00 has been apportioned by formula to Santa Cruz County.
- The District must define a program of projects for public transit service in the non-urbanized portion of the County and submit an application to the Caltrans Region 5 office to receive the funds.
- The attached resolution authorizes the Secretary/General Manager to coordinate with public transit providers and users, submit an application and execute a grant agreement for financial assistance under the FTA Section 5311 program for public transit projects non-urbanized areas.

## III. DISCUSSION

Under Chapter 49, United States Code Section 5311, the Federal Transit Act provides grants to be made through the states for public transit operations in non-urbanized areas. The State of California determines by formula the amount of FTA Section 5311 funds to be apportioned each year to the counties. For Santa Cruz County, the apportionment in FY 2000-2001 is \$42,448. Caltrans administers the FTA §5311 program in California.

The Section 5311 funds are available only for public transit operating assistance in non-urbanized areas, those areas within a county that lie outside of designated urban areas with over 50,000 population. As part of the grant application, the District develops a program of projects identifying the public transit service to be provided in the non-urbanized areas of Santa Cruz County. The District will make reasonable efforts to coordinate the program of projects with public transit providers and users within the service area, although no public hearing is required.

Adopting the attached resolution will authorize the General Manager to submit an application to the Caltrans District 05 Office for FTA §5311 funds. The Santa Cruz County Regional Transportation Commission will adopt the program of projects for inclusion in the Regional Transportation Improvement Plan to be incorporated into the State Transportation Improvement Program as required by the Section 5311 program.

#### **IV. FINANCIAL CONSIDERATIONS**

This grant will provide \$42,448 to the District as financial assistance to operate \$424,194.36 in non-urbanized area public transit service. The District will contribute \$381,746.36 in local matching funds to the project. The local matching funds are available in the FY2000-2001 operating budget.

#### **V. ATTACHMENTS**

**Attachment A:** Section 5311 Program of Projects

**Attachment B:** Resolution Authorizing FTA Section 5311 application

**STATE OF CALIFORNIA**  
**SECTION 5311**  
**REGIONAL**  
**PROGRAM OF PROJECTS**

County/Region: Santa Cruz County

FY 00-01 apportionment: \$ 42,448

Carryover: -0-

Total funds available: \$ 42,448

**Program of Projects**

From County/Regional Apportionment:

<b><u>Recipient</u></b>	<b><u>Project(s) * Description(s)</u></b>	<b><u>Net Project Cost</u></b>	<b><u>Federal Share</u></b>
(1) Santa Cruz Metropolitan Transit District	FY 00-01 Operating Assistance	\$424,194.36	\$ 42,448
(2)			
<b><u>Subtotal</u></b>		<b><u>\$424,194.36</u></b>	<b><u>\$ 42,448</u></b>
From: <input type="checkbox"/> State Discretionary Reserve; <input type="checkbox"/> Intercity Bus Program; <input type="checkbox"/> STP; or <input type="checkbox"/> CMAQ			
(1) <u>None</u>		\$ -0-	\$ -0-
(2)			
<b><u>Subtotal</u></b>		<b><u>\$ -0-</u></b>	<b><u>\$ -0-</u></b>
<b><u>TOTAL PROGRAMMED</u></b>		<b><u>\$424,194.36</u></b>	<b><u>\$ 42,448</u></b>

\* If an operating project, show fiscal year at project period  
 If a project for vehicle purchase, show quantity, size of vehicle accessibility, expansion or replacement.

BEFORE THE BOARD OF DIRECTORS OF THE  
SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

Resolution No. \_\_\_\_\_

On the Motion of Director: \_\_\_\_\_

Duly Seconded by Director: \_\_\_\_\_

The Following Resolution is Adopted:

**A RESOLUTION  
AUTHORIZING AN APPLICATION  
TO THE US DEPARTMENT OF TRANSPORTATION  
FOR  
FTA SECTION 5311 FY00-01 RURAL OPERATING ASSISTANCE**

**WHEREAS**, the Federal Transit Act authorizes federal grants for public transportation projects in non-urbanized areas; and

**WHEREAS**, all contracts for financial assistance impose certain obligations upon the applicant, including the provision of local share costs of the project.

**NOW, THEREFORE, BE IT RESOLVED AND ORDERED BY THE SANTA CRUZ METROPOLITAN TRANSIT DISTRICT:**

1. That the Secretary/General Manager is authorized to submit an application to the State of California Department of Transportation on behalf of the Santa Cruz Metropolitan Transit District for financial assistance to operate public transit service in non-urbanized portion of Santa Cruz County.
2. That the Secretary/General Manager is authorized to submit and file with this application all assurances and all supplemental information as required by the California Department of Transportation.
3. That the Secretary/General Manager is designated to execute standard grant agreements with the California Department of Transportation on behalf of the Santa Cruz Metropolitan Transit District to obtain \$42,448.00 in federal funds to assist with public transit projects in Fiscal Year 1999-2000 in the non-urbanized portion of Santa Cruz County costing \$424,194.36 as authorized by 49 U.S.C. Section 5311.
4. That the District has committed \$381,746.36 in local matching funds to the project.
5. That the Santa Cruz Metropolitan Transit District has, to the extent feasible, coordinated this project with other transportation providers and users in the region, including social service agencies capable of purchasing

**PASSED AND ADOPTED** this 16<sup>th</sup> day of March, 2001, by the following vote:

**AYES:** Directors -

**NOES:** Directors -

**ABSTAIN:** Directors -

**ABSENT:** Directors -

**APPROVED** \_\_\_\_\_  
SHERYL AINSWORTH  
Chairperson

**ATTEST** \_\_\_\_\_  
LESLIE R. WHITE  
General Manager

**APPROVED AS TO FORM:**

\_\_\_\_\_  
MARGARET GALLAGHER  
District Counsel

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001  
**TO:** Board of Directors  
**FROM:** Tom Stickel, Manager of Fleet Maintenance  
**SUBJECT: CONSIDERATION OF APPROVAL TO AMEND THE DAY WIRELESS SYSTEMS CONTRACT FOR AN ADDITIONAL ONE-YEAR TERM**

## I. RECOMMENDED ACTION

**District staff is recommending that the Board of Directors authorize the General Manager to execute an amendment to the contract with Day Wireless Systems to extend the term of the contract for one (1) additional year.**

## II. SUMMARY OF ISSUES

- The District has a contract (#99-10) with Day Wireless Systems for radio maintenance services.
- At the option of the District, this contract may be renewed for four (4) additional one-year terms under the same terms and conditions.
- Day Wireless Systems has indicated that they are interested in extending the contract an additional year to March 31, 2002.

## III. DISCUSSION

The District's current contract (#99-10) with Day Wireless Systems for radio maintenance service is due to expire on March 31, 2001. Day Wireless Systems has provided excellent service under this contract. An extension of the contract would be favorable to the District. Section 5.01 of the contract allows the District the option to renew the contract under the same terms and conditions for four (4) additional one-year terms. Day Wireless Systems has also reviewed the contract and has indicated their desire to extend the contract for one additional year. It is recommended that the Board of Directors authorize the General Manager to execute an amendment to the contract with Day Wireless Systems to extend the contract one (1) additional year.

## IV. FINANCIAL CONSIDERATIONS

Funds are available in the Facilities Maintenance budget for this amendment.

## V. ATTACHMENTS

Attachment A: Letter from Day Wireless Systems



Attachment A

February 12, 2001

Santa Cruz Metropolitan Transit District  
120 Du Bois Street  
Santa Cruz, CA 95060

Attn: Lloyd Longnecker

RE: District Contract #99-10 Radio Maintenance

Dear Mr. Longnecker

We have reviewed the current contract that expires March 31, 2001 and it would be our pleasure to extend our current contract through March 31, 2002.

Please call me at (408)943-6677 if you have any questions.

Sincerely

A handwritten signature in black ink, appearing to read "Reese D. Willer". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Reese D. Willer  
Service Manager

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Tom Stickel, Manager of Fleet Maintenance

**SUBJECT: CONSIDERATION OF APPROVAL TO AMEND THE MISSION LINEN AND UNIFORM SERVICE CONTRACT FOR AN ADDITIONAL ONE-YEAR TERM**

## I. RECOMMENDED ACTION

**District staff is recommending that the Board of Directors authorize the General Manager to execute an amendment to the contract with Mission Linen & Uniform Service to extend the term of the contract for one (1) additional year.**

## II. SUMMARY OF ISSUES

- The District has a contract (#99-19) with Mission Linen & Uniform Service for uniform and laundry service.
- At the option of the District, this contract may be renewed for four (4) additional one-year terms under the same terms and conditions.
- Mission Linen & Uniform Service has indicated that they are interested in extending the contract an additional year to April 20, 2002.

## III. DISCUSSION

The District's current contract (#99-19) with Mission Linen & Uniform Service for uniform and laundry service is due to expire on April 20, 2001. Mission Linen & Uniform Service has provided good service under this contract. An extension of the contract would be favorable to the District. Section 3.02 of the contract allows the District the option to renew the contract under the same terms and conditions for four (4) additional one-year terms. Mission Linen & Uniform Service has also reviewed the contract and has indicated their desire to extend the contract for one additional year. It is recommended that the Board of Directors authorize the General Manager to execute an amendment to the contract with Mission Linen & Uniform Service to extend the contract one (1) additional year.

## IV. FINANCIAL CONSIDERATIONS

Funds are available in the Fleet & Facilities Maintenance budgets for this amendment.

## V. ATTACHMENTS

Attachment A: Letter from Mission Linen & Uniform Service





# Mission Linen Supply

MISSION LINEN & UNIFORM SERVICE

## Attachment A

Santa Cruz Metropolitan  
Transit District  
Fleet Maintenance  
120 Du Bois Street  
Santa Cruz, Ca. 95060

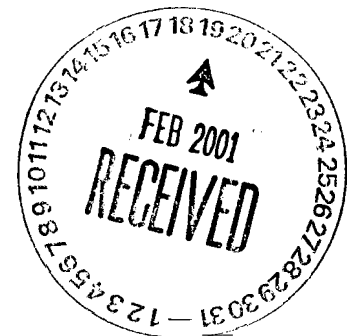
Attn: Lloyd Longnecker

On behalf of Mission Uniform and Linen Service and myself I wish to thank you for the contract extension that has been offered.

This letter is to inform you and the district that we will accept the extension and my commitment to continue to service your account with the quality and service that you are accustomed to.

Sincerely

Dave Grider  
Account Representative  
DG/dv



# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Tom Stickel, Manager of Fleet Maintenance

**SUBJECT: CONSIDERATION OF APPROVAL TO PAY FOR ADDITIONAL REPAIRS TO FREDERICK'S ELECTRONICS (PLANTRONICS) PARKING LOT EXPANSION PROJECT**

## I. RECOMMENDED ACTION

District staff is recommending that the Board authorize the General Manager to sign an amended purchase order to Earthworks for additional work to the bus parking lot located on Harvey West Blvd.

## II. SUMMARY OF ISSUES

- The District uses a parking lot on Harvey West Blvd for nighttime parking of District buses.
- The District issued a request for quotation to contractors for the expansion of the parking to accommodate additional buses procured from Foothill Transit.
- Bids were received and a purchase order was processed for the expansion.
- Upon final inspection of the work, additional base rock was authorized by the Facilities Manager to stabilize the parking area's soil.
- This construction project now exceeds \$10,000 and requires Board approval. It is requested that the Board approve this additional work and authorize the General Manager to sign an amended purchase order for payment to contractor.

## III. DISCUSSION

On January 12, 2001, a request for quotation (T-00-42) was released for the expansion of the bus parking lot on Harvey West Blvd. Three quotations were received and a purchase order was processed to Earthworks for \$6,880. The required work was completed in one day. Upon final inspection of the job site, the District's Facilities Manager noticed that in order to stabilize the parking area's soil for bus parking, an additional application of base rock on an adjacent 10' x 210' strip was required. The threat of an imminent storm required immediate attention and authorization to proceed with the additional work requirements, on a time and materials basis, was given to the contractor. The additional work was billed at \$3,280, bringing the total for all work completed to \$10,160.

California State Public Contract Code 20291 and District purchasing procedures require Board approval on all construction in excess of \$10,000. It is requested that the Board authorize the General Manager to sign an amended purchase order to Earthworks and authorize payment of the additional work that was performed.

**IV. FINANCIAL CONSIDERATIONS**

Funds are located in Repairs/Maintenance Supplies account 504409.

**V. ATTACHMENTS**

None

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Tom Stickel, Manager of Fleet Maintenance

**SUBJECT: CONSIDERATION OF APPROVAL OF NEW BUS SPECIFICATIONS TO INCLUDE THE ABILITY TO BE CONVERTED FROM DIESEL TO COMPRESSED NATURAL GAS (CNG)**

## I. RECOMMENDED ACTION

**District staff is recommending that the Board of Directors approve the specifications provided in the Invitation for Bid 00-15 and direct staff to proceed with the bidding process.**

## II. SUMMARY OF ISSUES

- The Board of Directors gave direction at the January meeting for the Fleet Manager to provide specifications for Board approval of all vehicles before going out to bid.
- District Staff has prepared an Invitation for Bid (00-15) for the procurement of new buses.
- District staff recommends that the Board of Directors approve the specifications and direct staff to proceed with the bidding process.

## III. DISCUSSION

At the January 19<sup>th</sup> Board meeting, direction was given to the Fleet Manager to obtain Board approval on all vehicle specifications prior to issuing invitation for bids. District staff has prepared an invitation for bid number 00-15 for the procurement of new buses. Staff recommends that the Board approve the specifications and direct staff to proceed with the bidding process.

## IV. FINANCIAL CONSIDERATIONS

Funds are available in the Fleet Maintenance budget for printing and legal advertisement of this invitation for bid.

## V. ATTACHMENTS

Attachment A: Summary of Bus Specification Amenities

## **ATTACHMENT A: SUMMARY OF BUS SPECIFICATION AMENITIES**

**NOTE: A COMPLETE SET OF BUS SPECIFICATIONS IS PROVIDED ON CD-ROM TO ALL BOARD MEMBERS WITH THE BOARD PACKET.**

**1. GENERAL.** Specifications are provided for Low and High Floor (both 35 and 40 foot lengths) Diesel Transit buses that can be converted alternate fuel (CNG, LNG, and LCNG) and Low and High Floor (both 35 and 40 foot lengths) Dedicated Alternate Fuel Transit buses. Up to quantities are provided as follows:

### **UP TO**

- 10\_ Each 35 Foot Low Floor Diesel Transit Buses convertible to Alternate Fuel
- 35\_ Each 40 Foot Low Floor Diesel Transit Buses convertible to Alternate Fuel
- 13\_ Each 40 Foot High Floor Diesel Suburban Buses convertible to Alternate Fuel
- 8\_ Each 35Foot Low Floor Dedicated CNG Transit Buses (OPTION)
- 8\_ Each 40 Foot Low Floor Dedicated CNG Fuel Transit Buses (ANNUAL OPTION)
- 2\_ Each 40 Foot High Floor Dedicated CNG Fuel Suburban Buses (ANNUAL OPTION)

**2. ELDERLY AND DISABLED PASSENGERS.** Buses shall comply with all applicable Federal requirements defined in the Americans with Disabilities Act, 49 CFR Part 38, and all state and local regulations regarding mobility-impaired persons.

**3. SEATING.** Passenger seats shall be arranged in a transverse, forward facing configuration, except at the wheel housings where aisle-facing seats may be arranged as appropriate with due regard for passenger access and comfort. Other areas where aisle-facing seats may be provided are at wheelchair securement areas and platforms. Passenger seating capacity with this arrangement shall be no less than 37 for the 40-foot buses and 31 passengers for the 35-foot buses not including the operator, with the specified seating arrangement.

High floor buses shall have fully cushioned seats throughout the bus. Low floor buses shall have fully cushioned seats throughout the bus with the exception of the rear bench seat. The rear bench seat shall be formed fiberglass with padded inserts. Color blue.

**4. HEADLINING.** To be antique white, gloss finish.

**5. FLOOR COVERING.** To be RCA Rubber marbled ebony black, TR-518.

**6. WINDOWS.** All side windows, except windows in passenger doors and those smaller than 500 square inches, shall have window panels that are openable by passengers. Openable window panels shall be equipped with latches that secure the window in the fully open and fully closed positions.

**7. HEATING, VENTILATION AND AIR CONDITIONING (HVAC).** With the bus running at the design operating profile with corresponding door opening cycle, and carrying a number of

passengers equal to 150 percent of the seated load, the HVAC system shall maintain an average passenger compartment temperature within a range between 65<sup>o</sup> and 80<sup>o</sup>F, while controlling the relative humidity to a value of 50 percent or less. The system shall maintain these conditions while subjected to any outside ambient temperatures within a range of 10<sup>o</sup> to 95<sup>o</sup> F and at any ambient relative humidity levels between 5 and 50 percent.

**8. PASSENGER INFORMATION.** Provisions shall be made on the rear of the operator's barrier for a frame to retain information such as routes and schedules. Advertising media 11 inches high and 0.09 inches thick shall be retained near the juncture of the bus ceiling and sidewall. The retainers may be concave and shall support the media without adhesives. The media shall be illuminated by the interior fluorescent light system.

**9. WHEELS.** Wheels and rims shall be hub-piloted, and brushed aluminum.

**10. EXTERIOR NOISE.** Airborne noise generated by the bus and measured from either side shall not exceed 83 dBA under full power acceleration when operated at or below 35 mph at curb weight and just prior to transmission upshift. The maximum noise level generated by the bus pulling away from a stop at full power shall not exceed 83 dBA. The bus-generated noise at curb idle shall not exceed 65 dBA.

**11. INTERIOR NOISE.** The combination of inner and outer panels and any material used between them shall provide sufficient sound insulation so that a sound source with a level of 80 dBA measured at the outside skin of the bus shall have a sound level of 65 dBA or less at any point inside the bus.

**12. OTHER FEATURES SPECIFIED.**

**A. Low Floor Transit:**

- Entrance ramp with additional lowering capability
- Widest entry and aisleway possible
- Chime cord at same height in lower section as upper section
- Full LED destination sign (most visible)
- Padded covering on stanchions
- Curbside wheelchair station armrest
- Voice annunciation system
- Reading lamps
- Brush finish aluminum wheels
- Ergonomic driver compartment
- Large remote controlled mirrors
- Adjustable windshield wipers

**B. High Floor Suburban:**

- Package racks
- Passenger lift
- Individually switched reading lamps
- High back reclining seats with separate headrests

Stainless steel seat backs

Fold down trays on seat backs with cup holders

110 AC accessory plugs at each seat (OPTION)

Higher horsepower rating on engine for climbing Highway 17

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Mark Dorfman, Assistant General Manager

**SUBJECT: CONSIDERATION OF QUANTITIES FOR BUS PROCUREMENT**

## I. RECOMMENDED ACTION

**Staff is recommending that the Bus Procurement proceed with the quantities as shown in the Staff Report.**

## II. SUMMARY OF ISSUES

- The Transit District has been aggressive in getting bus funding to replace its aging fleet.
- Procurement has been on hold until decisions could be reached regarding the type of bus purchased and the fuel type.
- Buses purchased for fixed-route service will be convertible diesel, with eight of them to be Alternative Fuel if the procurement can be contracted prior to June 30, 2001.
- Buses for the Highway 17 Express Service will be high-floor convertible diesel.
- A portion of the funding is future year CMAQ funds that the District is trying to move into an existing grant to save these funds for the area.
- The procurement will contain options for future year purchases that are assignable.

## III. DISCUSSION

The Transit District has been extremely successful in applying for funding to procure buses. These funds have been accumulated during a time when the District was working with its advisory groups to determine whether we would procure low-floor or high-floor buses, as well as discussing the other amenities in the buses. Also during this time period the California Air Resources Board was drafting the Urban Bus Rule, which required the District to get a waiver in order to comply with the new rule. Now that the above items are in place it is time for the District start the procurement process. Earlier on this agenda the Board was presented with the specifications for these buses. This communication will outline the quantities that the District will be able to purchase.

The funding for the bus purchases is shown in Attachment A. The District has funding in three different federal grants for the purchase of local fixed-route buses. Ten (10) low-floor 35-foot buses will be purchased from these grants for regular transit service with the remainder of the



funds used to purchase 40-foot low-floor transit buses for fixed route service. The District also has \$314,631 in Moyer money that is to be used to purchase eight (8) of the remaining buses with alternative fuel. The requirement is that these funds are required to be obligated by June 30, 2001 or they will be lost. Staff is proposing that the bid quantities be done with the Alternative Fuel as an option so that if the procurement process goes longer than June 30<sup>th</sup>, that these buses can be converted to “convertible diesel”.

In addition, last year the District received \$3,000,000 in State Transportation Congestion Relief Program (TCRP) funds for the purchase of fixed-route buses to be used in local service. These funds are 100% state with no local match required. These funds will be used to purchase as many 40-foot low-floor transit buses for fixed route service as possible. Staff is estimating that we will be able to purchase approximately nine (9) buses with these funds.

The District has programmed \$1,900,000 in Federal CMAQ funding and local funds in the amount of \$246,165, for a total of \$2,146,165 for FY 02/03. Staff has been advised by the staff of the SCCRTC that there are some projects with CMAQ funds that are not yet ready to proceed. It may be possible to advance our project that is ready to go and save the CMAQ funds for the area. We are investigating the feasibility of this approach and will allow for this contingency in the bid.

The last amount of funding is also from the State Transportation Congestion Relief Program (TCRP) for the purchase of 40-foot high-floor Highway 17 Express buses. These funds are also 100% state and will require no local match. Staff is estimating that we will be able to purchase approximately ten (10) buses.

Lastly, staff is recommending that appropriate clauses be placed in the procurement that will allow for options to cover any buses for which funding may become available in the next five years. Should the District not be able to exercise these options, the language shall be written so as to allow the District to assign the option to other transit agencies.

The Table below shows the quantities recommended by staff for purchase. The breakdown is as follows:

<b>Quantity</b>	<b>Type</b>	<b>Size</b>	<b>Fuel</b>	<b>When</b>
10	Low-Floor	35-foot	Convertible Diesel	Now
Up to 35	Low-Floor	40-foot	Convertible Diesel	Now
8 (OPTION)	Low-Floor	40-foot	CNG	Now
Up to 13	High Floor	40-foot	Convertible Diesel	Now
Up to 8 (OPTION)	Low-Floor	40-foot	CNG	Each Year
Up to 2 (OPTION)	High Floor	40-foot	CNG	Each Year

Due to the uncertainty of the price that will be bid for these buses, staff is using quantities that will allow for additional buses to be purchased. Realistically based upon the information

available at this time staff is projecting that the District will be able to purchase approximately 52 buses in this order if all funding is available and utilized.

The pricing used for estimating quantities is as follows:

<b>Type Bus</b>	<b>Estimate   Cost</b>	<b>Sales 'ax</b>	<b>Tot: l</b>
Diesel Convertible Route	\$300,000	\$23,250	\$323,250
Diesel Convertible H17	\$335,000	\$25,963	\$360,923
Alternative Fuel H17	\$355,000	\$27,513	\$382,513

#### **IV. FINANCIAL CONSIDERATIONS**

This procurement is funded through three federal grants, the State Transportation Congestion Relief Program (TCRP), State Moyer funds, and local match for the federal grants. All of the funds with the exception of the FY 02/03 Federal CMAQ funds are in existing grants, and immediately available for expenditure.

#### **V. ATTACHMENTS**

**Attachment A:** Bus Procurement Funding

**BUS PROCUREMENT FUNDING**

<b>Urban Bus Replacements</b>					
<b>fuel</b>	<b>Grant</b>	<b>Fed/State</b>	<b>SCMTD</b>	<b>Other</b>	<b>Total</b>
C-Diesel	CA-90-x873	2,000,000	500,000	-	2,500,000
C-Diesel	CA-90-x873	700,000	90,692	-	790,692
C-Diesel/CNG	CA-90-x902	3,345,473	836,368	314,631	4,496,472
C-Diesel	CA-90-y024	1,078,000	139,666	-	1,217,666
C-Diesel	CMAQ FY02FY03	1,900,000	246,165	-	2,146,165
C-Diesel	TCRP FY2001	3,000,000	-		3,000,000
C-Diesel	TCRP FY2001 - H17	3,750,000	-		3,750,000
		\$ 15,773,473	\$ 1,812,892	\$ 314,631	\$ 17,900,996

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT

**DATE:** March 16, 2001

**TO:** Board of Directors

**FROM:** Mark Dorfman, Assistant General Manager

**SUBJECT: CONSIDERATION OF AMENDING BOARD OF DIRECTOR MEETING LOCATIONS FOR 2001 BOARD MEETINGS**

## I. RECOMMENDED ACTION

**That the Board of Directors adopt the attached schedule (B) for the regular meetings for the Board of Directors for 2001.**

## II. SUMMARY OF ISSUES

- The Santa Cruz Metropolitan Transit District Bylaws set forth the Board of Directors meeting schedule in a general way stating that regular meetings shall be on the second and third Fridays of the month.
- On December 15, 2000, the Board of Directors modified the meeting location for the July, August, September and October meetings in 2001 due to anticipated construction of the Santa Cruz City Council Chambers.
- The City of Santa Cruz has notified Metro that the proposed Council Chambers construction schedule has been significantly delayed and, therefore, the Chambers will be available to Metro for all of 2001.

## III. DISCUSSION

The Santa Cruz Metropolitan Transit District Bylaws set forth the Board of Directors meeting schedule in a general way stating that the regular meetings shall be on the second and third Fridays of the month. On December 15, 2000, the Board of Directors adopted a schedule for 2001 which reflected a location change to the County Board of Supervisors Chambers for the months of July, August, September and October. The location change was necessitated by anticipated construction taking place in the Santa Cruz City Council Chambers.

The City of Santa Cruz has notified the Santa Cruz Metropolitan Transit District that the reconstruction of the City Council Chambers will take place significantly later than originally anticipated, therefore, the City has indication to SCMTD that the City Council Chambers will be available for the third Friday of each month meetings throughout 2001. Attachment B reflects the modification of the meeting locations to identify that all of the third Friday of the month meetings of the SCMTD Board of Directors shall take place at the Santa Cruz City Council Chambers.

Staff recommends that the Board of Directors adopt Attachment B as the schedule for dates and locations for meetings to be held in 2001.

#### **IV. FINANCIAL CONSIDERATIONS**

Local jurisdictions whose facilities are used by Metro for meeting purposes do not charge fees.

#### **V. ATTACHMENTS**

**Attachment A:** Santa Cruz Metropolitan Transit District Board of Directors Meetings 2001 adopted December 15, 2000.

**Attachment B:** Recommended Santa Cruz Metropolitan Transit District Board of Directors Meetings 2001 revised.

**SANTA CRUZ METROPOLITAN TRANSIT DISTRICT  
BOARD OF DIRECTORS MEETINGS  
2001**

January Meetings

- January 12, 2001 - SCMTD Administrative Offices
- January 19, 2001 - Santa Cruz City Council Chambers

February Meetings

- February 9, 2001 - SCMTD Administrative Offices
- February 16, 2001- Santa Cruz City Council Chambers

March Meetings

- March 9, 2001 - SCMTD Administrative Offices
- March 16, 2001 - Santa Cruz City Council Chambers

April Meetings

- April 13, 2001 - SCMTD Administrative Offices
- April 20, 2001 - Santa Cruz City Council Chambers

May Meetings

- May 11, 2001 - SCMTD Administrative Offices
- May 18, 2001- Santa Cruz City Council Chambers

June Meetings

- June 8, 2001 - SCMTD Administrative Offices
- June 15, 2001 - Santa Cruz City Council Chambers

July Meetings

- July 13, 2001 - SCMTD Administrative Offices
- July 20, 2001- **Board of Supervisor Chambers**

August Meetings

- August 10, 2001 - SCMTD Administrative Offices
- August 17, 2001- **Board of Supervisor Chambers**

September Meetings

- September 14, 2001 - SCMTD Administrative Offices
- September 21, 2001 - **Board of Supervisor Chambers**

October Meetings

- October 12, 2001 - SCMTD Administrative Offices
- October 19, 2001- **Board of Supervisor Chambers**

November Meetings

- November 9, 2001 - SCMTD Administrative Offices
- November 16, 2001- Santa Cruz City Council Chambers

December Meetings

- December 14, 2001 - SCMTD Administrative Offices
- December 21, 2001 - Santa Cruz City Council Chambers

**NOTE: ALL MEETINGS BEGIN AT 8:30 A.M.**

# SANTA CRUZ METROPOLITAN TRANSIT DISTRICT BOARD OF DIRECTORS MEETINGS 2001

## January Meetings

- January 12, 2001 - SCMTD Administrative Offices
- January 19, 2001- Santa Cruz City Council Chambers

## February Meetings

- February 9, 2001 - SCMTD Administrative Offices
- February 16, 2001- Santa Cruz City Council Chambers

## March Meetings

- March 9, 2001 - SCMTD Administrative Offices
- March 16, 2001 - Santa Cruz City Council Chambers

## April Meetings

- April 13, 2001 - SCMTD Administrative Offices
- April 20, 2001 - Santa Cruz City Council Chambers

## May Meetings

- May 11, 2001 - SCMTD Administrative Offices
- May 18, 2001- Santa Cruz City Council Chambers

## June Meetings

- June 8, 2001 - SCMTD Administrative Offices
- June 15, 2001- Santa Cruz City Council Chambers

## July Meetings

- July 13, 2001 - SCMTD Administrative Offices
- July 20, 2001 - Santa Cruz City Council Chambers

## August Meetings

- August 10, 2001 - SCMTD Administrative Offices
- August 17, 2001- Santa Cruz City Council Chambers

## September Meetings

- September 14, 2001 - SCMTD Administrative Offices
- September 21, 2001- Santa Cruz City Council Chambers

## October Meetings

- October 12, 2001 - SCMTD Administrative Offices
- October 19, 2001- Santa Cruz City Council Chambers

## November Meetings

- November 9, 2001 - SCMTD Administrative Offices
- November 16, 2001 - Santa Cruz City Council Chambers

## December Meetings

- December 14, 2001 - SCMTD Administrative Offices
- December 21, 2001 - Santa Cruz City Council Chambers

NOTE: ALL MEETINGS BEGIN AT **8:30 A.M.**