

**To:** Marketing, Planning, & Legislative Committee

**Date:** 04/26/2022

**From:** Melody Reeb, Director of Planning, Marketing, & Innovation

**Reviewed by:** *Ref*

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**SUBJECT: FY 2022-23 Short Range Transit Plan Guidelines**

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### **Background:**

The Short Range Transit Plan (SRTP) is County Connection's operations and financial planning document. In order to effectively execute planning and programming responsibilities, the Metropolitan Transportation Commission (MTC) requires each transit operator receiving federal funding through the Regional Transportation Improvement Program (TIP) to prepare, adopt, and submit an SRTP to MTC every four years in order to remain eligible to receive federal funding. County Connection's last SRTP was completed in 2016. In early 2020, staff was in the process of updating the plan, which was then put on hold due to COVID-19.

### **Revised Approach:**

The pandemic has significantly impacted transit operations, ridership, and revenues. The decrease in ridership, changes in travel patterns, and revenue uncertainties have created enormous planning and operational challenges for all Bay Area transit operators. While federal relief funds provided a significant stop gap, it is anticipated that these funds will be exhausted within the next two fiscal years for most transit operators. In light of the current crisis, MTC has restructured and adopted new guidelines for the FY 2022-23 SRTP to help plan for and navigate through the continued uncertainties.

The revised guidelines narrow the scope to a five-year planning horizon with a focus on financial and service planning. Central to the revised approach will be scenario planning to develop an understanding of how service plans might be adapted under different revenue constraints. Staff will be making service level projections based on three scenarios that have been defined by MTC, which assume varying levels of ridership and revenue recovery. Staff also plans to conduct a survey to better understand the community's needs and post-pandemic travel patterns and to help inform the scenario planning process.

A draft SRTP is due to MTC by September 30, 2022, and the final version must be adopted by the Board and submitted to MTC by December 29, 2022. Staff plans to provide an update to the MP&L Committee as the scenarios are developed this Summer before presenting the draft in September.

### **Financial Implications:**

MTC will be providing \$20,000 in funding to County Connection to support the development of the SRTP. This has been included in the draft FY 2023 service development budget.

### **Recommendation:**

None, for information only.

**Action Requested:**

None, for information only.

**Attachments:**

Attachment 1: Short Range Transit Plan Guidelines

# Attachment 1

Date: March 23, 2022  
W.I.: 1517  
Referred by: PAC

Attachment A  
Resolution No. 4512  
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## **Short Range Transit Plan (SRTP): Bay Area Transit Recovery Scenario Planning Guidelines**

### **1. BASIS OF THE SRTP REQUIREMENT**

Federal statutes require that the Metropolitan Transportation Commission (MTC), in partnership with the state and with local agencies, develop and periodically update a long-range Regional Transportation Plan (RTP), and a Transportation Improvement Program (TIP) which implements the RTP by programming federal funds to transportation projects contained in the RTP. To effectively execute these planning and fund programming responsibilities, MTC, in cooperation with Region IX of the Federal Transit Administration (FTA), requires each transit operator receiving federal funding through the TIP (federal grantees within the MTC region) to prepare, adopt, and submit an SRTP to MTC. Transit operators are required by MTC to prepare an SRTP every four years in order to remain eligible to receive federal funding.

### **2. REIMAGINED APPROACH**

The COVID-19 pandemic has significantly impacted transit operations, ridership, and revenues. The decrease in ridership, changes in travel patterns and uncertainties in farebox revenues have created enormous planning and operational challenges for Bay Area transit operators. While federal relief funds provided a significant stop gap, it is anticipated that these funds will be exhausted within the next two fiscal years for most transit operators. In light of the current crisis, the SRTP is being reimagined and restructured for FY 2022-23 to help plan for and navigate through the continued uncertainties.

The revised approach narrows the scope to a five-year planning horizon with a focus on financial and service planning. In another departure from past practice, all transit operators will be required to prepare an SRTP in this cycle to facilitate a regional understanding of transit priorities and plans over the next five years. This revised approach will also include scenario planning, which asks operators to consider how service plans might be adapted under different revenue scenarios. This reduction in the scale of the deliverables is intended to facilitate the development of a more narrowly focused SRTP for this planning cycle on a much shorter timeline than has been required for traditional SRTPs.

### **3. SRTP PURPOSE**

- A. To serve as a management and policy document for the transit operator, as well as a means of providing FTA and MTC with information necessary to meet regional fund programming and planning requirements.

- B. To understand the status and outlook of transit service in the Bay Area, both by operator and regionally
- C. To understand the impacts of varying levels of funding on transit service
- D. To develop actionable information to support funding advocacy, including the ability to articulate service benefits and tradeoffs at different funding levels

#### 4. SCENARIO PLANNING

Core to this revised SRTP approach is developing an understanding of how service plans might be adapted under different revenue constraints. Accordingly, this SRTP asks operators to consider and make projections of service levels under three scenarios:

1. **Robust Recovery:** There is adequate funding to return overall revenue to 100% of pre-pandemic levels, with escalation. This would not assume proportionate recovery across all revenue sources.
2. **Revenue Recovery, with Fewer Riders:** Federal relief funds are eventually exhausted, although other funds recover to pre-pandemic levels. However, farebox revenue remains stagnant (20-50% below pre-pandemic levels, depending on current status) for the next five years.
3. **Some Progress:** Federal relief funds are eventually exhausted and total revenue available to the agency is 15% below pre-pandemic levels for the next five years.

#### 5. SCOPE

The deliverables include data on service and operating projections and a brief supporting narrative document to describe pre-pandemic service, changes made since the pandemic, and priorities and plans in the next five years. A data response template and specific revenue forecasts for each operator and for each scenario will be distributed directly to operators.

##### A. Data Request

Complete the data template which requests the following categories of data:

- Revenue Vehicle Hours
- Revenue Vehicle Miles
- Number of Routes Operated
- Total Route Miles
- Ridership
- Total Operating Budget
- Total Revenue Vehicles
- Vehicles Required for Maximum Service
- Employees

##### Criteria

- Data should be separated by mutually exclusive and comprehensively exhaustive modes (no overlap between modes and sums to operator totals)

- Data should be completed for FY19 (pre-pandemic), FY23 (since the pandemic), and for FY24-28 for each of the three revenue scenarios
- Data should be provided in whole numbers and dollars
- The Excel document should be completed as provided. Fields may be left blank if not applicable, but the document, fields, rows, and columns should not be altered

## **B. Narrative**

The supporting narrative document is an opportunity to expand upon and contextualize the responses to the data request. It should briefly describe pre-pandemic service, discuss service and operations changes since the pandemic, and elaborate on the considerations that drive the service projections made in the data request. The document should be structured as follows:

### **1. Pre-pandemic State of Service – FY 2018-19**

- What did operations look like before the pandemic?
- How much service was available?
- Where, when, and how was service deployed?
- What did ridership levels and travel patterns look like?

### **2. Current State of Service – FY 2022-23**

- How have service and operations changed since the pandemic?
- What were the priorities, goals and processes that informed decisions to adjust service or for budgeting decisions in FY23?
- How much service is available now?
- How has the distribution of service changed by geography? Time of day? Mode?
- Describe changes to ridership and travel patterns since the start of the pandemic.
- How have equity priority communities been considered in service planning or changes?
- How has the operating budget changed?

### **3. Scenario Planning Concepts – FY 2023-24 through FY 2027-28**

For each of the three scenarios, questions to consider include:

- How would priorities and goals change with revenue constraints? What would inform or trigger service change decisions?
- How much service would be available?
- How would the deployment of service change by mode? Geography or route? Time of day or week?
- How would equity priority communities be considered under each scenario?
- How would these revenue constraints impact staffing and budgeting?
- How would different service levels impact fleet requirements or spare ratios?

## **6. FUNDING**

MTC has budgeted approximately \$640,000 to support SRTP development. The seven largest operators will receive \$40,000 each, and medium and small operators will receive \$20,000 each. If operators or county transportation authorities elect to submit a combined SRTP, the funding for which each operator is eligible will be pooled at the county level. Submissions from combined SRTPs must still include data responses and narratives for each participating operator.

## **7. TIMELINE**

1. Draft SRTP: September 30, 2022
2. Final SRTP: December 29, 2022

This schedule reflects the urgency established by the rapid exhaustion of federal relief funds, as well as the opportunity to articulate regional transit funding needs in advance of the FY2023-24 state legislative agenda.

Both drafts and final versions should be submitted to MTC staff electronically [srtp@bayareametro.gov](mailto:srtp@bayareametro.gov). The narrative may be provided in PDF format, but the data request should be in MS Excel format.

## **8. REQUIRED APPROVALS**

The operator's governing body must adopt the SRTP.

## **9. MINOR REVISIONS TO THESE GUIDELINES**

Modifications to these guidelines may be approved by the Programming and Allocations Committee.