C I T Y O F M O R R O B A Y
PUBLIC WORKS ADVISORY BOARD
A G E N D A

The City of Morro Bay is dedicated to the preservation and enhancement of the quality of life. The City shall be committed to this purpose and will provide a level of municipal service and safety consistent with and responsive to the needs of the public.

Thursday, November 4, 2013
Veteran's Memorial Building - 6:00 P.M.
209 Surf Street, Morro Bay, CA

Matt Makowetski, Chair

Ron Burkhart
Janith Goldman
Marlys McPherson
Deborah Owen
Richard Rutherford
Stephen Shively

ESTABLISH QUORUM AND CALL TO ORDER
MOMENT OF SILENCE / PLEDGE OF ALLEGIANCE
ANNOUNCEMENTS / PRESENTATIONS

PUBLIC COMMENT PERIOD
Members of the audience wishing to address the Board on City business matters other than scheduled items may do so at this time. To increase the effectiveness of the Public Comment Period, the following rules shall be followed:

- When recognized by the Chair, please come forward to the podium and state your name and address for the record. Board meetings are audio and video recorded and this information is voluntary and desired for the preparation of minutes.
- Comments are to be limited to three minutes.
- All remarks shall be addressed to the Board, as a whole, and not to any individual member thereof.
- The Board respectfully requests that you refrain from making slanderous, profane or personal remarks against any elected official, commission and/or staff.
- Please refrain from public displays or outbursts such as unsolicited applause, comments or cheering.
- Any disruptive activities that substantially interfere with the ability of the Board to carry out its meeting will not be permitted and offenders will be requested to leave the meeting.
- Your participation in Board meetings is welcome and your courtesy will be appreciated.

In compliance with the Americans with Disabilities Act, if you need special assistance to participate in this meeting, please contact the Public Services' Administrative Technician at (805) 772-6291. Notification 24 hours prior to the meeting will enable the City to make reasonable arrangements to ensure accessibility to this meeting.

A. CONSENT CALENDAR

A-1 Approval of Minutes of August 29, 2013 Joint Meeting with Recreation & Parks
Recommendation: Approve minutes.

A-2 Approval of Minutes of August 29, 2013
Recommendation: Approve minutes.

A-3 Approval of Minutes of September 5, 2013
Recommendation: Approve minutes.

A-4 Approval of Minutes of October 1, 2013
Recommendation: Approve minutes.

A-5 Report on North Coast Transit Surveys 2013 Project
Recommendation: Receive the draft North Coast Transit Surveys 2013 Technical Memorandums 1 and 2 on Existing Conditions and Survey Results, and provide written comments to Staff as necessary by November 7, 2013.

A-6 Director's Report/Information Items
Recommendation: Receive and file.

B. OLD BUSINESS - None

C. NEW BUSINESS

C-1 Morro Bay Transit Options for Weekend Service
Recommendation: Consider options, and recommend the City Council expand Morro Bay Transit service on Saturday as outlined in the Staff Report commencing July 1, 2014.

C-2 Public Draft Options Report for the NEW Water Reclamation Facility
Recommendation: Receive Report, take public testimony, and forward any recommendations to the City Council.

C-3 Review of San Jacinto Street Parking and Striping
Recommendation: Receive the options, take public testimony, and provide any recommendations or comments to Staff.

C-4 Formation of a PWAB Subcommittee for the preparation of a Request for Proposals and assistance in the selection of a Water and Sewer Rate Consultant
Recommendation: Select two members to serve on the sub committee.

D. FUTURE AGENDA ITEMS

E. ADJOURNMENT
Adjourn to the Public Works Advisory Board meeting at the Veteran's Memorial Building, 209 Surf Street, on **Thursday, December 19, 2013 at 6:00 p.m.**

This agenda is subject to amendment up to 72 hours prior to the date and time set for the meeting. Please refer to the agenda posted at the Public Services Department, 955 Shasta Avenue, for any revisions or call the department at 772-6291 for further information.

Materials related to an item on this Agenda are available for public inspection during normal business hours in the Public Services Department, at Mill's/ASAP, 495 Morro Bay Boulevard, or the Morro Bay Library, 695 Harbor, Morro Bay, CA 93442, or online at www.morro-bay.ca.us/pwab . Materials related to an item on this Agenda submitted to the Board after publication of the Agenda packet are available for inspection at the Public Services Department during normal business hours or at the scheduled meeting.

This Agenda is available for copying at Mills Copy Center and at the Public Library

AGENDA ITEM:	A-1
DATE:	November 4, 2013
ACTION:	

SYNOPSIS MINUTES – MORRO BAY PUBLIC WORKS ADVISORY BOARD AND RECREATION AND PARKS COMMISSION
JOINT MEETING – AUGUST 29, 2013
VETERAN'S HALL – 6:00 PM

Chairperson Makowetski called the meeting to order at 6:00 PM

PRESENT:	Matt Makowetski	Chairperson
	Ron Burkhart	Vice-Chairperson
	Janith Goldman	Board Member
	Deborah Owen	Board Member
	Richard Rutherford	Board Member
	Stephen Shively	Board Member
ABSENT:	Marlys McPherson	Board Member
PRESENT:	John Bates	Chairperson
	Drew Sidaris	Vice-Chairperson
	Alfonso Romero	Commissioner
	Robert Swain	Commissioner
ABSENT:	Karen Croley	Commissioner
	Tom Coxwell	Commissioner
	Brian Dorfman	Commissioner
STAFF:	Rob Livick	Public Services Director
	Joe Woods	Recreation and Parks Director
	Rick Sauerwein	Capital Projects Manager

ESTABLISH QUORUM AND CALL TO ORDER
MOMENT OF SILENCE / PLEDGE OF ALLEGIANCE
ANNOUNCEMENTS/PRESENTATIONS

PUBLIC COMMENT

Chairperson Makowetski opened Public Comment period.

Rigmor Samuelsen, Morro Bay resident, expressed concern that the proposed sign ordinance may be too restrictive and that it may discourage creative signs from being installed in the City.

Livick informed Samuelsen that the subject of the sign ordinance update will be discussed at the September 4, 2013 Planning Commission meeting.

Chairperson Makowetski closed Public Comment period.

I. JOINT MEETING DISCUSSION ITEMS

A. Discussion and Recommendations for future Citywide Directional/Way-finding Signage (Woods)

Woods presented the staff report.

Woods lead a discussion with both advisory groups on citywide direction/way-finding signage, as directed by City Council. Woods described the five types of signs currently used throughout the City: Way-Finding, City Entrance Signage, General Directional Signs, Street Banners and City Park Banner.

Woods gave the following details on the various citywide signs. The way-finding signs are located at both the south and north gateways to Morro Bay and target large points of interest using single graphic directions. The design of these signs was brought forward by Public Works in 2007. The branding of this sign is working well throughout the City where the design has been incorporated into several park signs. The City currently has two entrance signs that contain an area to insert event information as well as directional information to the Visitors Center. The events listed on these signs are typically free and open to the public.

Woods reported that the City has a wide variety of directional signs that provide information to both vehicular and pedestrian traffic. He noted the signs are not standard in size, color or content and the advisory board and commission may want to consider developing a uniform program, possibly tailored after the current way-finding signs or maybe something new.

Woods reported that the City has street banners located along the Embarcadero, Morro Bay Boulevard and Main Street. These banners are currently changed several times per year by City staff. The banners are general welcome signs with some specific to events. The inventory of these signs could be extended as well as opened up for sponsor advertisement. Woods noted that staff could develop a policy for the street banners at the direction of the advisory board and commission.

Woods reported the final type of signs used in the City which are the City Park Banners. There are two poles used to display the banners at the park, but staff is working on replacing the poles with a more efficient method of hanging the banners. Currently, there are two banners on display across the poles. Staff is looking for direction on how best to display these banners including the best location and whether or not to display two banners at a time and whether or not a fee should be assessed for displaying the banners.

Woods concluded that citywide signage is very important in any location whether they provide direction to a point of interest or service. Having those signs consistent throughout our town makes it easier for visitors to travel through our town, find the services and attractions they're looking for, thereby enhancing their visit.

WAY-FINDING SIGNS DISCUSSION POINTS:

- In favor of using the way-finding signs
- Important to maintain the signs
- Would like a consistent look to the signs, using the Rock/sailboat logo
- Felt signs appeared unfinished, recommended painting the supports

- Way-finding sign at Mobil station needs clarification

Livick noted that as a condition of their re-development, the Mobile station was required to provide a kiosk displaying visitor information and that the sign at the round-about is meant to direct visitors into the Mobile station.

CITY ENTRANCE SIGNAGE DISCUSSION POINTS:

- In favor of listing events on these signs
- Would like to see consistent lettering and color
- Would like to have signs consistent in style and design with other City signs
- Would like to see an entrance sign near the roundabout
- Some concerns about safety at the roundabout if there are too many signs

GENERAL DIRECTIONAL SIGNS DISCUSSION POINTS:

- Would like to see a consistent design and color on these signs
- Prefer the Rock/sailboat logo
- Would like to signs kept simple with basic general directions
- Replace "Old Town" with "Downtown"
- Replace signs as needed, not necessary to have a mass replacement
- Include mileage to destination point
- Would like to use "Embarcadero" instead of "Waterfront"
- Sign at South Bay Blvd too small

STREET BANNERS DISCUSSION POINTS:

- In favor of using street banners
- Would like to see a wider variety and possibly changed more often
- Not in favor of including sponsor names on street banners
- Would like some limits on the number of banners allowed; concerned about having too many signs
- Supportive of charging a fee to recoup staffing costs for hanging the banners

Livick noted that the City's current commercial signage code does not allow for brand names on signage and street banners would have to comply with current codes. He further noted that the Planning Commission is currently looking at changing the sign code to allow a certain percentage of a sign to be used for brand names, so change is possible if it makes it through Planning Commission, City Council, and the Coastal Commission.

CITY PARK BANNER DISCUSSION POINTS:

- Some members felt two banner hung together was too much, others felt it was okay but the banners should be smaller and have more space between them
- Supportive of charging a fee to recoup staffing costs for hanging and removing the banners
- City Park a good location for the banners; possibly develop a second location
- Would like to see a more permanent means of hanging the banners; possibly something more decorative

B. Discussion and Recommendations for Three Proposed Concept Plans for Improvements to Centennial Staircase (Livick)

Livick presented the staff report.

Commissioner Swain asked staff to compare maintenance costs for the elevator alternative versus the funicular alternative. Livick stated the funicular option would likely cost more to maintain because it has more moving parts.

Commissioner Swain asked staff about the possibility of charging the public to ride the funicular in order to recover some of the costs for construction and maintenance. Livick stated it may be a possibility.

Commissioner Bates expressed support for the tower alternative.

Commissioner Romero asked if the project site is owned by the City or by a private owner. Livick stated the right of way that extends from Morro Bay Boulevard is owned by the City, and that area is where the majority of the facility would be located. Livick stated the property at 781 Market is owned by a private property owner, but the City currently owns all of the property necessary to move forward with the project.

Commissioner Sidaris expressed concern that a funicular would be too expensive to install, and instead expressed support for the elevator alternative.

Boardmember Shively asked staff to confirm that ADA access will be provided to the lower level of the existing restaurant. Livick stated that in order to make effective use of the second floor, the City will require ADA access to that area. Shively also expressed concern about the maintenance issues associated with a glass elevator and a funicular, especially when the City is already short-staffed.

Boardmember Burkhart stated maintenance will be an issue for any feature selected, but the elevator would be the most financially feasible alternative. He stated the City needs to consider the sea air and its impacts when selecting an alternative.

Boardmember Goldman asked staff to clarify the owner's intention regarding whether the owner believes he should only bear the cost that is equal to the amount of property that he was given. Livick stated the City is obligated to afford the owner some proportionality to the value of the cost of the property in the agreement. He also stated the agreement did not indicate which device would be installed at the park. Goldman asked staff who would be responsible for any additional fees that would be incurred during the process. She expressed support for the elevator alternative.

Boardmember Owen stated the tower would be an unnecessary feature as the views from Market Street are already notable. She also stated the distance from the Embarcadero to Market Street is too short to install a funicular. Owen expressed support for the elevator alternative.

Chairperson Makowetski expressed support for the tower alternative as long as it could be incorporated with the elevator. He stated he would like to see stairs incorporated into the design as well.

Chairperson Makowetski opened Public Comment period, and seeing none, closed Public Comment period.

PUBLIC WORKS ADVISORY BOARD MOTION: Boardmember Burkhart moved to approve Alternate 3 with the elevator, staircase, and tower.

The motion was seconded by Boardmember Goldman and the motion passed (3-2), with Boardmembers Shively and Rutherford dissenting. According to Burkhart, Makowetski should not vote because the Chairperson is not allowed to create a tie – he is to remain neutral. Based on comments from Burkhart, Makowetski withdrew his vote.

RECREATION AND PARKS COMMISSION MOTION: Commissioner Sidaris moved to approve Alternate 2 with the elevator and no staircase.

The motion was seconded by Commissioner Romero.

Commissioner Swain expressed support for the alternative *with* a staircase so that people would still be able to access Market Street from the Embarcadero if the elevator is ever out of service. Commissioner Bates responded to Swain's comment and noted the project area is small and may not be able to accommodate both an elevator and a staircase.

Based on the comments from Swain, the Commission decided to amend the motion.

RECREATION AND PARKS COMMISSION AMENDED MOTION: Commissioner Sidaris moved to approve Alternate 3 with the elevator and staircase.

The motion was seconded by Commissioner Swain and the motion passed (2-1), with Commissioner Romero dissenting.

ADJOURNMENT
The meeting adjourned at 7:48 PM to the next scheduled meeting to be held at the Veteran's Memorial Hall on Thursday, September 5, 2013, at 6:00 PM.

AGENDA ITEM:	A-2
DATE:	November 4, 2013
ACTION:	

SYNOPSIS MINUTES - MORRO BAY PUBLIC WORKS ADVISORY BOARD
REGULAR MEETING – AUGUST 29, 2013
VETERAN'S HALL – 6:00 P.M.

Chairperson Makowetski called the meeting to order at 6:00 p.m.

PRESENT:	Matt Makowetski	Chairperson
	Ron Burkhart	Vice-Chairperson
	Janith Goldman	Board Member
	Deborah Owen	Board Member
	Richard Rutherford	Board Member
	Stephen Shively	Board Member
ABSENT:	Marlys McPherson	Board Member
STAFF:	Rob Livick	Public Services Director
	Rick Sauerwein	Capital Projects Manager

ESTABLISH QUORUM AND CALL TO ORDER
MOMENT OF SILENCE / PLEDGE OF ALLEGIANCE
ANNOUNCEMENTS/PRESENTATIONS

Barbara Doerr, Morro Bay resident, expressed concern that the Chairpersons of the PWAB and Recreation and Parks Commission did not vote on Item I.B at the joint meeting to break the tie. She stated it is the responsibility of each boardmember to provide their opinion to the public.

Chairperson Makowetski asked about the status of the Seashell Estates Project. Livick stated the 10 lot subdivision was approved several years ago, and being constructed now are the public improvements including utilities, paving, pedestrian pathways, and a stormwater facility.

CONSENT CALENDAR

A-1 Approval of Minutes from June 20, 2013
Recommendation: Approve minutes.

MOTION: Boardmember Shively moved to approve the June 20, 2013 minutes.

The motion was seconded by Boardmember Burkhart and carried unanimously. (6-0).

OLD BUSINESS

B-1 Presentation on the Status of the Pavement Management Plan and 2013 Paving Program
Recommendation: For information only, no action required.

Sauerwein presented the item. He stated Council approved $757,557 from the "Measure Q" funds for the Pavement Maintenance program, and staff has "set aside" $150,000 for day-to-day maintenance activities. Design of the 2013 Pavement Rehabilitation Project is underway and expected to be completed this month. Staff has hired Roads Scouts to assess current road conditions and develop contract specifications. Invitations to Bid will be issued in September, and an October 2013 award is anticipated. Staff will transition to new pavement management software called Street Saver before the end of this calendar year, and then FY 2014-2018 pavement management priorities will be re-evaluated based on current roadway conditions and application of new pavement rehabilitation strategies, such as the triple layer cape seal process. A visual survey has been conducted on 94 city streets and 18 specific pavement defects to arrive at a design list that includes 33 street segments.

Chairperson Makowetski asked staff which entity is responsible for maintaining the road under Highway 1, near Quintana and South Bay Boulevard. Livick confirmed that section of road is in the Caltrans right of way, but it is the City's responsibility to maintain.

Boardmember Rutherford asked about the condition of Quintana Road where it intersects with South Bay Boulevard. He stated there should be two left turn lanes installed at that intersection in order to avoid any potential accidents. Livick stated the City will continue to look at this intersection, but according to the City's last study of this intersection, traffic volumes do not warrant such a level of improvement, nor are there enough accidents at that location to warrant an acquisition of right of way.

Boardmember Shively confirmed with staff the cape seal has chips in it.

Boardmember Shively acknowledged the fact that there have been several concerns from the public regarding road conditions in north Morro Bay, and he noted most of the improvements are occurring in that area.

Livick stated the 2013 Paving Program incorporates the pavement techniques that the City has learned about in the past few years, such as the three layer cape seal technique.

Boardmember Shively stated the chips in the cape seal do improve the structural section of the road. Sauerwein stated the triple layer provides a leveling course, as well, to help take care of some of the inconsistencies in the road's surface.

Boardmember Shively confirmed with staff that cape seal is temperature-dependent in dig-out areas.

NEW BUSINESS

None.

FUTURE AGENDA ITEMS

Staff anticipates the following items coming to the Board in the upcoming months:

- Morro Creek Bridge and Path (Special Meeting September 5, 2013)
- NEW Water Reclamation Facility (October)

ADJOURNMENT

The meeting adjourned at 7:30 pm to the next scheduled meeting to be held at the Veteran's Memorial Hall on Thursday, September 5, 2013, at 4:00 pm.

AGENDA ITEM: A-3

DATE: November 4, 2013

ACTION: _____

SYNOPSIS MINUTES - MORRO BAY PUBLIC WORKS ADVISORY BOARD
SPECIAL MEETING – SEPTEMBER 5, 2013
VETERAN'S HALL – 4:00 P.M.

Chairperson Makowetski called the meeting to order at 6:00 p.m.

PRESENT:	Matt Makowetski	Chairperson
	Ron Burkhart	Vice-Chairperson
	Janith Goldman	Board Member
	Deborah Owen	Board Member
	Richard Rutherford	Board Member
	Stephen Shively	Board Member
ABSENT:	Marlys McPherson	Board Member
STAFF:	Rick Sauerwein	Capital Projects Manager
	Barry Rands	Associate Engineer
	Mike Sherrod	RRM Design Group Representative

ESTABLISH QUORUM AND CALL TO ORDER
MOMENT OF SILENCE/PLEDGE OF ALLEGIANCE
ANNOUNCEMENTS/PRESENTATIONS

CONSENT CALENDAR

None.

OLD BUSINESS

None.

NEW BUSINESS

C-1 Morro Creek Multi-Use Trail and Bridge Project: Presentation of Design and Budget Alternatives
Recommendation: Receive presentation of bridge and trail design options and budgets, take public testimony and provide recommendations to Staff.

Rands and Sherrod presented the staff report.

Chairperson Makowetski opened Public Comment period.

Robert Davis, resident of Morro Bay, expressed support for the project. He stated he would like to see a complete project that connects to the existing harbor walk.

Geiska Velasquez, North Coast Regional Planner/Scenic Byway Coordinator for SLOCOG and resident of Morro Bay, explained the development for this project is funded through a Scenic Byway grant which means this project was considered significant enough for the Federal Highway Administration to fund. Because the project is located in a scenic corridor, the Board should keep in mind that the Coastal Commission will consider visual impacts when reviewing the project. Additionally, the construction funding that is set aside for the project so far is through an enhancement grant, so anything that is considered vehicular will not be covered through the grant.

Jack Robinson, resident of Morro Bay, stated more trikes have been used in recent years, and they require the same width as surreys. This fact could be incorporated as part of the rationale for the proposed width of the bike path.

Michael Lucas, Morro Bay Planning Commissioner and resident of Morro Bay, expressed support for the project and asked staff to consider the following issues:

1. The nature of the project over time. He asked staff to consider which of the three alternatives has an associated maintenance or funding program.
2. The impact of heavy weight vehicles. He noted this type of vehicle may affect the City's insurance costs.

Chairperson Makowetski closed Public Comment period.

Boardmember Burkhart asked Sherrod to show the photographic slides for Alternatives 1 and 2 in order to compare their visual impacts. After reviewing the photos for both alternatives, Burkhart stated Alternative 2 looks lighter and less dense than Alternative 1. Sherrod clarified the relative visual impacts are evaluated based on the height of the structure. He stated Alternative 2 is about 5.5 feet taller than Alternative 1, so from a coastal planning perspective, Alternative 2 would have a greater visual impact.

Boardmember Owen asked Sherrod to discuss the load capacity of Alternative 1. Sherrod explained all three alternatives are designed for light vehicles, pedestrians, and bikes. All three, however, could be designed to carry heavier vehicles, but the bridges would need to be widened in order to accommodate them.

Sherrod clarified with the Board that he is only providing the information to the Board and staff so that they can deliberate and select the most appropriate alternative.

Boardmember Shively asked the following questions:

1. He asked if the bridge will be constructed in place or if it will be a pre-fabricated structure. Sherrod confirmed the bridge will be a pre-engineered and pre-fabricated super-structure. Additionally, Sherrod stated the consultant is hoping to stay out of the floodway during installation.
2. Shively asked Sharrod to compare the maintenance costs for each alternative. Sherrod stated such costs have not yet been evaluated in detail.
3. Shively expressed concern about keeping the bridge free of birds, and he suggested designing it so that birds are discourages from perching on the structure.

Boardmember Shively stated he favors Alternative 1 because it is at human level which would deter birds from perching and because it is the least costly option.

Chairperson Makowetski asked the following questions:

1. He asked Sherrod to explain if there any advantages of having a larger bridge, aside from that fact that it would allow emergency vehicles. Sherrod explained structures designed for heavier loading can allow for larger emergency vehicles than the standard loading, but the 12 foot wide standard load does meet the requirements for most cases.
2. He asked Sherrod to discuss the likelihood of the Coastal Commission approving a tall bridge. Sherrod stated he met with a Coastal Commission Planner who explained there are varying degrees of difficulty to make findings to approve the bridge as height increases because the impact to coastal resource becomes greater. It is possible to approve such a project, however, by mitigating visual impacts.

Boardmember Shively asked staff if there has been a demonstrated need for heavy vehicles across the project area. Sauerwein stated the issue is being discussed with other City staff.

Boardmember Shively expressed support for Alternative 1 because it would require the least amount of maintenance. He also stated he supports the standard loading option unless there is a driving need for the heavy loading option.

Boardmember Goldman expressed support for Alternative 1 because it is less obtrusive.

Boardmember Owen expressed support for Alternative 1 because it incorporates aesthetically pleasing landscaping and requires little maintenance. She asked staff if the bridge will have any lighting at night. Sauerwein explained lighting is a serious concern for the Coastal Commission and there are several limitations on the type of lighting that can be installed. The additional costs have not been factored into the project.

Boardmember Burkhart expressed support for Alternative 2. He asked Sherrod, however, if Alternative 1 will be as heavy as it appears when it is built. Sherrod stated the look of the structure can be lightened by adjusting the gauges of the pickets on the bridge.

Boardmember Shively stated viewshed issues may not be a large concern because the bridge will likely be hidden from view unless someone is at the bridge location or at the beach (due to vegetation).

Chairperson Makowetski expressed support for Alternative 1 because of its minimalist design, its low cost, its lower visual impacts, and because it structurally relates to the bridge near Lila Kiser Park. Makowetski asked Sherrod if any public seating will be provided near the bridge entrances. Sherrod stated the consultant will examine opportunities for public seating in several locations near the bridge.

MOTION: Boardmember Shively moved to approve Alternative 1 with the light loading option, and if it can be incorporated, pickets at a lower gauge so that visibility is improved for younger children.

The motion was seconded by Boardmember Burkhart and carried unanimously. (6-0).

Sauerwein announced there will be a special PWAB meeting on September 26, 2013.

FUTURE AGENDA ITEMS

Staff anticipates the following items coming to the Board in the upcoming months:

- NEW Water Reclamation Facility (October)
- Transit Service Options for Weekend Service (October)

ADJOURNMENT

The meeting adjourned at 6:59 pm to the next scheduled meeting to be held at the Veteran's Memorial Hall on Thursday, October 1, 2013, at 5:00 pm.

AGENDA ITEM:	A-4
DATE:	November 4, 2013
ACTION:	

SYNOPSIS MINUTES - MORRO BAY PUBLIC WORKS ADVISORY BOARD
SPECIAL MEETING – OCTOBER 1, 2013
VETERAN'S HALL – 5:00 P.M.

Chairperson Makowetski called the meeting to order at 6:00 p.m.

PRESENT:	Matt Makowetski	Chairperson
	Ron Burkhart	Vice-Chairperson
	Janith Goldman	Board Member
	Marlys McPherson	Board Member
	Deborah Owen	Board Member
	Richard Rutherford	Board Member
	Stephen Shively	Board Member
STAFF:	Rob Livick	Public Services Director
	Rick Sauerwein	Capital Projects Manager
	Barry Rands	Associate Engineer
	Mike Sherrod	RRM Design Group Representative

ESTABLISH QUORUM AND CALL TO ORDER
MOMENT OF SILENCE/PLEDGE OF ALLEGIANCE
ANNOUNCEMENTS/PRESENTATIONS

CONSENT CALENDAR

None.

OLD BUSINESS

B-1 Morro Creek Multi-Use Trail and Bridge Project: Presentation of 30% Design
Recommendation: Receive presentation of bridge and trail design at the 30% level, take public testimony and provide comments as necessary.

Rands introduced the project.

Livick expressed the concerns of Fire Chief Steve Knuckles regarding the bridge project. Knuckles believes the bridge will be a great opportunity to provide a lifeline connection across north Morro Bay and the Embarcadero. Additionally, the bridge will provide alternative access to the Embarcadero which will enhance the City's emergency response as the existing route is often congested and difficult to maneuver.

Sherrod discussed how the project has evolved from the September 5, 2013 meeting and he provided more detail about the project.

Boardmember Shively asked staff the following questions:

1. He stated Measure Q funds are tied to police and fire services and asked staff if enough of a nexus exists in order to use Measure Q funds to backfill the costs of the project. Livick stated there may be multiple funding opportunities, and Measure Q is just one of them. He stated there is not enough money in the general fund to pay for the project, so the City will explore one time monies instead. Additionally, Livick stated the City will work with SLOCOG to enhance grant opportunities to address some of the more aesthetic features, although this will not apply to the vehicular portions of the project.
2. Shively confirmed with Livick that emergency vehicles will be able to use the dirt Embarcadero to access the bridge. The road is based and will have a structural section of some kind.
3. Shively expressed concern that there may not be enough signage or indicators that would restrain automobiles from crossing the bridge. Livick stated staff will examine different techniques and develop a creative strategy to prevent vehicles from crossing the bridge.
4. Shively expressed concern about the potential conflict between pedestrians and bicyclists on the bridge since the lanes for each mode are not separated. Sherrod explained that when there are multi-modal systems, it is customary to merge them in order to bring all modes of traffic across the bridge, especially since the bridge is not as wide as other sections of the trail.

Boardmember Burkhart asked staff about the maximum load the bridge can support. Sherrod explained the maximum load is 40,000 pounds but the bridge has a safety factor built into the engineering so it is anticipated that the bridge may carry a heavier load than the maximum. The bridge is not designed, however, to carry heavier loads on a regular basis.

Boardmember Owen expressed concern that the bridge is not wide enough to accommodate larger vehicles and asked staff to clarify the width of the dirt road across the bridge. Sherrod explained the dirt Embarcadero varies in width, but on average it is between 21 and 23 feet wide, which is essentially a two lane road. He stated there is enough space for vehicles to pass one another. Livick further explained how narrow roadways are used to slow vehicular traffic, which is desired in situations like this. He stated the City will examine the regulations for signing this location at a slower speed limit (less than 25 mph).

Boardmember Goldman asked staff to clarify whether the bike path will be elevated higher than the dirt road. Sherrod stated the bike path is separated from the road with an elevation difference of about six inches.

Boardmember McPherson clarified with staff that the City would build the smaller bridge if it is unable to raise the additional funds necessary to construct the project as proposed. Boardmember McPherson asked if the Coastal Commission will be reviewing the project. Livick stated the Coastal Commission will be reviewing the project since it is in the original jurisdiction as well as the City's Planning Division since it requires a use permit. Two environmental documents will also be processed with the project.

Boardmember McPherson confirmed with staff the expected start date of construction is September 2014.

Chairperson Makowetski asked staff to clarify whether the project incorporates any handicap features. Sherrod explained the proposed project does not include a handicap ramp. He explained the "roll-out" idea in which a carpet could be rolled from the walkways to the high tide line during the summer months in order to accommodate handicap users. It is a temporary and relatively inexpensive strategy.

Chairperson Makowetski asked staff if the road on the north side of the creek would be changed or left as it when the bridge is installed. Livick stated the intention is to not pave the road and to leave it as is. The City will continue to blade it, as it does in the parking lot near Morro Rock.

Chairperson Makowetski asked how the proposed project intends to discourage motorists from driving onto the bike path from the north side of the bridge. Sherrod explained the six inch raised bike path will bulb-out at the southeast corner of the trail to push vehicles away from bicyclists at that corner.

Chairperson Makowetski confirmed with Sherrod there will still be plenty of room for recreational vehicles to turn around in the north parking lot. Sherrod stated the parking lot will not be greatly affected when the bridge is installed.

Chief Knuckles expounded on Livick's previous comments and added that the bridge is a great opportunity to provide access to the north side of town through the Embarcadero and to be more flexible with respect to emergency response services, especially when Main Street is flooded, because the bridge has a higher elevation than Main Street. The bridge will also provide the high school with an alternative evacuation route if necessary. Lastly, he stated the bridge will be beneficial for police and ambulance services as well as for fire services.

Boardmember McPherson confirmed with Knuckles that the bridge is sufficient to support all of the Fire Department's vehicles except for the ladder truck which weighs over 40,000 pounds.

Boardmember McPherson asked Knuckles how the City would modify the proposed plan if the City is unable to collect the money necessary to support heavy vehicles (40,000 pounds or more) on the bridge. Knuckles stated the biggest threat is fires on the Embarcadero, so he will ensure that fire trucks are able to go across the bridge in order to stop fires in that area.

Chairperson Makowetski opened Public Comment period.

Glen Slowy, asked staff how erosion is being considered in the proposed plan since the bride is proposed to be built over the floodplain. He asked if there is there a threat to the roadway or path from erosion that could occur during those natural events. Rands stated the City has performed a hydraulic analysis and the 100 year flood fits well under the deck of the bridge, so the approaches to the bridge would be free from flooding. With regard to erosion, the creek banks will be left in the same state as they are now. There is a risk that an extreme flood could erode the banks of the creek but the bridge will be designed on piers, so even if the abutments are exposed, the bridge will remain standing.

Chairperson Makowetski closed Public Comment period.

Livick stated the next step is to process a conditional use permit for the project and further develop the design of the project.

MOTION: Boardmember Burkhart moved to include in the previous motion made on September 5, 2013 a 30 percent design increase and the estimated cost of $70,000 to accommodate the needs of the City with fire trucks.

The motion was seconded by Boardmember Goldman and carried unanimously. (7-0).

NEW BUSINESS

None.

FUTURE AGENDA ITEMS

Staff anticipates the following items coming to the Board in the upcoming months:

- NEW Water Reclamation Facility (October)
- Transit Weekend Service (October)

Boardmember Shively asked if a public hearing has been scheduled to discuss different funding mechanisms for roads. Smukler stated a public hearing has not yet been scheduled but explained the City Council has agreed that they are interested in looking at sales tax provisions focused on roads and streets repair. Smukler stated he intends to keep the PWAB and the Chamber of Commerce involved throughout the process.

ADJOURNMENT

The meeting adjourned at 6:56 pm to the next scheduled meeting to be held at the Veteran's Memorial Hall on Thursday, October 17, 2013, at 6:00 pm.

AGENDA NO: A-5

MEETING DATE: November 4, 2013

Staff Report

TO: **Public Works Advisory Board** **DATE: October 29, 2013**

FROM: **Janeen Burlingame, Management Analyst**

SUBJECT: **Report on North Coast Transit Surveys 2013 Project**

RECOMMENDATION

Staff recommends the Board receive the draft San Luis Obispo Council of Governments (SLOCOG) North Coast Transit Surveys 2013 Technical Memorandums 1 and 2 on Existing Conditions and Survey Results, and provide written comments to City Staff as necessary by November 7, 2013 so they can be forwarded to the project consultant to address in the final report.

FISCAL IMPACT

There is no fiscal impact to receiving and reviewing the technical memorandums.

SUMMARY

Since the 2006 adoption of the North Coast Transit Plan, which includes the Morro Bay Component that serves as the City's Short Range Transit Plan for local transit services, major changes have been made to all transit services on the North Coast such as:

1) Regional Transit Authority (RTA) re-instated direct and hourly regional buses to Los Osos along Route 12 instead of the old "short" Route 11 with 2 hour headways and forced transfers;

2) RTA launched a supplemental Route 14 between San Luis Obispo (SLO) and the Cuesta College main campus between SLO and Morro Bay (school year and peak periods only);

3) RTA truncated its coastal route from Hearst Castle to SLO in Morro Bay on weekends with timed transfers between Route 12 from SLO and Route 15 from Cambria;

4) The South Bay Dial-A-Ride was discontinued by the RTA; and

5) Morro Bay replaced its well-established Dial-A-Ride with a weekday deviated fixed-route service, combining fixed route service with demand response Call-a-Ride trips offered within ¾ mile of the one way loop route.

In February 2013, the San Luis Obispo Council of Governments Board awarded a consultant contract for conducting surveys on all fixed-route transit services on the North Coast. This project is funded by a Federal Transit Administration (FTA) Section 5304 small urban grant awarded to the region and the main participants are the RTA and the City of Morro Bay.

The Technical Memorandums provide findings from the review of existing transit services on the North Coast, which significantly changed since the April 2006 North Coast Transit Plan was developed, as well as the onboard passenger survey results.

Prepared By: _JB_ **Dept Review: _RL_**

Several agencies on the North Coast are reviewing and providing comments on the Technical Memorandums for inclusion in the final North Coast Transit Surveys 2013 report that is to be completed in November 2013 and will lead to specific recommendations or implications of the various findings for each transit service on the North Coast.

City Staff has already provided comments and corrections to SLOCOG staff for the consultant to incorporate into the final report.

DISCUSSION

This Staff Report will provide a brief overview of the existing transit services on the North Coast and the survey results as they pertain to Morro Bay's local transit services.

Technical Memorandum 1: Existing Conditions

There are a fairly large number of transit and paratransit options on the North Coast, in spite of its low density, rural character, geographical isolation at its northernmost end and small population base (33,600 total per 2010 Census). Transportation services consist of the following:

A) Three (3) Regional fixed-routes:

1) RTA Route 12: Serves Los Osos with multiple stops, Morro Bay with a single shared stop and transfer point to Morro Bay Transit/Trolley, Cuesta main campus with a single stop instead of the prior three stops, Kansas Avenue and California Men's Colony with flag stops, and downtown SLO transfer center (no more intermediate stop at Cal Poly).

2) RTA Route 15: Serves Hearst Castle, San Simeon, Cambria with multiple stops, Cayucos and Morro Bay with a single shared stop and transfer point to Morro Bay Transit/Trolley and RTA Route 12.

3) RTA Route 14: Serves as a peak period shuttle between the Cuesta main campus and downtown SLO, resulting in 30 minute headways when the college is in session at certain times of the weekdays (Route 12 and 14 combined).

B) One (1) Local fixed-route:

1) Morro Bay Transit: Weekday deviated fixed-route service that connects north and south Morro Bay with the Downtown and City Park with a shared stop and transfer point with RTA Routes 12 and 15. The deviated fixed-route also provides advanced reservation demand response trips off route within ¾ of a mile of the fixed route (Call a Ride).

C) Two (2) Community Vintage Trolleys:

1) Cambria Village Trolley: One route which serves both the East and West Villages along Main Street as well as Moonstone Beach Drive close to motels by the ocean.

2) Morro Bay Trolley: Three routes which serve the Embarcadero, Morro Rock, Downtown, Morro Bay State Park campground, Morro Strand State Beach campground, and several travel trailer parks on Atascadero Road.

D) Two (2) Senior Van/Bus Programs:

1) Cayucos Senior Van: Service is partly funded by the County and is administered and operated by the RTA. This program has strong community support and is available 7 days a week at no charge.

2) Cambria Community Bus: Service is partly funded by the County with additional financial support from the Cambria Community Foundation. The program is administered and operated by a volunteer organization and is available 5 days a week at no charge.

3) Morro Bay Senior Bus: There is a third senior bus program that is being developed in Morro Bay although the actual start date has not been set yet as vehicle acquisition must be completed and a detailed operating plan more fully scoped out. The program is a joint effort by Senior Citizens, Inc., Meals on Wheels and the City.

E) Other Specialized Services:

1) Runabout: This is the Americans with Disabilities Act (ADA) complementary service covering the entire North Coast corridor and operated by RTA. Several conditions must be met to qualify for this Federally mandated service: 1) obtain ADA certification with the RTA, 2) pick up or drop off points only within ¾ miles of any regular fixed-route, and 3) trips are only made during the same hours of operation as the regular fixed-route as they fluctuate by day of the week or route.

2) Ride-On-North Coast Senior Shuttle: This service operates two days a week on Monday and Wednesday by advanced reservations, primarily serving the southernmost part of the North Coast corridor, and one day a week service on Fridays to Los Osos seniors only. Very few trips are provided north of Morro Bay due to the duplication of service with the senior van/bus programs in Cambria and Cayucos. Most trips are round trips to San Luis Obispo, with the exception of Los Osos, where local demand for this service arose from the loss of South Bay Dial a Ride in the summer of 2011.

Technical Memorandum 2: Survey Results

The consultant, using Cal Poly interns, conducted onboard, boarding/alighting and intercept with Cuesta College surveys on all fixed routes in the North Coast. Survey work occurred in mid April 2013 with the except for the Morro Bay seasonal trolley that was done in mid-July 2013.

This Staff Report will highlight for local services some of the results from the onboard and boarding/alighting surveys while more detail of the quantitative results can be found in detail in the Technical Memorandum 2 starting on page 25.

Onboard Surveys: The onboard passenger surveys conducted provide an overview of passenger characteristics and travel patterns. The response rate for Morro Bay Transit was 34.2% and the Trolley was 20% which represents a good response for survey validity.

Demographics:

Morro Bay Transit riders were typically adult (58% age 24 to 61), with a large elderly ridership (12% aged 62-74 and 15% aged 75 or older). Almost three-quarters of the survey respondents are transit dependent as a result of a lack of car or driver's license and one-quarter are discretionary riders who have other modes of transportation but who choose to use transit.

Trolley riders were typically adult (58% aged 24 to 65 and 10% aged 19 to 24) with a fair size elderly ridership (17% aged 64 to 74). Youth riders were not asked to complete a survey which skews the results some, but it was noted that many of the passengers traveled as families with small children. Most of the respondents were not local residents (87%) and those that did indicate they were local residents (10%) half responded they were full time and half responded they were half time residents.

Travel Patterns:
The vast majority of Morro Bay Transit riders walk to and from bus stops (88%), while a very small portion bike, were dropped off or transferred from other routes (4% each). The primary purpose of the trip is personal business (29.6%) or for work (22.2%). Nearly half of respondents ride the bus daily (48%) followed by those who use it 2-4 times per week (41%).

The vast majority of Trolley riders walked to and from the trolley stops (93%), while those who transferred were mostly to/from other trolley routes. The primary purpose for the trip was for sight-seeing (33%) and social/recreational (31%), followed by shopping (18%) and restaurants/bars (14%). Riders primarily chose to use the trolley because it was "fun", convenient, allowed them to avoid driving or because they did not have a car available to make the trip.

Customer Satisfaction:
Riders rated Morro Bay Transit very good (4.5 on a scale of 1 to 5 with 1 being Poor and 5 being Excellent). The three top ranked attributes were on-time performance (4.9), courtesy of drivers (4.8) and a three-way tie between comfort, start time and system safety (4.5). The lowest ranking attributes, which are still ranked "good" overall between 4.2 and 4.3, consisted of convenience of transfers, stops/shelters, end time and convenience of stops.

Riders rated the Trolley very good (4.5 on a scale of 1 to 5 with 1 being Poor and 5 being Excellent). The three top ranked attributes were driver courtesy (4.7), cleanliness (4.7), and overall (4.6). The lowest ranking attribute, which is still ranked "good" overall at 4.3, was frequency of service.

Service Improvements:
Morro Bay Transit riders specified Saturday service (36%), followed by Sunday service (26%), as improvements they would most like to see.

Trolley riders specified service hours should be extended (32%) as a service improvement they would most like to see.

Also included were comments and observations about the trolley relating to routing and schedule adherence that staff has already provided a response to the consultant. The Trolley service was short a driver during the survey period due to an unexpected personal matter that needed to be dealt with by one of the drivers resulting in the lunch relief driver having to drive during the surveying period which necessitated certain deviations on the various routes for lunch coverage that are noted in the Technical Memorandum.

This was an unexpected issue and is not a normal occurrence. When down a driver, the choice is to either eliminate servicing one route altogether or to merge two routes during the shortage and cover the lunches the way they were on the day surveying work was done. Neither is an ideal option, but providing no coverage on a tourist oriented service is not an option. Staff feels the surveying work should have been rescheduled to the next week when all drivers would be working and the relief driver would be covering lunches as the Technical Memorandum gives the impression that these deviations occur all the time and they don't, only during extenuating circumstances.

Boarding and Alighting Surveys: The boarding and alighting surveys conducted provide information about the time of day riders use the system as well as where they got on and off the bus. For the Trolley, there was some difficulty tracking this information due to the circumstances noted above regarding the lunch coverage resulting in the Downtown and North Morro Bay trolleys leaving their own route to cover the other route for one loop during the lunch breaks. However, the data gives a good indication of stops receiving the most use.

Boarding and Alighting by Time of Day:
For Morro Bay Transit, the busiest time of day for boarding and alighting was mid-afternoon for the 1:25 and 2:25 PM runs, followed by 8:25 AM and 12:25 PM. The slowest times of the day were the first and last runs of the day (6:25 AM and 5:25 PM).

The Morro Bay Transit stop at Albertsons was the busiest stop with the stops at Cookie Crock and City Park being the next busiest stops.

For the Trolley, boarding and alighting surveying was split over two days, Friday from 3 to 7 PM and Saturday from 11 AM to 3 PM. The busiest time of day was late afternoon after 4 PM. Saturday was busier than Friday, and Friday after 4 PM was busier than before 4 PM and is consistent with visitors are arriving during the day on Friday and being in town for all of Saturday. Additionally, the individual trolley routes were busy at different times of the day and the North route had more ridership earlier in the day which is consistent with visitors at Morro Strand State Park Campground and the travel trailer parks along Atascadero Road coming into town to spend the day in the downtown and waterfront areas.

The Trolley stop at Market at Morro Bay Boulevard was the busiest which makes sense since is it the transfer point for all three trolley routes. Other stops with high levels of passenger activity included Morro Strand State Park Campground (North Route), Morro Bay State Park Campground (Downtown Route) and many of the stops along the Embarcadero (Waterfront Route).

CONCLUSION

Staff recommends the Public Works Advisory Board receive the draft North Coast Existing Conditions and Survey Results Technical Memorandums from the San Luis Obispo Council of Governments North Coast Transit Survey Project and provide written comments as necessary to City staff by November 1, 2013 so they can be forwarded to the project consultant to address in the final report.

ATTACHMENTS

North Coast Transit Surveys 2013 Technical Memorandum 1: Existing Conditions dated August 2, 2013
North Coast Transit Surveys 2013 Technical Memorandum 2: Survey Results dated September 6, 2013

NORTH COAST TRANSIT SURVEYS 2013

Technical Memorandum One:
Existing Conditions

Prepared for the

San Luis Obispo Council of Governments

Prepared by

LSC Transportation Consultants, Inc.

North Coast Transit Surveys 2013

Technical Memorandum One: Existing Conditions

Prepared for the

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August 2, 2013

LSC Ref. 137060

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Chapter 1
Introduction

PLAN PURPOSE AND CONTENT

Public transportation serves important roles in the North Coast of San Luis Obispo County, providing mobility to area residents, students and employees, helping to improve environmental conditions, and contributing to the economy of the region. Like any business, it is important that the organization understand the perception and needs of its customers (passengers) to guide the provision of public transportation services. The San Luis Obispo Council of Governments (SLOCOG) was awarded a Transit Technical Assistance Grant by California Department of Transportation (Caltrans) to conduct a Transit Ridership Survey for fixed route transit services serving the North Coast of San Luis Obispo County. These services include Morro Bay Transit and selected routes on San Luis Obispo Regional Transit Authority (RTA).

This Technical Memorandum One presents a review of previously conducted studies relevant to the North Coast services, and provides an inventory of transit services operating in the area. Furthermore, a more detailed analysis of operations and performance of Morro Bay's deviated fixed route and RTA's Routes 12, 14 and 15 are provided in this document.

STUDY FOCUS AND ISSUES

A kick-off meeting was held early in the study process to determine specific issues that might be addressed in the conduct of this ridership survey, as well as methodologies for conducting the surveys. Through this meeting and subsequent phone calls, the following transit issues have been identified for the study:

- Transit services on the North Coast have undergone numerous changes in the past five years, and this study will include a narrative and operations data to provide an understanding of what has recently occurred and what services are currently available.

- The purpose of the study is to assess current services through system review and onboard surveys. Both operating efficiencies and passenger opinions should be collected and evaluated.

- Identify who is riding. Are these discretionary riders, or transit dependent?

- Assess the potential for increased or improved ridership from Cuesta College through intercept surveys. This effort will have the dual purpose of assessing how improvements can be made for existing students, as well as how non-riders might be encouraged to ride.

- Provide extensive outreach (notify passengers of survey ahead of time with flyers on buses and at stops; provide notice in the paper regarding survey efforts; place announcement on the website; use Cuesta College outreach resources.)

These issues provided guidance for the direction of the study.

REVIEW OF PREVIOUS STUDIES AND PROJECTS

There are a number of recent studies and projects that preceded this survey which address transit issues and planning in the North Coast region. These studies provided background information for the current ridership survey study. A summary of each report is provided below (in chronological order, starting from the most recent).

Unmet Transit Needs Analysis and Determination, May 2012, *SLCOG*

SLOCOG annually conducts an unmet needs process to determine if all transit needs in the region are reasonably being met. The most recent findings were submitted in May of 2012. In short, the SLOCOG findings were that 42 of the 43 requests were operational and forwarded to the transit providers. One request was initially deemed to meet the "unmet needs" criteria, specifically RTA service to and from Shandon from Paso Robles on Highway 46 with stops at Whitley Gardens and Jardine Road. However, upon further exploration, this request was found not reasonable to meet, and a finding of "no unmet needs" was submitted to Caltrans.

FY 2009-2010 Triennial Performance Audit of Ride On Transportation, May 2012, *PMC*

PMC found RTA-Ride On Transportation in compliance with each of the nine TDA requirements. Two additional compliance requirements did not apply to Ride-On pertaining to farebox recovery ratios, as Ride On's farebox ratio is set by SLOCOG. Ride-On complied with its 10 percent farebox recovery ratio in each audit year. Specific recommendations consisted of the following:

1. Include only CTSA operations data in the annual State Controller Report (not TMA operating data).

2. Tally and summarize customer complaints by type.

3. Update the Short Range Transit Plan and Strategic Plan.

4. Update performance goals by CTSA/TMA program to reflect current trends in service.

5. Show expenditure of TDA by CTSA program in Ride-On Monthly Service Hours Report.

San Luis Obispo Regional Transit Authority Final Report FY 2008-2010 TDA Triennial Performance Audit, April 2011, *TransTrack Systems*

TransTrack Systems found RTA was in compliance with the majority of PUC and CAC requirements. TransTrack made several recommendations including:

1. Improved data compliance by using paid work hours by mode and dividing by 2,000 to arrive at Employee Full Time Equivalents for State Controller reporting.

2. Include farebox recovery compliance information for the Runabout service in the Annual Financial Audit, as well as supplemental schedules for RTA Bus, Runabout, and SLOCAT operations.

3. Obtain assistance to develop and evaluate scheduling, vehicle blocking, and driver assignment options to implement the RTA Transit SRTP recommendations and, in conjunction with SLO Transit, to address coordination issues resulting from recommendations in RTA's SRTP update.

4. Secure capital funding for vehicle replacement and other capital investments with the potential to reduce overall operating costs and maintain a state of good repair.

San Luis Obispo County Area Transit Services Final Report FY 2008-2010 TDA Triennial Performance Audit, April 2011, *TransTrack Systems*

TransTrack Systems found RTA-County Transit was in compliance with the majority of PUC and CAC requirements, with the exception of not meeting minimum farebox return ratios in two instances. TransTrack made several recommendations regarding data reporting including:

1. Improved data compliance by using paid work hours by mode and dividing by 2,000 to arrive at Employee Full Time Equivalents for State Controller reporting.

2. Include County Administrative costs in the farebox recovery compliance information in the Annual Financial Audit and expand information to cover all services. Clarify farebox recovery requirements with SLOCOG.

3. Merge County Transit services into the RTA organization, eliminating the need for quarterly billings and separate TDA Claims, State Controller, Performance Audit, Financial Audit, and Short Range Transit Plan reports.

4. Monitor key performance indicators for County Transit services on a quarterly basis as part of the overall RTA management reporting and take actions to address declining performance on County Transit services.

Morro Bay Transit Final Report FY 2009-2011 TDA Triennial Performance Audit, May 2013, *Nelson Nygaard*

Nelson Nygaard found Morro Bay Transit was in full compliance with all TDA regulations. Additionally, they noted passenger productivity on the new deviated Fixed-Route/Call-A-Ride service increased by 37% over its first two years of operation. Nelson Nygaard made several recommendations including the following:

1. Morro Bay Transit should establish performance standards for all services to better track performance trends. Goals, recommendations and performance standards were included in the 2006 North Coast Transit Plan, but the current service is much changed from the service provided at that time. Ideally, the standards should include cost effectiveness and service efficiency measures that reflect transit industry standards and tailored to the local operating environment.

2. Morro Bay Transit should construct a full ridership profile based on the upcoming *North County Transit Surveys* and additional customer feedback. This information should be used to tailor marketing and public outreach activities. In 2011, the City organized a citywide survey (distributed by mail and also available online) to determine whether modifications to service would better meet the needs of the riders, and to understand why there was a drop in ridership among former DAR riders. Unfortunately, the survey was not statistically valid. As a result, staff have often relied on anecdotal evidence from drivers about possible trends and behaviors among Fixed-Route/CAR riders based on what they hear from riders. Staff noted that currently, they have no way of conclusively identifying why Fixed-Route ridership is steadily increasing while Call-A-Ride ridership remains flat other than anecdotally from riders who say they like not having to call and schedule a ride or that being in a particular area of the city once an hour does not work with the rider's schedule for the trip desired. Therefore, staff should:

    - Gather day-to-day feedback using a "how are we doing" comment/survey form similar to the 2012 Trolley survey that can be stocked aboard FR/CAR transit vehicles (see Recommendation #4 below).

    - To cast a wider net, provide links to any future online surveys in all forms of Morro Bay Transit advertising, including on printed advertisements, on brochures and public access television spots, and during any face to face outreach activities. Survey efforts should include incentives to completing and submitting surveys, such as gift certificates and/or free transit passes.

3. Morro Bay Transit should consider implementing targeted public information campaigns about services to increase ridership among key populations.

4. Morro Bay Transit should make it easier for riders to submit feedback about transit services. Currently, there is no format for submitting feedback other than speaking directly with drivers. The audit recommends establishing a telephone number or website for reaching staff with questions, complaints or commendations, as well as other venues for providing feedback.

San Luis Obispo Regional Transit Authority Short Range Transit Plan, December, 2010, *Majic Consulting Group*

The most recent Short Range Transit Plan for RTA Fixed Routes and Runabout was completed in December 2010 and included an evaluation of existing demographics analysis of transit conditions and performance, and a recommended service plan. A ridership survey was conducted as part of this plan, and the results of those surveys will be compared with results in this current study. The SRTP found that RTA's fixed route was productive with an average of 14.7 passenger trips per hour (in 2007/08-- run-level performance varied greatly with express run at over 25 riders), but had significant on-time performance issues. The farebox ratio was 17.1 percent, which meets minimum standards. The Runabout was not productive at 1.6 passenger trips per hour, but given the long distances of many of the trips, this is difficult to improve.

Three service plan options were recommended:

- A proposed, viable plan, offering a number of route and scheduling revisions for improved efficiency and less redundancy.

- A constrained plan, should funding be reduced, which eliminated several runs on Routes 9 and 10
- An expansion plan, should funding be increased, which added several runs on Routes 9 and 10 and introduced Route 14 to alleviate crowding on runs to Cuesta College.

The expansion plan was implemented.

San Luis Obispo Council of Governments Coordinated Human Services – Public Transportation Plan, October 2007, *A-M-M-A and Judith Norman-Transportation Consultant*

The Coordinated Public Transit-Human Services Transportation Plan for San Luis Obispo County included an analysis of existing conditions, which described existing transportation services and programs, and identified service gaps and needs, as well as funding opportunities. This was followed by identification of potential strategies and solutions to mitigate service gaps, and development of a plan to implement those strategies.

The highest priority strategies included improving coordination, establishing a regional mobility management program, and targeting groups with the highest need for transportation, such as the elderly, disabled and low income individuals.

North Coast Transit Plan 2006: Morro Bay Component; Cambria Component and Los Osos/Baywood Component December 2006, *IBI Group and Lawler Consulting*

The North Coast Transit Plan was developed as three components:

- A Morro Bay component, which evaluated the Dial-A-Ride, Trolley service and RTA Route 12A and 12B. Many of the recommendations were in regard to the DAR, which was discontinued in 2010 and replaced with a deviated fixed route. Other recommendations consisted of developing public-private partnerships to support the Trolley, and improved access to Cal Poly on Route 12.

- A Cambria component, which evaluated the Cambria Trolley and Cambria Community bus and RTA Route 12. One finding was that the Cambria Village Trolley was competing with the Cambria Community Bus for the local senior transit market. Recommendations from the study included maintaining existing services, establishing a fare policy for the trolley including a 10 percent minimum farebox return; developing an agreement between the Cambria Community Bus and the Cayucos Senior Center for weekly service to San Luis Obispo; exploring vanpools and carpools for hospitality industry employees; converting the Cambria Community Bus from a volunteer program to a general public dial-a-ride; and refocusing the trolley on tourists.

- Los Osos/Baywood, which focused Route 11, which has since been discontinued.

Chapter 2
Overview of Transportation Services on the North Coast

TRANSPORTATION ON THE NORTH COAST

In terms of transit services, the North Coast of San Luis Obispo County encompasses San Simeon at the northern-most point, Los Osos on the south end, and includes Cuesta College to the east. The incorporated town of Morro Bay and unincorporated communities of Cambria and Cayucos are also part of this region. The 2010 population of these communities was approximately 33,600, according to the US Census Bureau: 14,726 in Los Osos, 10,234 in Morro Bay, 6,032 in Cambria, 2,592 in Cayucos and 462 in San Simeon. The region is known for tourism, though Los Osos, also known as a bedroom community to San Luis Obispo.

There are many transportation services available in this area, both public and private, as shown in Figure 1. These are discussed generally in this chapter, with detailed information on the RTA and Morro Bay services in subsequent chapters. Operating characteristics of the transportation providers on the North Coast are shown in Table 1.

TRANSIT PROVIDERS

An inventory of all transit providers is presented below, with further detail on services which are being surveyed provided in Chapters 3 and 4.

RTA

The San Luis Obispo Regional Transit Authority (RTA) is a Joint Powers Agency (JPA) formed by the cities of San Luis Obispo, Morro Bay, Atascadero, Arroyo Grande, Paso Robles, Grover Beach, and Pismo Beach and the County of San Luis Obispo. The RTA operates regional fixed routes and complementary paratransit throughout San Luis Obispo County. Routes on the North Coast include:

- **RTA Route 12**: Primarily hourly service between Morro Bay and San Luis Obispo, and serving Los Osos and Cuesta College. Service is operated from 6:30 AM to 6:30 PM weekdays using two buses, with reduced hours on Saturday and Sunday.
- **RTA Route 14**: Weekday service between downtown San Luis Obispo and Cuesta College operated seven times per day in each direction only when the college is in session. As an incentive to Cuesta, RTA offers free rides on both Routes 12 and 14 for the first two weeks of each quarter.
- **RTA Route 15**: An intercity route between Morro Bay, San Simeon and Hearst Castle, also serving Cayucos and Cambria. Five round trips are operated weekdays and Saturdays, and three round trips on Sundays.

Figure 1
North Coast Transit Service
RTA Routes 12-14-15, Morro Bay Transit, and Cambria Trolley

Legend

Regional and Local Transit Routes

- RTA Route 12, Short (SLO-MB-LO-MB-SLO)
- RTA Route 12, Long (SLO-MB-LO-MB-SLO)
- RTA Route 14 (SLO to Cuesta College)
- RTA Route 15 (Morro Bay to Hearst Castle)
- Cambria Trolley (serviced by RTA)
- Morro Bay Transit: Fixed Route
- Morro Bay Trolley

Regional and Local Transit Stops

- RTA stops, time points
- RTA stops, non-time points
- Local transit stops, time points
- Local transit stops, non-time points
- Transit Center

Roadways

- Freeway and Expressway
- Rural 2-Lane Highway
- Major Roadways
- Union Pacific Railroad
- Regional Parks and Golf Courses
- City limits
- Unincorporated communities

San Luis Obispo Council of Governments

Map purpose: North Coast Transit Survey RFP
Map created by: Geoffrey Chiapella, SLOCOG
Date created: January 4, 2013

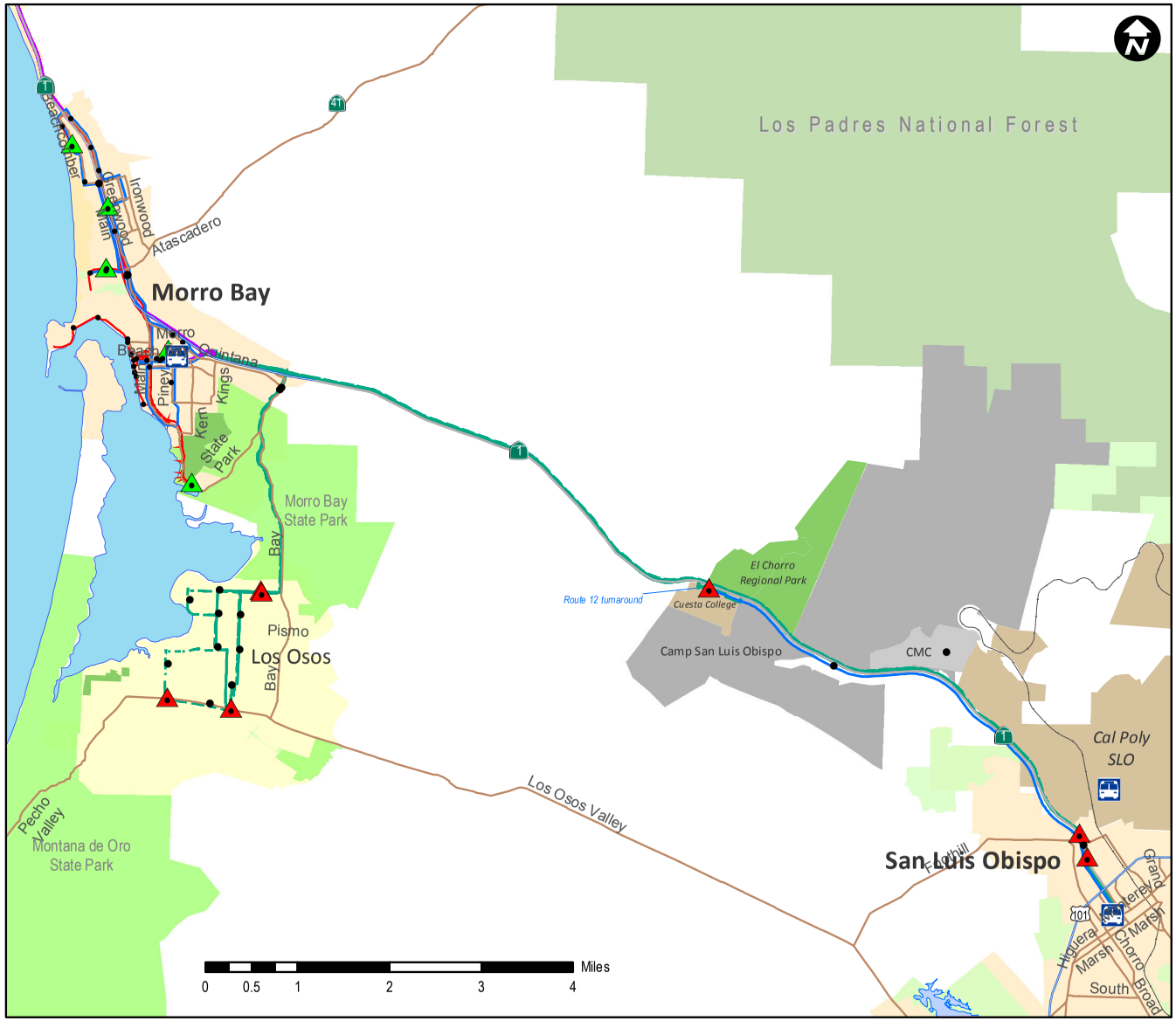


TABLE 1: Inventory of Transit Services on the North Coast of San Luis Obispo County

Data is from FY 2011-12 unless otherwise specified.

				General Hours of Operation			*Annual Operations*				
Provider / Type of Service	**Route # or Service Name**	**Ridership Eligibility**	**Service Area**	**Weekdays**	**Saturdays**	**Sundays**	**Operating Cost**	**Vehicle Miles**	**Vehicle Hours**	**Ridership**	**# of Vehicles**
RTA											
Fixed Route	Route 12	None	SLO-Cuesta-Morro Bay-Los Osos	6:30 am-10:00 pm	7:30 am-8:30 pm	8:30 am-6:30 pm	$697,701	1,999	5,711	172,528	2
Fixed Route	Route 14	None	SLO-Cuesta	7:40 am-4:00 pm	No	No	$25,149	18,335	534	18,335	2
Fixed Route	Route 15	None	Morro Bay - San Simeon	6 am-7 pm	7 am-9 pm	8 am-7 pm	$28,456	71,477	2,055	18,024	1
Dial-a-Ride	Runabout	ADA	3/4 mi of routes Countywide	--same as fixed routes--			$2,130,025	444,634	21,128	32,929	NA
Cambria Trolley [1]	Cambria Trolley	None	Cambria to San Simeon Point	10:00 AM-4:00 PM Th-Sun., Summers			$44,577	7,930	510	2,424	1
Morro Bay Transit											
Deviated Fixed Route	Fixed Route	None	Morro Bay	6:25 am-6:45 PM	No	No	$233,643	31,064	2,798	15,703	1
Route Deviations	Call-a-Ride	None				--same as fixed route--				1,707	--
Morro Bay Trolley	Waterfront	None	Morro Bay	Trolleys Memorial Day to Labor Day: 11 am-7 pm Fri/Sat; 11 am - 6 pm Sun/Holidays; 11 am-5 pm Mon			--	--	--	--	1
Morro Bay Trolley	Downtown	None	Morro Bay				--	--	--	--	1
Morro Bay Trolley	North Morro Bay	None	Morro Bay				--	--	--	--	1
Trolley Total							$80,769	14,785	1,521	20,647	4
Cayucos Senior Center	Volunteer	Seniors	Cayucos to Morro Bay/SLO	To Morro Bay 2nd & 4th Tues; to SLO 3rd & 5th Tues if demand			NA	NA	NA	NA	NA
Cambria Community Bus	Dial-a-Ride	ADA or 60+	Cambria and San Simeon	8:00 am-4:30 pm	No	No	$42,000	NA	NA	8,350	2
SLOCAT Senior Van											
Cayucos	Dial-a-Ride	ADA	Cayucos to SLO	Mon & Wed anywhere between Cambria and SLO; Friday anywhere within Los Osos.			NA	7,880	NA	508	NA
Cambria	Dial-a-Ride	ADA	Cambria to SLO				NA	23,650	NA	7,326	NA

Note 1: Cambria Trolley data is from July 1 to September 3, 2012.

Source: LSC Transportation Consultants, Inc.

These services are discussed in detail in the Chapter 3.

RTA Runabout

Runabout is the ADA complementary paratransit service for all local and regional fixed route services in San Luis Obispo County, excluding urbanized areas. On the North Coast, the service is provided in the area within ¾ of a mile of Route 15 (except the service area in Morro Bay served by Morro Bay Transit), as well as the area within ¾ of a mile of Routes 12 and 14. In 2011-12, a total of 34,424 one-way passenger-trips were provided in the North Coast area. A comparison of ridership from August 2011 to January 2012 and August 2012 to January 2013 indicates that ridership increased by approximately 7 percent (from 16,967 to 18,180). Service efficiency is relatively low for this service considering the low ridership demand and long travel distance: only 1.5 passengers are carried per hour of service on average.

North County Beach Shuttle

This RTA service is being introduced this coming summer. A shuttle will be offered from Paso Robles, downtown Templeton and Atascadero to Morro Bay & Cayucos beaches. Three trips will be operated five days per week (Tuesdays through Saturdays) from June 7 to August 24, 2013.

Cambria Trolley

The Cambria Trolley is a seasonal trolley operated by RTA, originally the result of a 1998 Unmet Transit Needs findings, when the service was directly overseen by the County and the local operating subsidy came from the Cambria Community Services District. Since 2007, this service was transferred to the RTA and in recent years receives support from the Cambria Chamber of Commerce. Service is operated from 10:00 AM to 4:00 PM Thursday through Sunday from Memorial Day weekend to Labor Day weekend, including Memorial Day, Fourth of July and Labor Day. Service is operated on half-hourly headways between Main Street and Eaton Road on the east end of Cambria and San Simeon Pines Resort on the west end, serving West Village, East Village and Moonstone Beach. The trolley is provided free to passengers due to the support of the Chamber of Commerce. Connections to RTA Route 15 (serving Hearst Castle, Cayucos, and Morro Bay) are available from most of the Trolley stops.

According to RTA County Area Transit reports, 2,424 passenger trips were provided in the summer of 2012 (May 25 to September 3). The operating cost was $44,577 for 510 hours and 7,930 miles of service, including overhead costs. This equates to a cost of $18.39 per passenger trip. Revenues of $5,940 were collected, requiring $38,637 in subsidy, equal to a subsidy of $15.94 per passenger trip.

Prior to the summer of 2012, the Cambria Trolley had been operated nearly year round with an operating cost in excess of $200,000. Operating costs at that time were $160.68 per hour. The hourly operating cost in 2012 was $87.35.

Morro Bay Transit

Morro Bay Transit operates a route deviation service in Morro Bay as well as three summer trolleys. These services are discussed in detail in Chapter 4.

Ride-On North Coast Senior Shuttle

Ride-On has been providing transportation for residents and visitors of San Luis Obispo County since 1993. They offer door-to-door transportation 24 hours a day every day with advance reservations. Services include:

- Door-to-door rides for seniors on select days of the week (Monday and Wednesday only on the North Coast)
- Contract service for developmentally disabled clients of the Tri-County Regional Center (their largest market)
- Rides for veterans to VA clinics (a relatively new program)
- Medi-Cal and CenCal transportation (a growing market)
- Special event group transportation (separate operation under the umbrella of the Transportation Management Association, as opposed to the Consolidated Transportation Services Agency)
- Airport/Amtrak pick up and drop off

Ride-On has a fleet of more than 90 vans, buses and wheelchair lift-equipped vehicles. The senior shuttles are for those seniors aged 65 years and over who cannot use the bus service or need assistance in traveling. Only 4 trips a month are offered to each individual senior.

The North Coast Senior Shuttle serves the communities of Cambria, Cayucos, Morro Bay and Los Osos, including service from these communities to San Luis Obispo. Service is offered Monday and Wednesday from 9:00 AM to 4:00 PM. Advance reservations are recommended, generally requiring passengers to call at least 3 to 4 days in advance. Based on ridership statistics for May and October of 2012, ridership on this service is estimated to be approximately 750 one-way passenger trips annually. An estimated 30 percent of trips were provided within Los Osos, 28 percent between Los Osos and San Luis Obispo, 27 percent between Morro Bay and San Luis Obispo, and less than 3 percent within Morro Bay. While service is available north of Morro Bay, no trips were made in Cambria or Cayucos during these months, partly due to potential duplication with existing senior vans with more affordable rides. The ridership pattern is somewhat reflective of the discontinuation of the South Bay Dial-a-Ride in August 2011 and the Morro Bay Dial-a-Ride in July 2010.

Cayucos Senior Van

In addition to the North Coast Senior Shuttle operated by Ride-On, the Cayucos Senior Van is operated by the Cayucos Senior Center 7 days a week. The van goes to Morro Bay San Luis Obispo and other further destinations past San Luis Obispo. Each ride is free and there is no age criteria to qualify for the service, operated by volunteer drivers. County TDA funds provide a mileage allowance for those trips.

Cambria Community Bus

The Cambria Community Bus operates within Cambria and San Simeon Monday through Fridays from 8:00 AM to 4:30 PM (with the last pick up available at 4:30 PM). Service is available to seniors aged 60 or over, and to disabled individuals. On average, the bus serves 8,350 passenger trips annually. Service is provided using a network of 35 volunteer drivers and two community-owned vehicles and private vehicles. Volunteers are not reimbursed for mileage on their vehicles.

The community bus has an annual cost of approximately $42,000. Passengers do not pay a fare; but the agency accepts donations. The two vehicles are cutaway airport shuttle type buses on Ford E350 chassis. One bus was funded by a grant from SLO Air Pollution Control District plus a match from the Cambria Community Council. The second bus was funded by a grant from a local non-profit organization (Cambria Anonymous Neighbors). The vehicles seat 8 passengers plus one wheelchair position. One bus has 228,000 miles and the other has 74,500 miles. The higher-mileage bus is expected to be replaced in April 2013.

Chapter 3
RTA North Coast Routes

INTRODUCTION

The previous chapter introduced all of the transportation services available on the North Coast of San Luis Obispo. This Chapter provides detailed information on the RTA routes which service the North Coast region, consisting of Routes 12, 14 and 15. These routes will be surveyed as part of this project.

History of RTA Transit Services on the North Coast

One goal of this survey study is to understand the trends in services provided on the North Coast in order to identify needs and transit barriers, and opportunities for improved services. A particular challenge is that services on the North Coast, and in Los Osos in particular, have undergone numerous changes in the past few years so that data is not clearly comparable over time. A description of these changes will help to put the available data into context.

Efficient service to the unincorporated "bedroom community" of Los Osos is challenging based on its geographically remote location and street layout. Many streets are unpaved and/or are dead-end streets. Sidewalks are narrow or non-existent in many of the neighborhoods making it unfriendly to pedestrians and difficult to provide ADA compliant stops. Furthermore, as a somewhat isolated bedroom community with low-density residential neighborhoods, creating an efficient service plan has been difficult. In order to address service needs, RTA has tried several different service plans over the years, as follows:

Before 2008: On weekdays, Route 12 operated on 60 minute headways (12 round trips per day) between Morro Bay and San Luis Obispo (SLO) and a more limited frequency (three round trips) between Morro Bay and Cayucos/Cambria. On Saturdays and Sundays, Route 12 operated three round trips from SLO serving Morro Bay, Cayucos and Cambria. Route 12 Sunday service was provided as a funded pilot project through February 2007, but subsequently was discontinued. Ridership was relatively strong (approximately 20 passengers per revenue hour on weekdays and 7 passengers per revenue hour on Saturdays in FY 2005/2006), and the farebox recovery was 32.9% on weekdays and 18.9 % on Saturdays the same year. Most of the Route 12 ridership was on the Morro Bay to SLO segment of the route. The majority of riders were carried to or from the city of San Luis Obispo. The lack of direct p.m. service from Cal Poly to North Coast communities discouraged Cal Poly commute ridership from Morro Bay, as Cal Poly passengers had to take SLO Transit into San Luis Obispo and transfer to the north-bound Route 12.

Fall 2010: Service to Cal Poly was eliminated from Route 12 which sped service between Los Osos, Morro Bay, and Cuesta to downtown SLO. This was especially an improvement for connections in northernmost SLO County (San Simeon, Cambria and Cayucos).

In an attempt to meet the highest passenger needs, and to eliminate unproductive stops, as well as to address on-time issues, in 2010 RTA staff also tried to reconfigure service through Los Osos to reduce running times. This met with resistance by local advocates and instead RTA staff proposed a change in travel direction to eliminate several slow left hand turns. This change required new bus stops on the opposite side of the streets, but very little change to the service coverage.

August 2011: Dial-a-Ride was eliminated and Route 14 was established, adding peak service from SLO to Cuesta College (via Cal Poly). Routes 11 and 13 were introduced, and Route 12 was streamlined. The local Dial-A-Ride program operated by RTA was expensive to operate and served a small number of community members. To serve the most popular destinations within the community, RTA rerouted the service along South Bay Boulevard and created new bus stops in order to serve the Ralphs, Vons, the Pharmacy and Hardware Store (along Los Osos Valley Road at Ralphs and Vons). At the same time, a request from Los Osos Community Advisory Council (LOCAC) for service along Los Osos Valley Road to south SLO led to a proposal for new service to south SLO along Los Osos Valley Road to a connection point at South Higuera and Suburban. However, because of limited operating funds, service was provided on hourly headways along Los Osos Valley Road towards SLO (route 13) with a one hour trip back through Los Osos (Route 11) towards Morro Bay, which connected to an abbreviated Route 12 that still provided hourly headways between SLO and Morro Bay

In 2011, RTA also responded to high demand between SLO and Cuesta College by adding peak service via a new Route 14. There was little impact on cost, because RTA was already running peak tripper buses to support heavy loads on Route 12 between 8 am to 10 am and 1 pm to 4 pm. Rather than run back-to-back service, Route 14 was scheduled to provide half hour service frequency between SLO and Cuesta College.

Summer 2012: Routes 11 and 13 were eliminated; Route 12 was restructured; and Cal Poly service was eliminated from Route 14 (providing direct service between downtown SLO along Santa Rosa/Hwy 1 to Cuesta College). The Route 14 scheduling allowed the driver to turn around and operate tripper runs on Route 12 at the busiest times. Prior to this change, the Los Osos Valley Road service to south SLO was underutilized. The low support for the new routes could have been due to a lack of awareness or lack of convenient connections to South County destinations (there were good connections with RTA Route 10 and SLO Transit Route 2 along South Higuera to downtown), or there could have been difficulty in communicating the complex schedule or other factors. The hourly service through Los Osos continued, but at different time points every other hour.

As a response to poor ridership on the new service, in the summer of 2012, RTA eliminated Routes 11 and 13 and reinstated the combined Route 12 that traveled into Los Osos on Santa Isabel Street (serving Santa Isabel @ 15th street, but not serving the Ralphs and Vons stops along Los Osos Valley Road). There were some complaints by regular riders about losing the Ralphs/Vons service. While not as close as previously, the main 10th and Los Osos Valley Road stop is still within 0.4 miles of the Ralphs stop and 0.2 miles of the Vons stop.

One benefit of the Summer 2012 changes were that the service allows for more efficient driver scheduling and lower operating costs, though there is a downside of potential passenger confusion. A relief break is built into the schedule in Morro Bay in an attempt at facilitating more direct service for commuters. For example, the 20-minute breaks in the morning are scheduled before making the Los Osos trip (to accommodate morning commutes traveling from Los Osos toward SLO) and in the afternoons the break is scheduled after the Los Osos service. Driver lunch breaks are accommodated by scheduling four short trips during the day: two off-peak hours in the mid-morning and two off-peak hours in the evening. This limited schedule is operated on 12 of 16 daily trips.

Summer 2013: No immediate service changes are planned in Los Osos. Construction in the area continues to make service and communication of service in this area very problematic. In the upcoming three to five years, if there are sufficient operating funds to add service, RTA will consider re-instatement of commuter routes along Los Osos Valley Road to the big box stores along Los Osos Valley Road and South San Luis Obispo Road, as well as the possibility of another express trip to Cal Poly.

Summary: Because of the myriad changes in the past several years, year-to-year ridership statistics are not comparable and therefore no reliable trends can be discerned. The addition of Routes 11 and 13 created some “double counting” of passengers transferred in Morro Bay towards SLO. Data gathering for specific rider segments is also difficult to assess. RTA has indicated that they assume most of the traffic is going between Los Osos to SLO, but there are also segments of ridership traveling between Los Osos to Morro Bay, and Los Osos to Cuesta College. Based on low support for service to and from points within the community, it appears that local ridership within Los Osos is a very small segment of the ridership. Further analysis on customer ridership needs (and needs of those who are not currently riding) would be helpful for future planning.

CURRENT RTA ROUTES SERVING THE NORTH COAST

Route 12

Route 12 operates between the Government Center in San Luis Obispo and Morro Bay, serving Cuesta College and a loop through the community of Los Osos. The service operates hourly on weekdays, plus a morning and afternoon run specifically to serve Cal Poly rather than Cuesta College. Hours of operation are from 6:23 AM to 10:03 PM. On weekends, service is provided every other hour from San Luis Obispo to the Government Center, with Cuesta College served on call and the Los Osos loop served hourly. Saturday service starts at 7:23 AM and ends at 8:28 PM, while Sunday service is operated from 8:23 AM to 6:28 PM.

Connections to other RTA routes and SLO Transit routes are available at the Government Center, while connections to RTA Route 15 and Morro Bay Transit are available at Morro Bay Park in Morro Bay.

Heavy road construction has been underway in Los Osos for the past year and is scheduled to continue for several more years, which routinely requires RTA to adjust the route and schedule within the area. The construction has also affected on-time performance.

Route 14

Route 14 provides service between Cuesta College and downtown San Luis Obispo during the school year, with seven trips provided in each direction every weekday. The trip requires only 12 to 13 minutes of travel time, which results in layover times of up to a half hour. Several of the runs are interlined with RTA Routes 9, 10 and 12 to reduce the need to layover.

Route 15

Route 15 operates between Hearst Castle and Morro Bay, serving the communities of San Simeon, Cambria and Cayucos. Five weekday and Saturday round trips are operated, and three on Sunday. The first and last runs of the day do not serve Hearst Castle. The route provides connections to Route 12 and Morro Bay Transit at the Morro Bay Park.

Runabout

The Runabout is an ADA Paratransit program providing ADA complementary service throughout San Luis Obispo County. On the North Coast, the service area is within ¾ of a mile of Routes 12, 14 and 15, except for the area served by Morro Bay Transit as it provides dial-a-ride service within ¾ of a mile of the fixed route. The Runabout offers priority preferences to ADA certified passengers, but will serve others as well if capacity is available. Service is operated during the same hours as the fixed routes.

EXISTING SERVICE CALENDAR

RTA observes the following holidays:

- New Year's Day
- Memorial Day
- Independence Day
- Labor Day
- Thanksgiving Day
- The day after Thanksgiving (limited)
- Christmas Eve (limited service)
- Christmas Day

Routes are modified or not operated on these days.

EXISTING FARE STRUCTURE

RTA offers a variety of fare options to the public, as shown in Table 2. Regular cash fares for RTA service are from $1.50 to $3.00, depending on distance of travel. Fifty percent discounts are offered to seniors (aged 65 to 79), youth (K-12), and disabled and medicare card holders. Transfers are free when passengers pay the full fare between Route 15 and 12 only, but are not available on return trips, or on RTA Routes 9 or 10.

TABLE 2: RTA Fares for North Coast Transit

General Public Cash Fares

To/From	San Luis Obispo	Kansas / CMC / Cuesta College	Morro Bay / Los Osos	Cambria / Cayucos / San Simeon
San Luis Obispo	$1.50	$2.00	$2.50	$3.00
Kansas/CMC/Cuesta College	$2.00	$1.50	$2.00	$2.50
Morro Bay / Los Osos	$2.50	$2.00	$1.50	$2.00
Cambria / Cayucos / San Simeon	$3.00	$2.50	$2.00	$1.50

Discount Fares are half the regular cash fares for seniors (age 65-79), students (K-12), disabled and medicare card holders.

Transfer tickets are free when passengers pay the full fare between Route 15 and 12 only. Transfer tickets are not available on return trips, or on RTA Routes 9 or 10.

Pass Fares

Pass Types	General Public	Discounted
Regional Day Pass	$5.00	NA
RTA & SCAT 7-day Pass	$14.00	NA
RTA 31-day Pass	$44.00	$22.00
Regional 31-day Pass	$64.00	$32.00
RTA and SCAT Stored Value Card	$15.00	--

Source: LSC Transportation Consultants, compiled from RTA Website.

In addition to base fares, a number of passes are available. Unlimited day pass fares are $5.00 and 7-day pass fares good on both RTA and SCAT services are $14.00. There is no discount on Day Passes. RTA 31-day passes (good for 31 days from date of purchase) are $44.00 for the general public, discounted to $22.00 for seniors, youth, and disabled and medicare card holders and are accepted on all RTA routes. Regional day and Regional 31 day passes, good on RTA, SCAT, SLO Transit, Morro Bay Transit, Paso Express and the El Camino Shuttle are $64.00 for the general public, discounted to $32.00.

EXISTING RIDERSHIP AND SERVICE LEVELS

Annual ridership for FY 2012-13 on RTA's North Coast fixed route services was 242,605 one-way passenger-trips, with 75 percent of the ridership on Route 12 weekday service. As discussed in the history section above, because of the way ridership was counted and because there was a different route structure in 2011-12 than there is now, ridership numbers are not comparable by route. However, because linked trips were likely over counted previously and the total fixed route RTA ridership on the North Coast increased (from 240,665 in 2011-12 to 242,605 in 2012-13), it appears that ridership is increasing in the region and the current service plan seems to generate more ridership than the previous route structure.

Ridership by Month

Monthly ridership data by route/service for the most recent fiscal year is presented in Table 3 and Figure 2. As shown, fixed route ridership is highest in the month of October, followed by September and March, reflecting the peak demand during college sessions. Ridership was the lowest in June, when college is out but summer tourism has yet to pick up.

Average Passengers per Hour by Service

To get an idea of the productivity of each route, the annual average passengers-per-service hour were charted (for Fiscal Years 2011-12 and 2012-13). As shown in Figure 3, Route 14 had the highest productivity with an average of 41.5 passengers carried per service hour (double from the previous year). This was followed by Route 12 weekday service (29.4 passengers per hour—a decrease over the previous year). Route 12 service was not offered on weekends in 2011-12, but had a productivity of 16.9 passengers per hour of service in 2012-13. Route 15 had the lowest productivity of the fixed routes at 8.5 passengers per hour on weekdays and 5.8 on weekends. Productivity was improved on weekdays in 2012-13, but decreased on weekends, possibly indicating it is less likely to be used recreationally than previously, and more for commuting or school.

TABLE 3: RTA North Coast Operating Data by Month

Data from FY 2012-13

	Passengers						Vehicle Miles						Vehicle Hours					
Month	**Route 12 Weekdays**	**Route 12 Weekends**	**Route 14**	**Route 15 Weekdays**	**Route 15 Weekends**	**Total North Coast**	**Route 12 Weekdays**	**Route 12 Weekends**	**Route 14**	**Route 15 Weekdays**	**Route 15 Weekends**	**Total North Coast**	**Route 12 Weekdays**	**Route 12 Weekends**	**Route 14**	**Route 15 Weekdays**	**Route 15 Weekends**	**Total North Coast**
July	12,984	1,278	45	1,905	387	16,599	14,568	2,031	300	6,449	2,091	25,439	517	75	11	185	60	848
August	16,277	998	1,747	1,950	374	21,346	15,955	1,810	1,138	7,063	1,912	27,878	566	67	35	203	55	925
September	17,677	1,620	2,205	1,446	390	23,338	13,180	2,262	1,809	5,835	2,391	25,477	468	83	53	168	69	841
October	19,796	1,195	3,159	2,155	357	26,662	15,955	1,810	2,477	7,063	1,912	29,218	566	67	72	203	55	962
November	15,246	998	2,674	1,576	352	20,846	14,095	1,810	1,802	6,321	1,912	25,940	500	67	52	182	55	856
December	11,954	1,274	1,502	1,389	329	16,448	12,929	2,262	1,126	5,885	2,391	24,593	459	83	33	169	69	813
January	14,179	936	1,701	1,496	281	18,593	15,261	1,810	901	6,756	1,912	26,640	542	67	26	194	55	883
February	16,614	1,161	2,538	1,514	352	22,179	13,874	1,810	2,027	6,142	1,912	25,765	492	67	59	177	55	849
March	17,351	1,625	2,465	1,533	389	23,363	14,568	2,262	2,365	6,449	2,391	28,034	517	83	68	185	69	923
April	15,575	1,379	2,427	1,508	343	21,232	15,261	1,810	1,914	6,756	1,912	27,654	542	67	55	194	55	913
May	14,875	1,208	1,645	1,552	307	19,587	15,261	1,810	1,914	6,756	1,912	27,654	542	67	55	194	55	913
June	10,109	1,070	0	974	259	12,412	13,874	2,262	0	6,142	2,391	24,669	492	83	0	177	69	821
Total	*182,637*	*14,742*	*22,108*	*18,998*	4,120	*242,605*	*174,783*	*23,746*	*17,772*	*77,619*	*25,040*	*318,960*	*6,204*	*873*	*517*	*2,232*	*720*	*10,546*

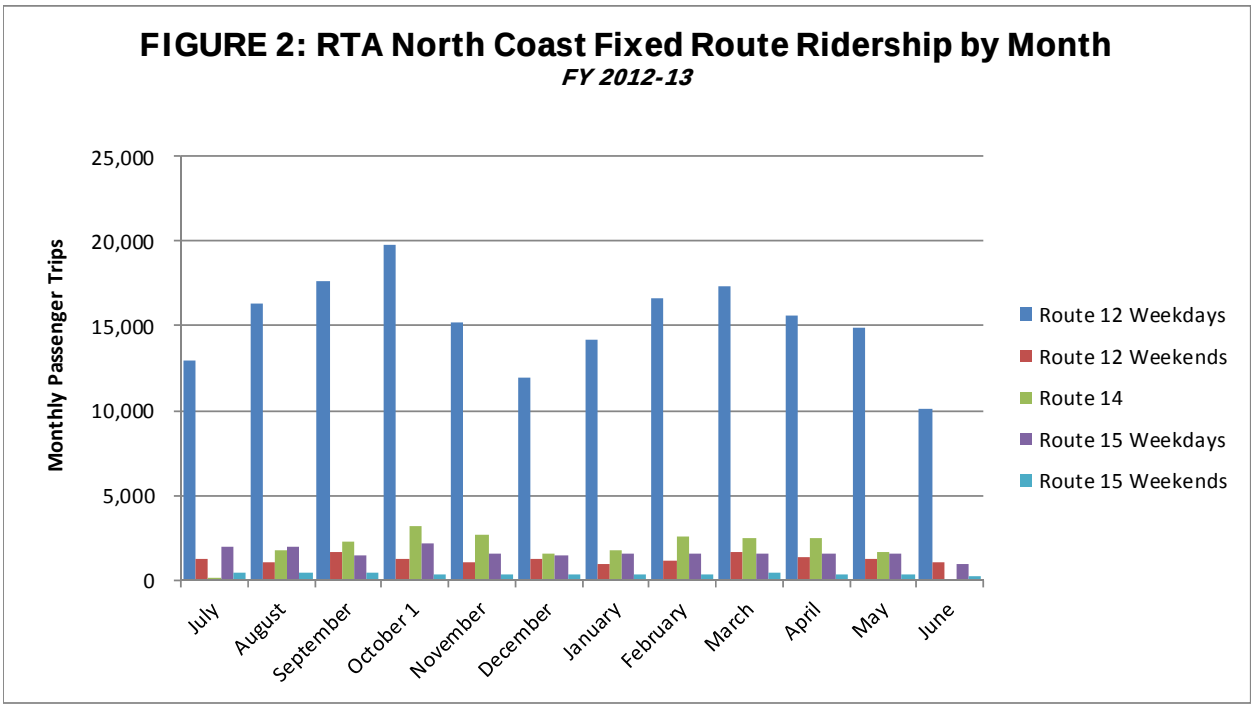


FIGURE 2: RTA North Coast Fixed Route Ridership by Month
FY 2012-13
Monthly Passenger Trips
25,000
20,000
15,000
10,000
5,000
0
July
August
September
October 1
November
December
January
February
March
April
May
June
Route 12 Weekdays
Route 12 Weekends
Route 14
Route 15 Weekdays
Route 15 Weekends

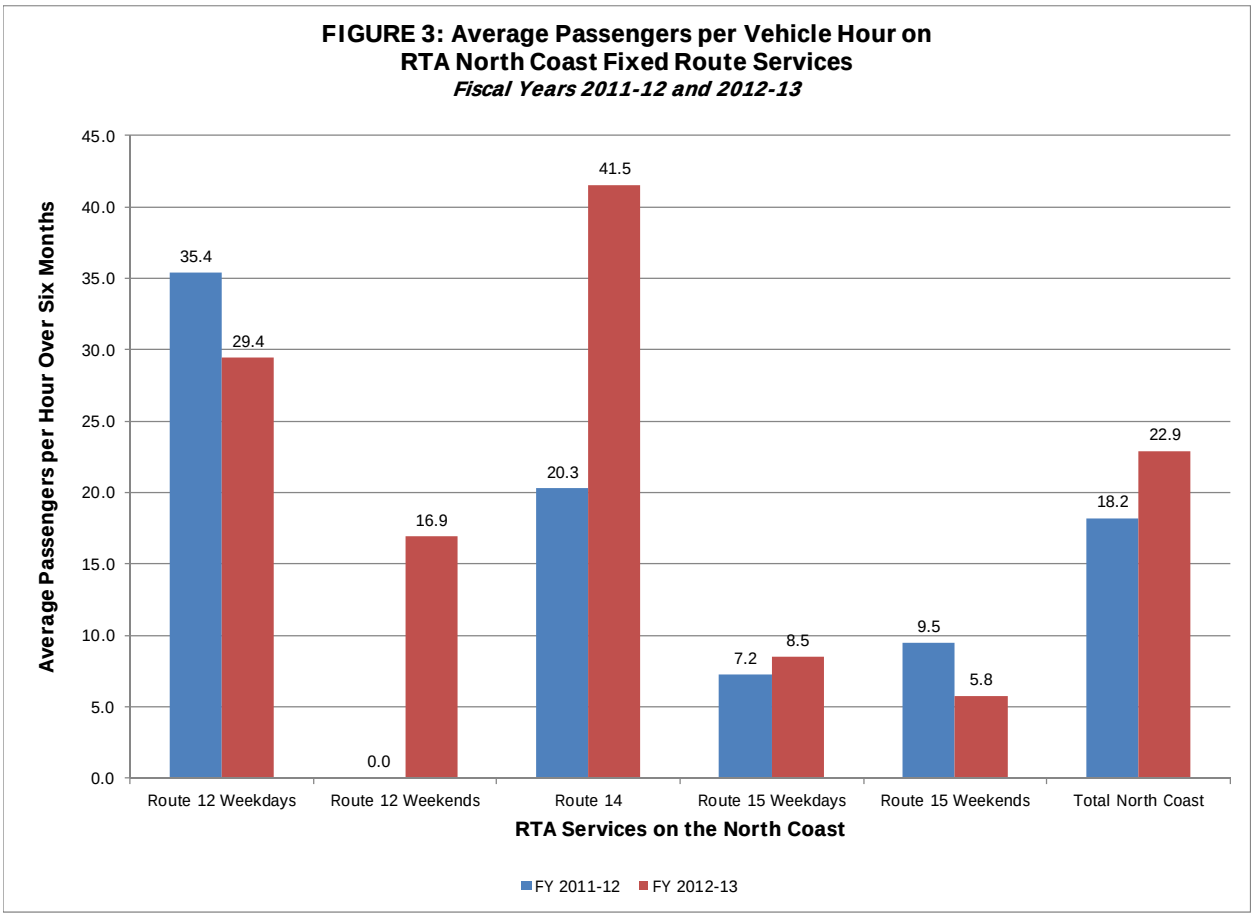


FIGURE 3: Average Passengers per Vehicle Hour on
RTA North Coast Fixed Route Services
Fiscal Years 2011-12 and 2012-13
Average Passengers per Hour Over Six Months
45.0
40.0
35.0
30.0
25.0
20.0
15.0
10.0
5.0
0.0
35.4
29.4
0.0
16.9
20.3
41.5
7.2
8.5
9.5
5.8
18.2
22.9
Route 12 Weekdays
Route 12 Weekends
Route 14
Route 15 Weekdays
Route 15 Weekends
Total North Coast
RTA Services on the North Coast
FY 2011-12
FY 2012-13

FINANCIAL CHARACTERISTICS/PERFORMANCE

RTA Weekday Revenues, Expenses and Performance

RTA tracks system fare revenues, expenses and performance by weekday. For this report, it is most useful to evaluate weekday data from 2012-13 to best understand the trends occurring on RTA services. Data for Fiscal Year 2012-13 was only available through May 2013 for this report. As shown in Table 4, nearly $290,000 in fares was collected on RTA fixed route services on weekdays on the North Coast. It should be noted Route 11 was discontinued in July of 2012.

Also shown in Table 4, Route 12 and 14 had strong farebox recovery ratios at 33.8 and 39.5 percent, respectively, while Route 15 had an adequate farebox recovery at 10.5 percent. The subsidy per passenger trip was $2.68 on Route 12 and $2.03 on Route 14, compared to an average of $3.42 on the combined North Coast weekday services, and $13.52 on Route 15.

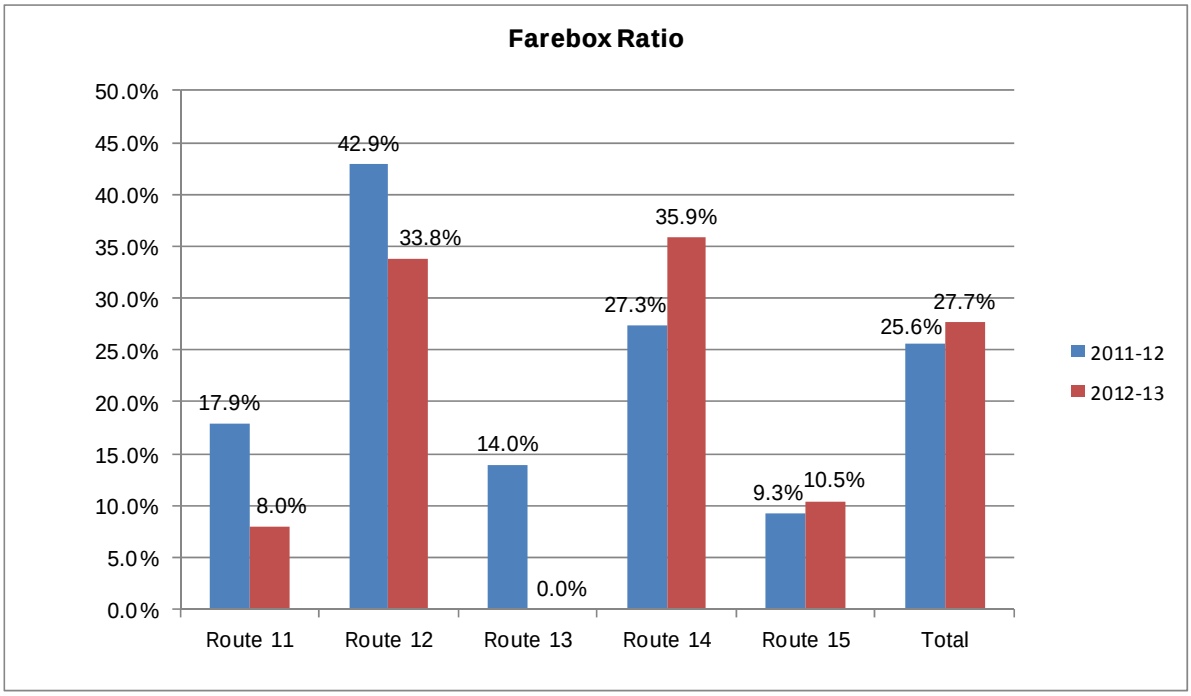
TABLE 4: RTA North Coast Fixed Route Weekday Financial and Performance Data
Fiscal Year 2012-13 (through May 2013)

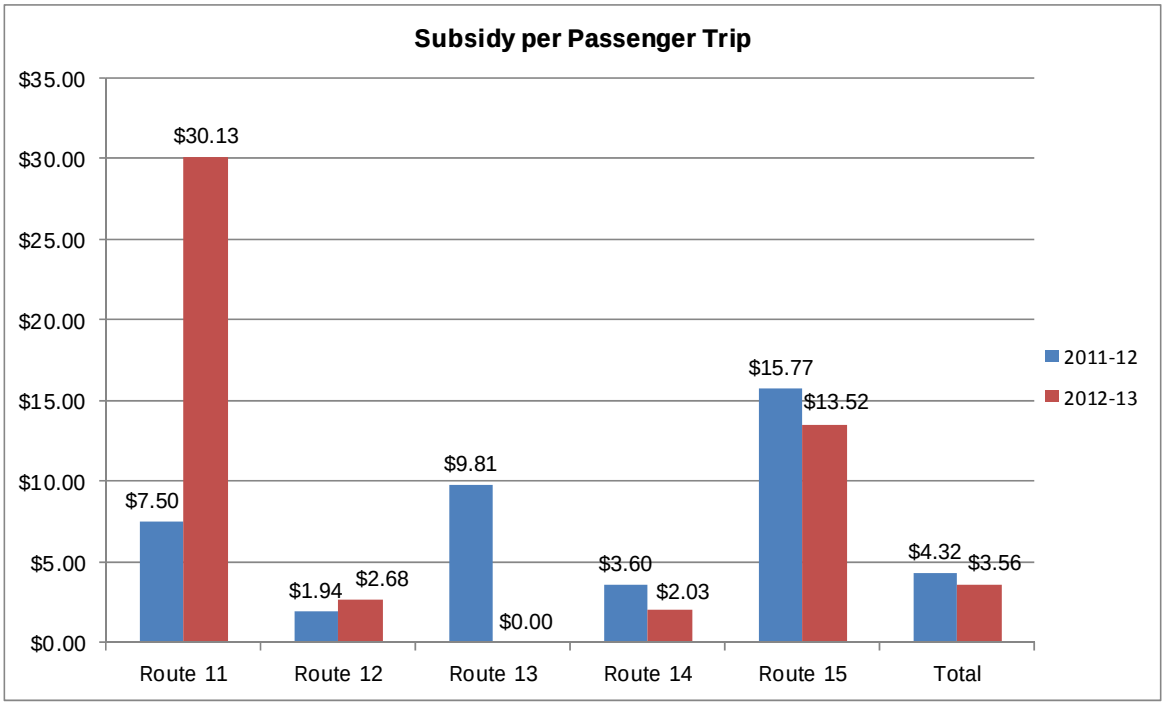
Operating Characteristics	Route 11 [1]	Route 12	Route 14	Route 15	Total
Total Route Revenues (Fares)	$626	$235,602	$25,149	$28,456	$289,833
Expenditures					
Administration	$1,434	$130,605	$12,220	$47,010	$191,269
Marketing	$116	$13,283	$1,270	$4,781	$19,449
Operations / Contingency	$4,203	$374,473	$36,056	$140,609	$555,341
Fuel	$1,710	$151,642	$17,427	$67,375	$238,154
Insurance	$334	$27,699	$3,144	$12,309	$43,486
Total Expenditures	$7,797	$697,701	$70,118	$272,083	$1,047,699
Farebox Ratio	8.0%	33.8%	35.9%	10.5%	27.7%
Ridership	238	172,528	22,108	18,024	212,898
Service Miles	1,999	160,909	18,335	71,477	252,720
Service Hours	67	5,711	534	2,055	8,367
Riders per Mile	0.1	1.1	1.2	0.3	0.8
Riders per Hour	3.6	30.2	41.4	8.8	25.4
Cost per Passenger	$32.76	$4.04	$3.17	$15.10	$4.92
Subsidy per Passenger	$30.13	$2.68	$2.03	$13.52	$3.56

Note 1: Discontinued in July 2012
Source: RTA, compiled by LSC Transportation Consultants.

Comparisons of service in 2011-12 versus 2012-13 are difficult to make on an individual basis because of the counting procedures and the continually changing services. Nonetheless, Figure 4 shows a comparison of the farebox ratio and subsidies per passenger trip on the RTA North Coast fixed route services. Even given the variances in data collecting, the overall trends indicate an improvement in the farebox return ratio and a reduction in the subsidy required per passenger trip provided.

FIGURE 4: Performance Measures on RTA North Coast Fixed Routes





Note: Fiscal Year 2012-13 data is from July 2012 to May 2013 (June 2013 data not yet available)

Source: RTA, compiled by LSC Transportation Consultants, Inc.

Chapter 4
Morro Bay Transit

Chapter 3 introduced all of the transportation services available on the North Coast of San Luis Obispo. This Chapter provides detailed information on the Morro Bay Transit services on the North Coast, including the deviated fixed route service and the Morro Bay Trolleys. These services will be surveyed for this project.

BACKGROUND

Morro Bay Transit is a municipal operation, with services contracted out to MV Transportation. Transportation services were first offered by Morro Bay as a demand-response service in 1977, and in the summer of 1994 the City introduced a seasonal Trolley service. Primarily due to the reduction in Transportation Development Act (TDA) funding as a result of the recession, Morro Bay Transit in 2010 completely restructured its transit services, replacing a 30-year-old general public demand-response service with the deviated Fixed Route service. Initially, the plan was to provide an hourly deviated Fixed Route service with deviations only for seniors and persons with disabilities, but since capacity constraints failed to materialize, the deviations were opened up to the general public as well.

The new service, including new service hours and fares, debuted on July 1, 2010. As is common with major revisions to services and fare structures, Morro Bay Transit experienced an initial drop in ridership, although within one year some former DAR users began to return to the service. Since the service restructuring, route deviation trips have been relatively stable and Fixed Route ridership has steadily increased. Morro Bay Transit staff occasionally receives calls from Los Osos residents who no longer have regular Dial-A-Ride service to their area. (Los Osos residents still have fixed route transit service on RTA Route 12.)

Important changes also occurred on the management side due to funding constraints. Staff roles and duties were consolidated. For example, the General Manager assumed the role of dispatcher, reporting and fielding dispatch calls, in addition to oversight of day-to-day operations. All drivers are also cross-trained to act in a dispatching capacity as well.

Management Structure

Morro Bay Transit is governed by the Morro Bay City Council as the ultimate policy and decision-making body. Operating responsibilities are split between City staff and the contractor, currently MV Transportation. The City's Management Analyst provides most of the planning and operational oversight, while financial matters are handled by the City's Administrative Services Director.

MV Transportation provides a General Manager for Morro Bay Transit who also serves as the route deviation dispatcher and as a relief driver when needed. MV Transportation also employs two (2) drivers for the deviated fixed Route service. Drivers are also cross-trained to take calls from passengers requesting deviations.

MORRO BAY SERVICES

Deviated Fixed Route Service

Morro Bay Transit operates a fixed route with route deviations offered to all points within three-quarters of a mile of the route. The route runs between downtown and Morro Strand State Beach in the northern part of the city. The route operates on an hourly basis with time in the schedule to accommodate deviations (referred to as "Call-a-Ride" by Morro Bay Transit). Service is provided Monday through Friday from 6:25 AM through 6:45 PM (prior to July 2012, service operated between 6:40 AM to 5:30 PM).

Morro Bay is also served by RTA Routes 12 and 15 on weekdays, Saturdays, and Sundays. Route 12 operates between San Luis Obispo, Morro Bay, and Los Osos, an unincorporated community to the south of Morro Bay. Route 15 operates between Morro Bay and San Simeon along State Route 1, serving other coastal communities as well. Routes 12 and 15 offer connections with Morro Bay Transit services at the Morro Bay Park bus stop, located near the intersection of Harbor Street and Piney Way. Morro Bay Transit does not serve Los Osos.

Seasonal Trolley Service

Morro Bay Transit also operates a seasonal trolley service, which began in 1994. The trolleys operate along three routes that serve the waterfront, downtown and Morro Bay Golf Course, and downtown and Morro Strand State Beach. As with the Fixed Route/Call-A-Ride service, the trolley service allows flag stops along the three routes.

From Memorial Day to Labor Day, service is operated from 11:00 AM to 7:00 PM Fridays and Saturdays, 11:00 AM to 6:00 PM Sundays and Holidays, and from 11:00 AM to 5:00 PM on Mondays. Service is not operated on Tuesdays, Wednesdays, or Thursdays. From Labor Day to the first weekend in October, service is operated from 11:00 AM to 7:00 PM Saturdays and 11:00 AM to 6:00 PM Sundays. Trolley hours are extended on July 4th until one hour after the end of the fireworks show.

Although the trolleys are primarily intended to serve tourist traffic, locals also use the trolleys on weekends in lieu of the Fixed Route/Call-A-Ride service, which does not operate during these times.

The trolley vehicles are also used for special events during the winter months, such as the Caroling Cop Cars around the December holiday season. At these times, the service is free of charge to passengers (and the City pays the driver rate directly).

Current Fare Structure

The fare structure for Morro Bay Transit deviated fixed route is shown in Table 5. As indicated, the base fare is $1.50, discounted to $0.75 for seniors and persons with disabilities. Up to two children under the age of five ride free with a paying adult. The route deviation fare is $2.50. Day passes are available for $4.00 for the general public or $2.00 for a discounted pass. Punch passes (11 rides) are available for $15.00 for the general public, $7.50 for elderly and disabled, and $25.00 for route deviations, providing one free ride for the purchase of ten. RTA 31-day and one-day passes are accepted on Morro Bay Transit.

TABLE 5: Morro Bay Transit Fare Structure

	Services		
Fare Type	**Fixed Route**	**Call-A-Ride**	**Trolley**
General Public			
One-Way	$1.50	$2.50	$1.25
11-Ride Punch Pass	$15.00	$25.00	--
Day Pass	$4.00	--	$3.00
Discount [1]			
One-Way	$0.75	$2.50	--
11-Ride Punch Pass	$7.50	$25.00	--
Day Pass	$2.00	--	--
Youth under age 5 [2]	Free	--	Free
Youth aged 5 to 12	--	--	$0.50
Transfers	NA	NA	Free

Note 1: Seniors (65 & over) and passengers with disabilities are eligible for the discount fare.

Note 2: Up to two youth aged 5 and under ride free on the Fixed Route and Trolley. Youth age 5 to 12 are offered discounts on the Trolley.

Source: Morro Bay Transit

The current fares were increased in July, 2012 from $1.25 to $1.50 for the general public and from $0.60 to $0.75 for elderly and persons with disabilities. At the same time, hours of operation were expanded in both the morning and the evening, as described above. Prior to the route deviation service Dial-A-Ride fares were $2.00 for the general public, discounted to $1.50 for elderly and disabled passengers.

Trolley fares are $1.25 for the general public over age 13 and $0.50 for children aged 5 to 12. Up to two children age 5 and under ride for free with a paying adult. A day pass is available for $3.00. Transfers are free and are provided as a hand stamp. No regional RTA fare media is accepted on the trolleys.

Call-A-Ride Reservations and Other Service Policies

Morro Bay Transit accepts service requests for the Call-A-Ride during a two-hour period, from 8 AM to 10 AM every day. Service must be requested 24 hours in advance of a scheduled ride, although from time to time passengers who request rides without sufficient notice will be accommodated if capacity permits; these passengers will be charged an extra $1.00 for a ride. Should a passenger call outside of the two-hour reservation window, they are asked to leave a message on an answering machine and their call will be returned in order to schedule the ride.

The three-quarter of a mile deviation from the Fixed Route is a strict rule. According to MV Transportation Staff there have been several occasions when requests were refused for people who live one full mile (or more) from the service area. The service accepts flag stops along the route.

Trolley Sponsorship Program

The City has a sponsorship program with the objective of securing additional revenues for the trolley. In 2011 and 2012, the Community Foundation focused on advertising as a strategy for garnering advertising revenues for trolley. Revenues from advertising sales are split between the two institutions; the City feeds this revenue back into the operation of the trolley program (and includes the revenues as part of its farebox recovery ratio). Additionally, a few local hotels paid a set amount to the trolley service that in return allowed their guests to ride the trolley free of charge. This resulted in hotel patrons accounting for about one percent of trolley ridership. This program will continue in 2013.

RIDERSHIP AND PERFORMANCE

Deviated Fixed Route

Total annual ridership for FY 2011-12 deviated fixed route service was 17,410 passenger trips, including 1,707 deviations (almost ten percent of the total). Ridership was highest in May and June of 2012, as shown in Table 6. While this could be seasonal, it also is likely a result of the service gaining ridership as more people become aware of the service and accustomed to using it, as the service replaced a very expensive Dial-a-Ride.

Table 6 also shows revenue hours and miles, which can be used to evaluate service performance. Some performance indicators are summarized below:

TABLE 6: Morro Bay Transit Operating and Performance Data by Month

Data from FY 2011-12

Month	Operating Cost	Farebox	Total Passengers	Fixed Route Passengers	Dial-a-Ride Passengers	Vehicle Hours	Vehicle Miles	Psgrs per Vehicle Hour	Psgrs per Vehicle Mile	Operating Cost per Psgr Trip	Average Fare per Psgr Trip	Average Subsidy per Psgr Trip
July	$18,265	$821	1,115	1,015	100	218	2,559	5.1	0.44	$16.38	$0.74	$15.64
August	$21,019	$1,051	1,421	1,276	145	250	2,991	5.7	0.48	$14.79	$0.74	$14.05
September	$19,163	$1,085	1,340	1,171	169	228	2,704	5.9	0.50	$14.30	$0.81	$13.49
October [1]	$19,398	$814	1,385	1,232	153	232	2,676	6.0	0.52	$14.01	$0.59	$13.42
November	$17,916	$1,063	1,531	1,365	166	215	2,278	7.1	0.67	$11.70	$0.69	$11.01
December	$19,919	$953	1,463	1,294	169	238	2,713	6.1	0.54	$13.62	$0.65	$12.96
January	$18,966	$836	1,296	1,192	104	227	2,575	5.7	0.50	$14.63	$0.64	$13.99
February	$18,029	$860	1,251	1,128	123	215	2,466	5.8	0.51	$14.41	$0.69	$13.72
March	$20,278	$1,013	1,500	1,343	157	249	1,863	6.0	0.81	$13.52	$0.68	$12.84
April	$19,913	$1,048	1,522	1,395	127	238	2,703	6.4	0.56	$13.08	$0.69	$12.39
May	$20,868	$1,115	1,766	1,600	166	249	2,843	7.1	0.62	$11.82	$0.63	$11.19
June	$19,907	$1,217	1,820	1,692	128	238	2,693	7.6	0.68	$10.94	$0.67	$10.27
Total	*$233,643*	*$11,876*	*17,410*	*15,703*	*1,707*	*2,798*	*31,064*	*6.2*	*0.56*	$13.42	*$0.68*	*$12.74*
Monthly Average	*$19,470*	*$990*	*1,451*	*1,309*	*142*	*233*	*2,589*					

Note 1: Farebox reduced by $212.90 for Rideshare Transit Tuesdays free

Source: Morro Bay Transit

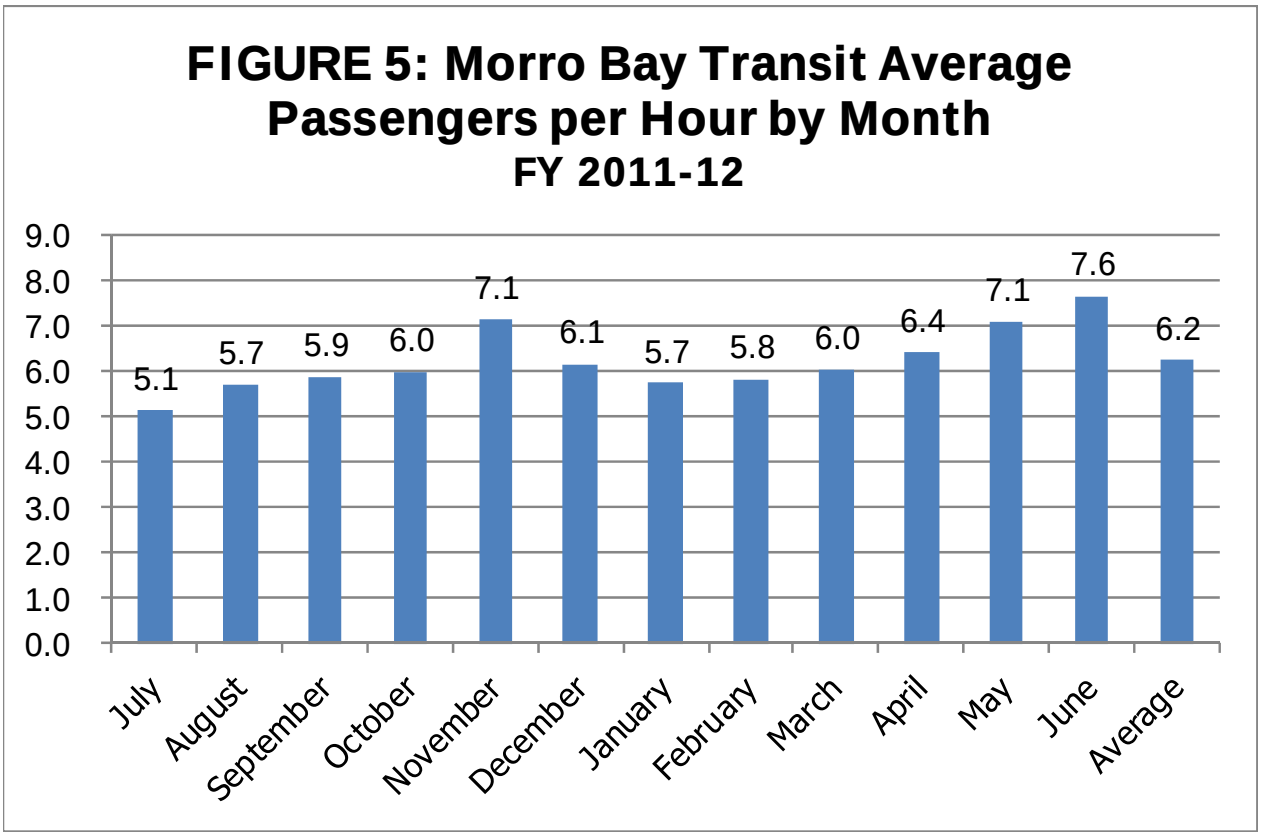
- Productivity can be evaluated in terms of **passenger-trips per service hour.** As shown in Table 6 and Figure 5, the average passenger trips per service hour ranged from a low of 5.1 in July of 2011, to a high of in June of 2012, with a slight increase in November (7.1 passenger trips per hour). The annual average was 6.2. Again, it should be noted that the trend was for continued improvement throughout the year as the service has begun to grow.

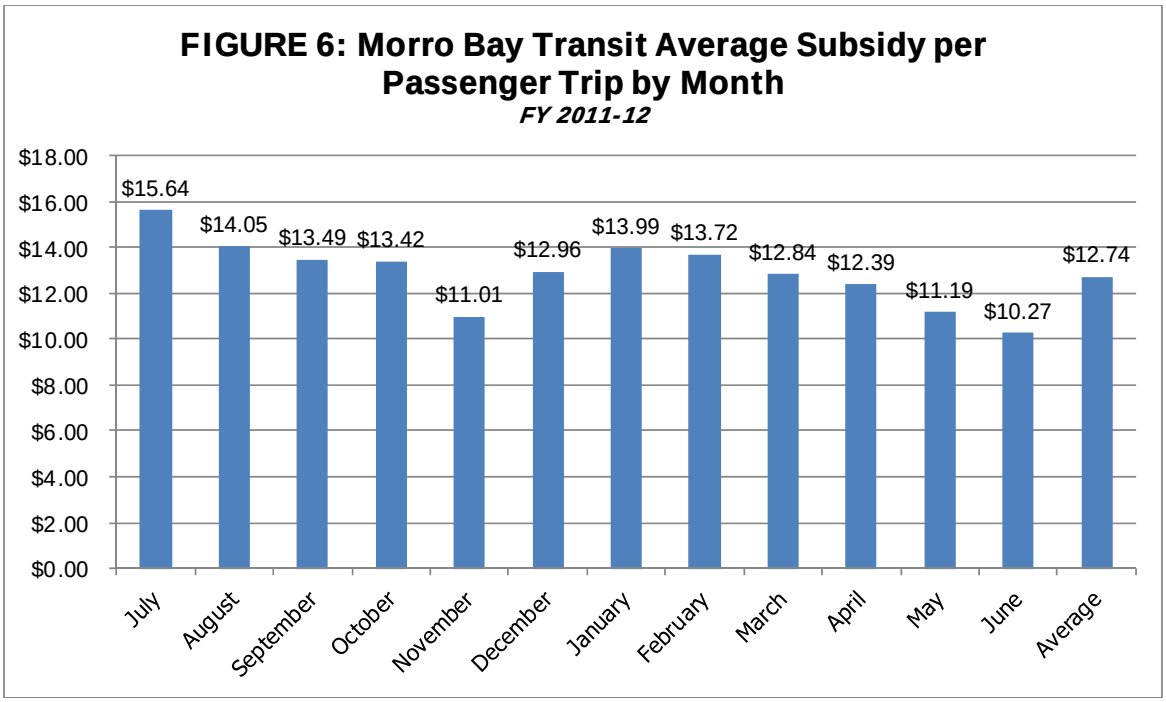
- Dividing the operating cost by the number of passenger-trips served on each route yields the **operating cost per passenger-trip**. As shown in Table 6, the operating cost started at $16.38 per passenger trip in the beginning of the fiscal year (July 2011), and generally improved throughout the year to reach $10.94 per passenger trip in June of 2012.

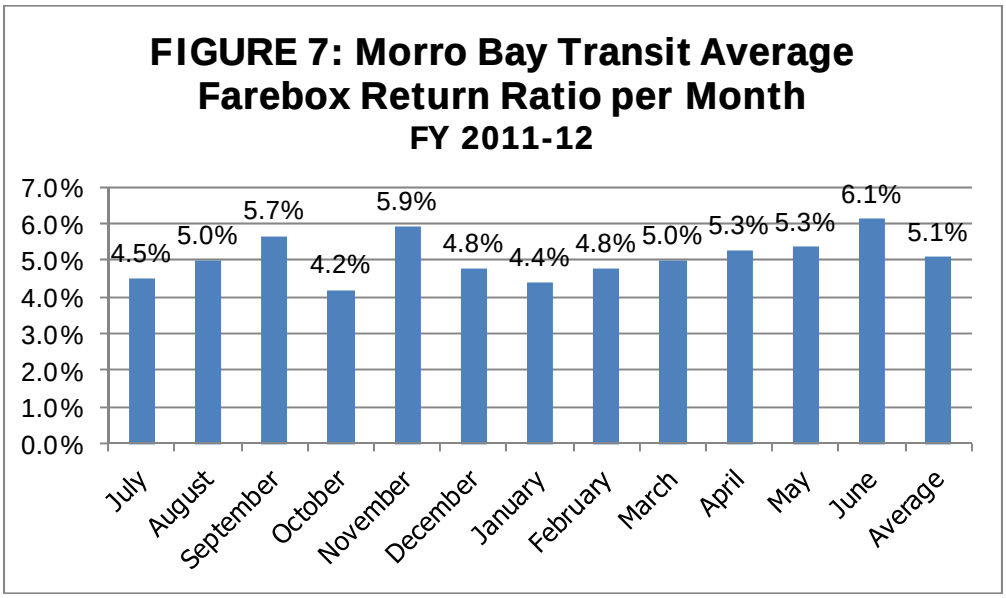
- The **subsidy per passenger-trip** is calculated by subtracting fare revenues from the operating cost and dividing by the number of passenger-trips. This is a particularly useful performance measure, as it directly relates the key public input to a public transit program (subsidy funding) with the key output (passenger-trips). As shown in Table 6 and Figure 6, the subsidy per passenger trip decreased from $15.64 per passenger trip in the beginning of the fiscal year (July 2011), and was reduced to $10.27 by June of 2012.

- The **farebox ratio** is calculated by dividing the passenger revenues by the operating costs. As also shown in Figure 7, the farebox ratio ranges from a low of 4.2 in October to a high of 6.1 in June. The transit service will eventually be required to meet a minimum farebox return ratio of 10.0 percent, but is given a two year grace period as a new transit service.

- Also shown in Table 6 is the service effectiveness of the MBT system based on the number of **passenger-trips per service-miles**, which averaged 0.56 over the year.







Summer Trolley Service

In the recent past, the Trolley service was substantially affected by the 2008 recession due to its orientation and appeal to tourists. Even though local hotels and occupancy has begun to climb, City staff have noted that ridership on the Trolley service is increasing more slowly. Additionally, news of the potential closure of the campground at Morro Strand State Beach also impacted Trolley ridership because the amount of reservations decreased.

It should be noted that during FY 2011-12, the City reorganized the Public Service Department and as a result of subsequent reallocation of transit staff (primarily the Management Analyst) duties, the cost allocation plan was revised. At that time, staff determined that the cost allocation plan had previously – and erroneously – allocated all of the labor expenses to Dial-A-Ride (later Fixed Route/Call-A-Ride), which resulted in overcharging this service. To correct this error, an adjustment was made in labor hours to appropriately charge time between the Fixed Route/Call-A-Ride and the Trolley service. This meant there was a one-time charge in FY 2012 to the Trolley budget in the amount of $18,662, which is a major source of the large increase in expenditures that year, as noted in Table 7. Another fiscal impact in the budget was that City staff began including proceeds from the sale of advertising on Trolley vehicles to support the service's farebox revenue in FY 2010-11.

Historic Ridership

Ridership for the Morro Bay Trolley service from 2006-07 to 2011-12 is shown in Table 7 and Figure 8. While growth was strong from 2006-07 to 2008-09 (14,778 passenger trips to 23,752), the economic downturn had a strong impact on ridership in subsequent years, and ridership has since remained between 20,000 to 21,000. It should be noted that the number of service hours was also highest in 2008-09.

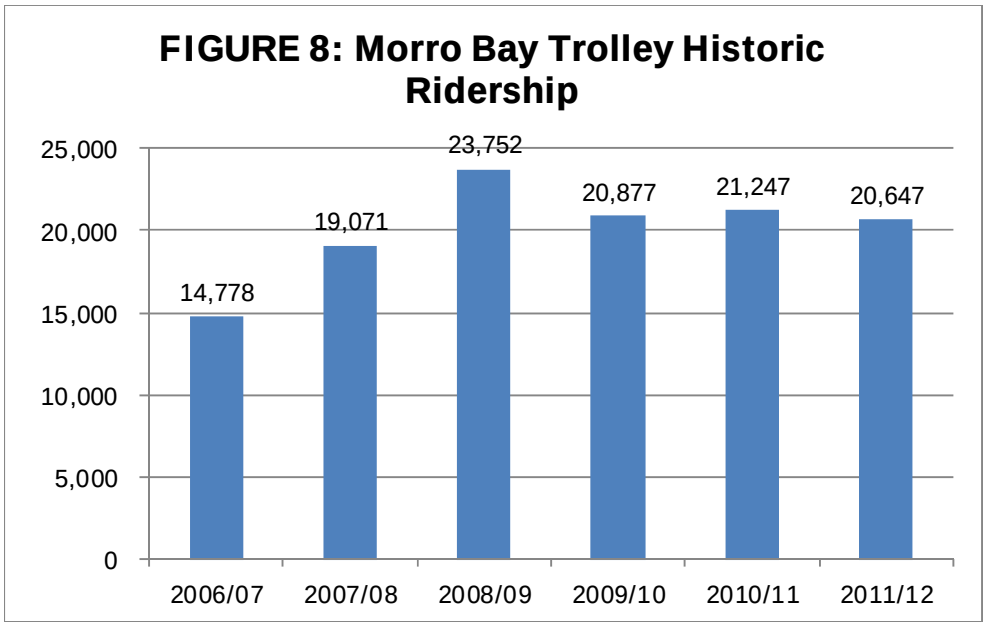
TABLE 7: Morro Bay Trolley Operating and Performance Data by Year

Operating Characteristics	***FY 2006/07***	***FY 2007/08***	***FY 2008/09***	***FY 2009/10***	***FY 2010/11***	***FY 2011/12***
Operating Cost [1]	$37,740	$53,778	$65,624	$57,109	$59,265	$80,769
Trolley Fare Revenue	$5,074	$8,530	$11,918	$15,363	$14,758	$15,806
Advertising Revenue [2]	$5,070	$4,986	$6,684	$4,063	$6,136	$5,046
Total Revenue (Fare + Advertising)	$10,144	$13,516	$18,602	$19,426	$20,894	$20,852
Vehicle Service Hours	1,166	1,345	1,632	1,477	1,478	1,521
Vehicle Service Miles	12,305	14,847	17,384	15,453	14,498	14,785
Passengers	14,778	19,071	23,752	20,877	21,247	20,647
Performance Indicators						
Oper. Cost per Hr. (Actual $)	$32.37	$39.98	$40.21	$38.67	$40.10	$53.10
Oper. Cost per Psgr. (Actual $)	$2.55	$2.82	$2.76	$2.74	$2.79	$3.91
Psgrs. per Hour	12.7	14.2	14.6	14.1	14.4	13.6
Psgrs. per Mile	1.2	1.3	1.4	1.4	1.5	1.4
Farebox Recovery - With Ad Rev (Actual $)	26.9%	25.1%	28.3%	34.0%	35.3%	25.8%

Source: TDA Triennial Performance Audits (FY 2006-09 and FY 2010-2012), compiled by LSC Transportation Consultants, Inc.

Note 1: Large increase in expenditures from FY 2010-11 to FY 2011-12 primarily due to use of new cost allocation plan for Trolley budget. The additional amount from the use of the cost allocation plan was $18,662.

Note 2: Advertising revenue was first used by Morro Bay staff to supplement Trolley farebox revenue in FY 2011.



Performance Measures

Table 7 also shows revenue hours and miles, which can be used to evaluate service performance, as summarized below:

- **Passenger-trips per service hour** are shown in Table 7 and Figure 9. As indicated, the average passenger trips per service hour ranged from a low of 12.7 in FY 2006-07 to a high of 14.6 FY 2008-09. In the most recent year (2011-12), an average of 13.6 passengers was carried per service hour.

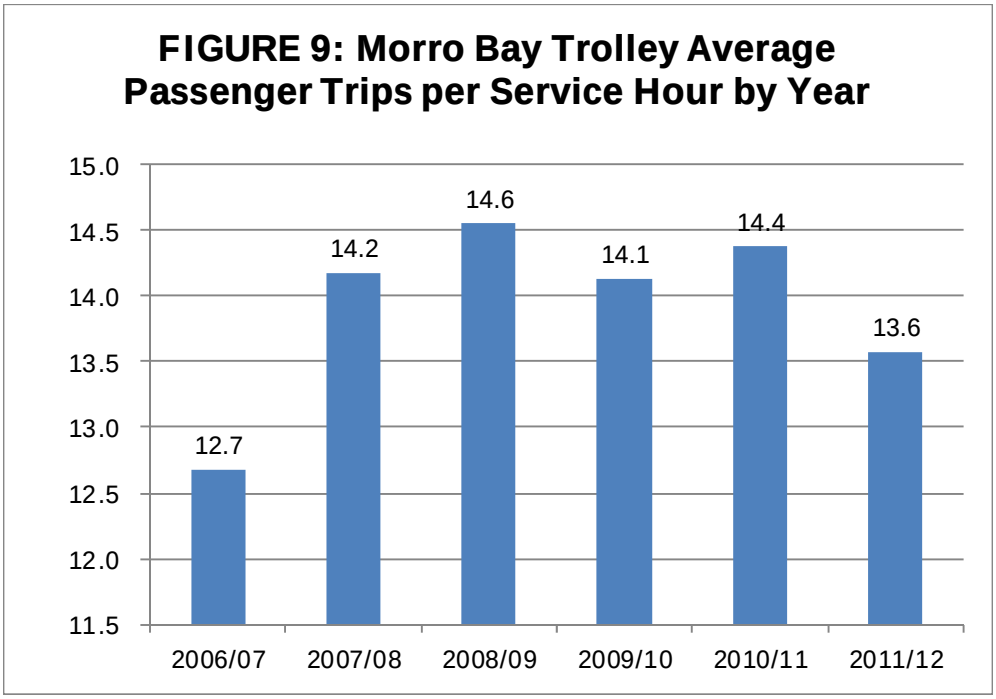
- **Operating cost per passenger-trip** is shown in Table 7, though it should be restated that the cost allocation was adjusted in 2011-12, increasing the cost. The operating cost per passenger trip varied from a high of $3.91 in 2011-12 (it would be $3.01 if costs were not reallocated) and $2.82 in 2007-08, to a low of $2.55 in 2006-07.

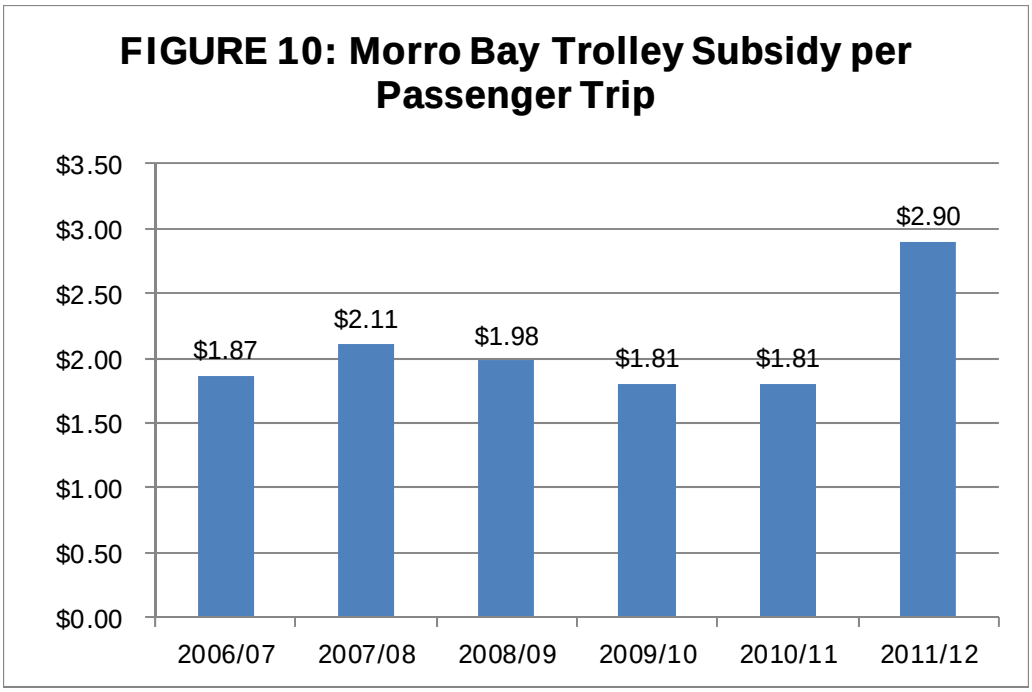
- The **subsidy per passenger-trip** is shown in Figure 10. The highest subsidy was in 2011-12 at $2.90 (due to the reallocation formula—otherwise it would have been calculated at $2.00), followed by 2007-08, when the subsidy per passenger trip was $2.11. The lowest subsidies per passenger trip were in 2009-10 and 2010-11 at $1.81.

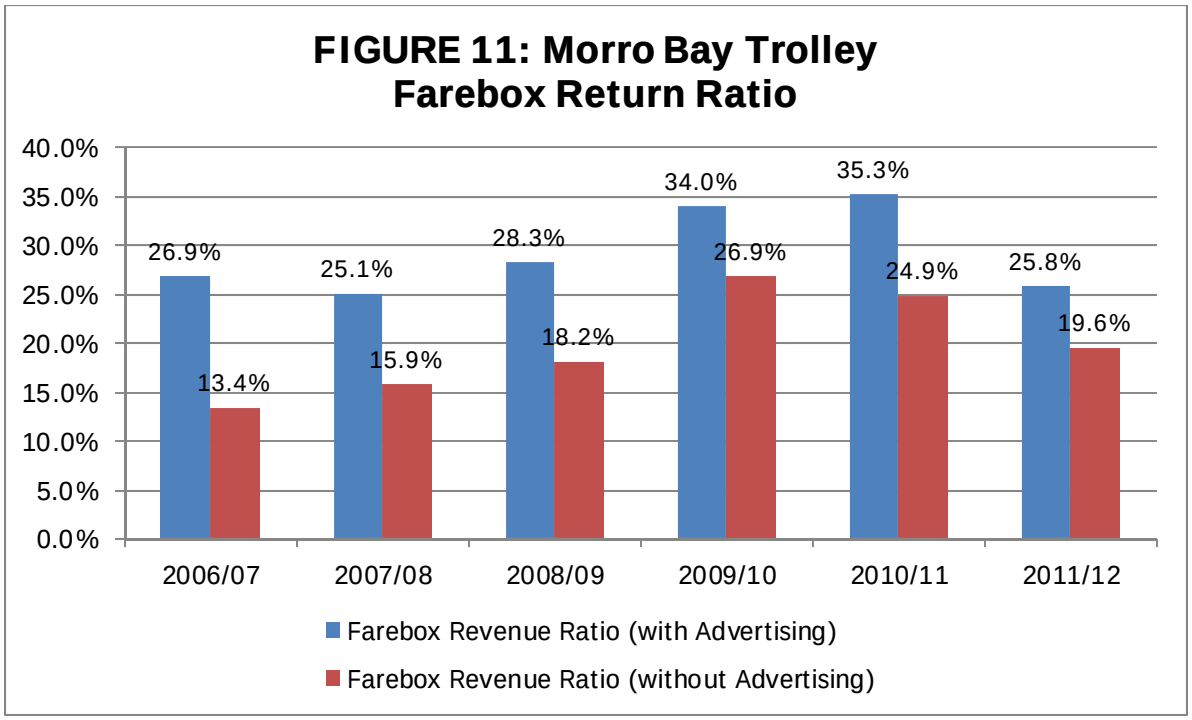
- The **farebox ratio** is relatively strong for the Trolley due to advertising revenues which contribute to fare revenue. Table 7 shows the farebox ratio with advertising revenues, and Figure 11 shows the farebox ratio both with and without the advertising revenue. The proportion of true farebox revenue in relation to advertising revenue has steadily increased over the years. The farebox ratio was lowest in 2006-07 (13.4 percent without advertising revenue) and highest in 2009-10 and 2010-11 (26.9 and 24.9 respectively, without advertising revenue). The

farebox revenue decreases in 2011-12 to 25.8 percent with advertising revenue, or 19.6 percent without advertising revenue. Nonetheless, farebox revenue remains relatively strong.

- Finally, Table 7 shows the number of **passenger-trips per service-miles**, which ranged from a low of 1.2 (in 2006-07) to a high of 1.5 in 2010-11.







PREVIOUS SURVEYS

Morro Bay Transit Mail and Online Survey, April / May 2011

Surveys were conducted in April and May of 2011, with 92 surveys returned: 71 by mail and 23 online. Highlights of the findings are below.

- Asked if they use Morro Bay Transit Fixed Route, 70 percent said no, and 20 percent said yes. Further, only 23 percent of the respondents said they use Morro Bay Transit Call-A-Ride.

- Asked why they do not use transit, the respondents answered:
  - Use own car (39 percent)
  - Walk (8 percent)
  - Don't need services (8 percent)
  - Too expensive (8 percent)
  - Cannot get to fixed route stops (8 percent)
  - Wait time (3 percent)

- For those who use the services, asked how they would have made the trip without transit, respondents answered:
  - Would not have made trip (24 percent)
  - Would be driven by someone else (23 percent)
  - Would drive myself (18 percent)

  - Walk (16 percent)
  - Bike (8 percent)
  - Use Runabout or Ride-On service (4 percent)
  - Taxi (3 percent)
  - Other (3 percent)

- Those who use the service do so for the following purposes:
  - Medical or dental appointment (26 percent)
  - Shopping (22 percent)
  - Recreation or social activity (15 percent)
  - Connect with regional fixed route 12 (12 percent)
  - Library (12 percent)
  - Other (7 percent)
  - Work (6 percent)
  - School (1 percent)

- Asked how they felt about the fixed route regular fare ($1.25), 67 percent said it was "just right," 23 percent said it was "high" and 10 percent said it was "low."

- Asked how they felt about the fixed route discounted fare ($0.60), 69 percent said it was "just right," 27 percent said it was "high" and 4 percent said it was "low."

- Asked how they felt about the Call-a-Ride fare ($2.50), 56 percent said it was "just right," 37 percent said it was "high" and 8 percent said it was "low."

- Respondents were asked what is it that they like best and least about the current Fixed Route and Call-A-ride service, giving the following answers:
  - Best
    - Availability
    - Drivers
    - Fixed Route
    - Convenient
  - Least
    - Route Stops (not located where desired)
    - Advanced reservations required
    - Price
    - Takes too long
    - Route frequency

Trolley Survey, Summer 2010

A survey was conducted on the Morro Bay Trolley from July to October, 2010. A total of 74 surveys were returned, which was less than half a percent of the ridership during this period. The survey was brief, with the following highlighted findings:

- The majority of survey respondents were from California (83 percent); 14 percent were from Morro Bay and 7 percent were from San Luis Obispo.
- Asked how they felt about the fare, 56 percent said it was "just right," 26 percent said it was "high" and 8 percent said it was "low."
- Asked if there were locations in Morro Bay where the trolley should serve, most respondents said they did not know or that the service was fine. A few individuals suggested Albertson's and Bob's Big Boy, and other individually listed locations included the Liquor Store, Museum of Natural History, Embarcadero, Spencer, San Luis Obispo, Virg's, Morro Strand, Hearst Castle and Cayucos.
- Most survey respondents were in town to shop (25 percent), dine (22 percent), go to the beach (20 percent), and stay in a hotel (13 percent) or camp (8 percent).

TRANSIT CAPITAL ASSETS

Fleet

All transit vehicles are owned by the City of Morro Bay, and leased to MV Transportation for operation. Currently, Morro Bay Transit has two 14-passenger vehicles with two wheel chair tie-downs and three trollies, as shown in Table 8. All vehicles are gasoline fueled.

TABLE 8: Morro Bay Vehicle Fleet

Model Year	Type	Seating Capacity	Wheel Chairs	Fuel Type	Service Used For…
2008	Ford E-450	14	2	Gasoline	Deviated Fixed Route
2010	Ford E-450	14	2	Gasoline	Deviated Fixed Route
2003	Ford F-53	34	2	Gasoline	Trolley
2009	Ford F-53	30	2	Gasoline	Trolley
2010	Ford F-53	30	2	Gasoline	Trolley

Source: Morro Bay Transit

Equipment and Facilities

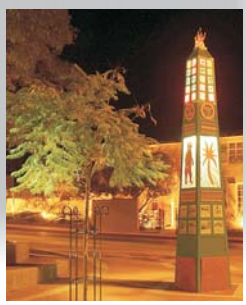
The contract between the City of Morro Bay and MV Transportation specifies division of responsibilities for operation and maintenance of both the Fixed Route/Call-A-Ride and Trolley services. The City assumes the responsibility for vehicle maintenance and repairs; however, in practice, MV Transportation cleans the vehicles. Vehicles are housed at the City's maintenance yard, where they are fueled. The City provides utilities, such as telephones and radio, for MV Transportation.

Bus Stops and Bus Shelters

Morro Bay Transit has minimal passenger amenities. Each stop includes a bus stop sign. The transfer center at Morro Bay Park has a shelter with several benches.

NORTH COAST TRANSIT SURVEYS 2013

Technical Memorandum Two:
Survey Results



Prepared for the

San Luis Obispo Council of Governments

Prepared by

LSC Transportation Consultants, Inc.

North Coast Transit Surveys 2013

Technical Memorandum 2: Survey Results

Prepared for the

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Chapter 1
Introduction

The San Luis Obispo Council of Governments (SLOCOG), using funding from a Transit Technical Assistance Grant provided by the California Department of Transportation (Caltrans), retained LSC Transportation Consultants, Inc. to conduct a Transit Ridership Survey for fixed route transit services serving the North Coast of San Luis Obispo County. These services include Morro Bay Transit and selected routes on San Luis Obispo Regional Transit Authority (RTA). This Technical Memorandum Two presents the results of these surveys, conducted in the spring and summer of 2013. It builds on the review of existing services presented previous in Technical Memorandum One. After review, the materials in the two technical memoranda will be used to prepare a final study report.

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Chapter 2
Survey Methodology

PLANNING THE SURVEYS

Planning the surveys was initiated at a meeting between San Luis Obispo Council of Governments (SLOCOG) staff, SLORTA staff, the City of Morro Bay staff County Transit Authority staff and the consultant. After discussing the issues relevant to the study, a schedule was identified for the survey process, outreach and report development. Surveyor hiring and training were also discussed at the kick-off meeting. Additionally, the group discussed survey methodology and expected outcome and reviewed preliminary survey instruments in detail to ensure the questions were designed to generate valid results and to optimize formatting of the survey. The finalized survey instruments are provided in Appendices A and B.

SURVEYOR HIRING AND TRAINING

Surveyors were hired both through an employment agency located in San Luis Obispo, as well as through a pool of interns contracted through SLOCOG. Employees were trained by LSC staff prior to their initial shifts. Training consisted of discussing the survey purpose, reviewing survey instruments and materials required for the survey, and discussing expected behavior and conduct for administering the survey. Written survey instructions were provided to each of the surveyors. Surveyors practiced role-playing to simulate the survey process. The Consultant met with surveyors early during their first shifts and frequently throughout the survey to ensure surveyors were correctly following procedures and to answer any questions regarding conduct of the survey. Transit drivers provided helpful assistance by familiarizing surveyors with the routes and by conveying issues and conditions that the drivers often observe.

SURVEY METHODOLOGY

In order to survey each of the runs of each North Coast RTA local fixed routes (Routes 12, 14 and 15) and the Morro Bay Transit route, spring surveys were conducted on weekdays between April 23 and May 2, 2013. Surveys included onboard opinion surveys, boarding and alighting surveys, on-time performance surveys, and transfer surveys. Additionally, outreach surveys were conducted at the Cuesta College campus.

A second survey effort was conducted on the Morro Bay Trolleys in the summer, specifically on July 12 and 13, 2013. The trolleys are tourist-oriented and only operate during the summer months. Boarding and alighting counts were conducted on July 12 on all three trolley routes from 11:00 AM to 3:00 PM and on July 13 from 3:00 to 7:00 PM. Opinion surveys were conducted on July 12 from 3:00 to 7:00 PM, and on July 13 from 11:00 AM to 3:00 PM. This allowed the surveyors to conduct both types of surveys at all times of the day on all routes for an equivalent of one service day.

Onboard Passenger Surveys

Surveys were designed to collect information on passenger trip patterns, passenger demographics, and passenger opinions regarding services. The survey was printed in English on one side and Spanish on the reverse side. A trained surveyor distributed the self-administered surveys to every boarding passenger who appeared over the age of 12. Several of the surveyors were bilingual, and these surveyors were placed on routes known to carry a greater preponderance of Spanish speaking passengers. The surveyors were generally available to assist riders in completing the survey forms and were instructed to help disabled passengers in particular. Survey forms were provided on card stock so that a lap was a sufficient surface, and pencils were supplied to passengers completing forms. Completed survey forms were returned to the surveyors or placed in a hanging folder in the vehicle. Surveyors were instructed to collect all survey forms at the end of each run and place them in a pre-labeled envelope, with one envelope provided for each run.

Boarding and Alighting and On-Time Performance Surveys

Boarding and alighting surveys and on-time performance surveys were conducted separately from the opinion surveys. Surveyors were provided with forms listing all scheduled stops in order, with a column for surveyors to write the number of passengers boarding and alighting. The scheduled time at time-check stops (stops which have a posted time in the printed schedule) were also provided with a box for surveyors to complete by writing in the actual time of departure from the stop. For Morro Bay Transit, blank lines were included for recording boardings and alightings at flag stops. The data was recorded for the equivalent of each run of each route over a weekday on RTA routes 12, 14 and 15 and Morro Bay Transit. As the Morro Bay trolleys are operated on a loose schedule, on-time performance was not tracked.

Transfer Surveys

Transfer data was collected by two methods. The boarding and alighting forms included rows at transfer points for the surveyors to record passengers coming from another route (by a show of hands). This occurred at City Park in Morro Bay, and was included on boarding and alighting forms for Morro Bay Transit, RTA Route 12 and RTA Route 15, as well as at Market Street and Morro Bay Boulevard for trolley routes. Additionally, surveyors were stationed at the main SLO Transit and RTA transfer stop in San Luis Obispo (at the intersection of Osos Street and Palm Street) to ask passengers if they had transferred from another service. Using survey forms developed by the Consultant, surveyors boarded each SLO Transit and RTA bus over eight hours and asked passengers to indicate by a show of hands how many had transferred from a specified route.

Intercept Surveys

An intercept survey was conducted at Cuesta College with the intent of asking passers-by (generally students and faculty) if they were current transit users; if so, were they satisfied with transit or could they suggest improvements; and if not, could transit be changed to allow or encourage them to use the services. Surveyors (LSC staff and SLOCOG staff) were stationed at the two highest pedestrian traffic areas on campus on different days of the week (a Wednesday and Thursday, to reach students with differing schedules) for a total of eight hours.

Survey data collected using these survey methodologies are presented in the following chapters.

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Chapter 3
Spring Onboard Passenger Survey Results For North Coast Fixed Routes

SURVEY COVERAGE AND RESPONSE RATE

Onboard passenger surveys were conducted on the North Coast fixed routes over six service weekdays (April 23 to 25, 2013 and April 30 to May 2, 2013). Surveys were conducted mid-week to avoid potential ridership anomalies on Mondays or Fridays. The equivalent of each run of each route was surveyed.

Table 1 presents the response rate of each route based on the total ridership during the survey efforts. Actual ridership data was available for dates the Morro Bay Transit and RTA Route 15 were surveyed, and ridership on Routes 12 and 14 were estimated based on average daily ridership during the surveyed days (as these routes were surveyed over multiple days). As indicated, response rates varied from an estimated 32.8 percent on Route 12 and 34.2 percent on Morro Bay Transit, to 48.4 percent on Route 14 and 51.2 percent on RTA Route 15. This represents a good response rate for survey validity.

Spanish Surveys

As also shown in Table 1, in total, 14 surveys (3.0 percent) were completed in Spanish. Route 15 had the highest percentage of Spanish surveys, with 4 surveys (9.0 percent), followed by Morro Bay Transit, which had 2 surveys (7.0 percent) completed in Spanish.

RTA ROUTE 12, 14 AND 15 ONBOARD PASSENGER SURVEY RESULTS

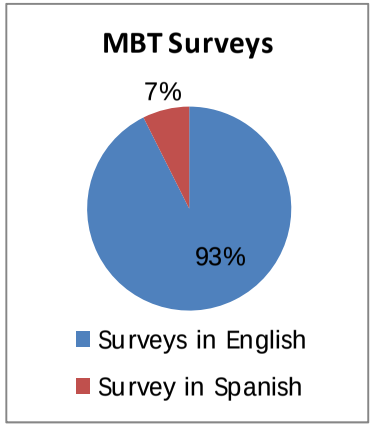
The following provides a summary of survey results for the RTA North Coast routes, including Routes 12, 14 and 15. These are summarized in order of questions on the survey form (see Appendix A for survey instruments). The answers are also summarized in Tables 2 and 3 (combined), and individually by route in Appendix A.

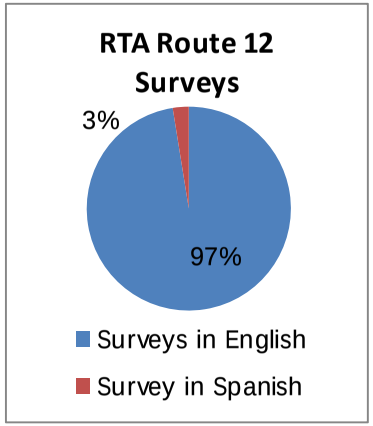
Q1. What time did you board this bus?

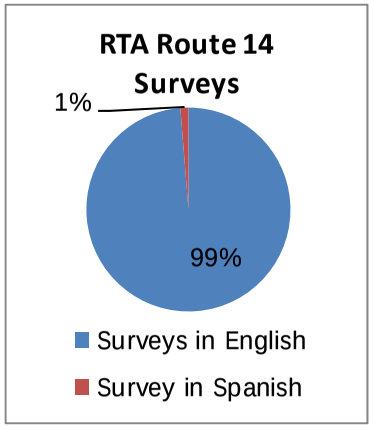
Respondents boarded the bus throughout the day, but the busiest survey response time was in the morning from 8:00 AM to 10:00 AM. The time respondents boarded the bus is shown in Figure 1.

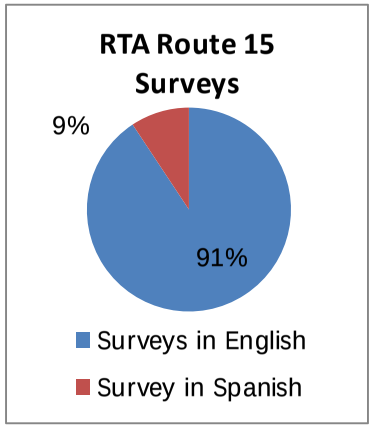
TABLE 1: North Coast Surveys Response Rate

Opinion Surveys	Service Surveyed				
	Morro Bay Transit	Route 12	Route 14	Route 15	Total
Number of Survey Responses	27	277	78	43	425
Total Ridership During Survey [1]	79	845	161	84	1,169
Estimated Individual Passengers [2]	45	483	92	56	676
Total Response Rate	34.2%	32.8%	48.4%	51.2%	36.4%
Estimated Response of Individuals	57.1%	57.1%	57.1%	66.7%	57.8%









Note 1: Actual for Morro Bay Transit (April 23); RTA Route 15 (April 24): RTA Routes 12 and 14 based on average daily ridership from April 23, 24 and 25 and May 3, 2013.
Note 2: Estimated based on transfer rates, pass sales, etc.
Source: LSC Transportation Consultants.

TABLE 2: Responses for RTA Onboard Surveys
Questions 1 to 8

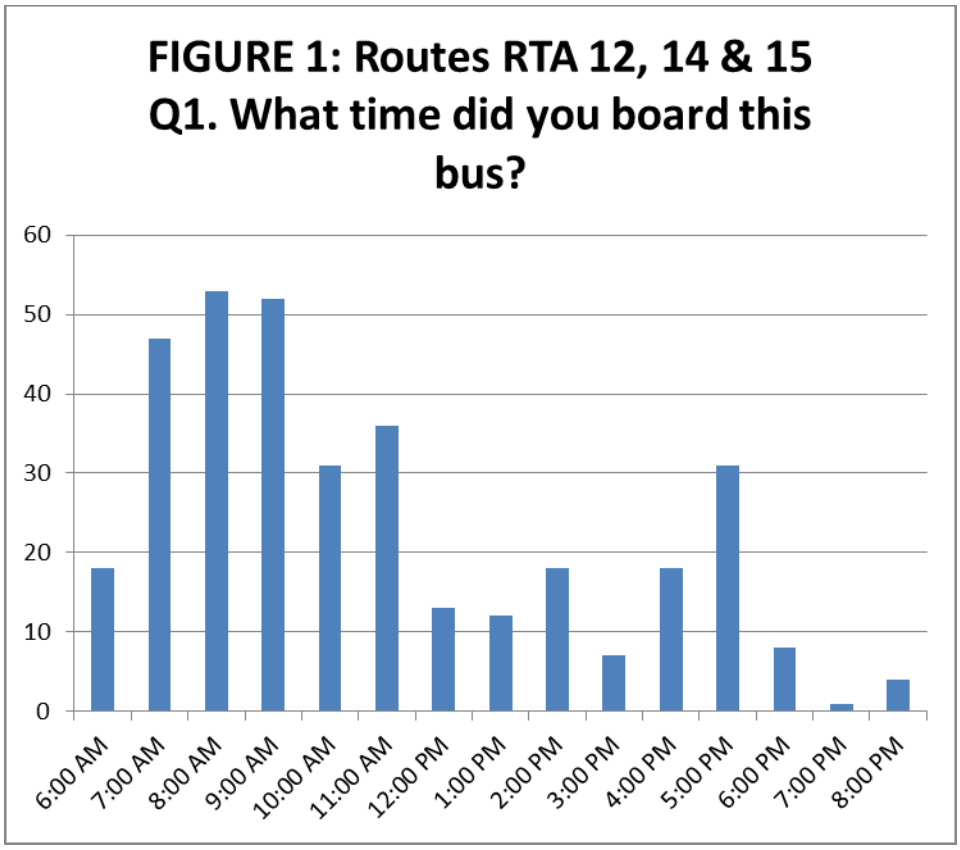
Questions	Answers								
Q1. What time did you board the bus?	**6-7 AM**	**7-8 AM**	**8-9 AM**	**9-10 AM**	**10-11 AM**	**11 AM - 12 PM**	**12-1 PM**	**1-2 PM**	**2-3 PM**
Number of Respondents	18	47	53	52	31	36	13	12	18
Percent of Respondents	5%	14%	15%	15%	9%	10%	4%	3%	5%
	3-4 PM	**4-5 PM**	**5-6 PM**	**6-7 PM**	**AM**	**PM**	**SUM**		
Number of Respondents	7	18	31	8	98	18	344		
Percent of Respondents	2%	5%	9%	2%	28%	5%			
Q3. Where did you just come from?	**School/College**		**Work**		**Shopping**		**Medical/Dental**		
Number of Responses	69		53		7		5		
Percent of Responses	18%		14%		2%		1%		
	Rec/Social		**Home**		**Personal**		**Other**		**SUM**
Number of Respondents	15		220		18		3		**390**
Percent of Respondents	4%		56%		5%		1%		
Q5. How did you get to the bus?	**Transferred**		**Walked**		**Biked**		**Drove Alone**		
Number of Responses	102		185		59		2		
Percent of Responses	26%		48%		15%		1%		
	Dropped off		**Other**		**SUM**				
Number of Respondents	30		7		**385**				
Percent of Respondents	8%		2%						
Q5. If transferred, from which route?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**		
Number of Responses	16	23	19	3	12	25	7		
Percent of Responses	13%	19%	16%	2%	10%	20%	6%		
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SUM**		
Number of Respondents	4	1	6	1	4	1	122		
Percent of Respondents	3%	1%	5%	1%	3%	1%			
Q7. How will you complete your trip?	**Transfer**		**Walk**		**Bicycle**		**Drive Alone**		
Number of Responses	110		184		55		2		
Percent of Responses	28%		48%		14%		1%		
	Get Dropped Off		**Other**		**SUM**				
Number of Respondents	29		6		**386**				
Percent of Respondents	8%		2%						
Q7. To which route will you transfer?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**		
Number of Responses	12	11	20	6	14	14	3		
Percent of Responses	10%	9%	16%	5%	11%	11%	2%		
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SUM**		
Number of Respondents	0	0	10	1	0	1	92		
Percent of Respondents	0%	0%	8%	1%	0%	1%			
Q8. Where are you going now?	**School/College**		**Work**		**Home**		**Shopping**		
Number of Responses	143		78		108		8		
Percent of Responses	37%		20%		28%		2%		
	Medical/Dental		**Rec/Social**		**Personal**		**Other**		**SUM**
Number of Respondents	9		13		21		7		**387**
Percent of Respondents	2%		3%		5%		2%		

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.

TABLE 3: Responses for RTA Onboard Surveys
Questions 10 to 20

Questions	Answers								
Q10. How often do you ride the bus?	**Daily**		**2-4 days/week**		**1 day/week**		**1-4 days/mo**		
Number of Respondents	188		158		8		19		
Percent of Respondents	49%		41%		2%		5%		
	< 1 day/mo		**First Time**		**SUM**				
Number of Respondents	9		4		386				
Percent of Respondents	2%		1%						
Q11. Do you use other transit services?				**Yes**	**No**	**SUM**			
Number of Respondents				238	144	**382**			
Percent of Respondents				62%	38%				
Q11. If so, which ones?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**	**DAR**	
Number of Responses	43	53	55	24	19	12	28	4	
Percent of Responses	10%	12%	13%	6%	4%	3%	6%	1%	
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SLO**	**Other**	**SUM**
Number of Respondents	15	24	38	41	38	20	11	9	434
Percent of Respondents	3%	6%	9%	9%	9%	5%	3%	2%	
Q12. Car available for trip?	**Yes**	**No**	**SUM**	**Q14. Have driver's license?**			**Yes**	**No**	**SUM**
Number of Respondents	135	245	**380**	Number of Respondents			235	145	**380**
Percent of Respondents	36%	64%		Percent of Respondents			62%	38%	
Q13. How else would you make trip?	**Get a Ride**		**Drive my car**		**Taxi**		**Walk**		
Number of Responses	165		83		13		21		
Percent of Responses	36%		18%		3%		5%		
	Bike		**No trip**		**Other**		**SUM**		
Numer of Respondents	54		110		11		**457**		
Percent of Respondents	12%		24%		2%				
Q15. Use WC lift?	**Yes**	**No**	**SUM**	**Q17: College student?**			**Yes**	**No**	**SUM**
Number of Respondents	1	379	**380**	Number of Respondents			182	173	**355**
Percent of Respondents	0%	100%		Percent of Respondents			51%	49%	
Q16. Age group?	**< 12**	**13-18**	**19-24**	**25-61**	**62-74**	**75+**	**SUM**		
Number of Respondents	1	49	152	158	26	0	**386**		
Percent of Respondents	0%	13%	39%	41%	7%	0%			
Q18. Opinion of Service?	**1**	**2**	**3**	**4**	**5**	**Average**			
Frequency	6	29	97	126	116	3.8			
On-time	8	12	44	137	180	4.2			
Fares	9	30	133	108	97	3.7			
Comfort	3	17	107	137	114	3.9			
Courtesy of Drivers	6	13	53	109	198	4.3			
Start Time	5	14	77	133	141	4.1			
End Time	15	26	95	126	107	3.8			
System Safety	2	10	50	145	159	4.2			
Convenience of Stops	6	27	90	133	120	3.9			
Convenience of Transfers	8	19	63	127	130	4.0			
Cleanliness	6	12	64	146	148	4.1			
Stops and Shelters	14	32	102	125	97	3.7			
Q19. Overall Ranking?	**Poor**		**Fair**		**Good**		**Excellent**		**SUM**
Number of Respondents	4		43		201		119		**367**
Percent of Respondents	1%		12%		55%		32%		
Q20: Service Improvements?	**Frequency**		**New/Extended**		**Earlier Weekday**		**Later Weekday**		
Number of Responses	172		61		33		77		
Percent of Responses	37%		13%		7%		16%		
	Earlier Saturday		**Later Saturday**		**SUM**				
Numer of Respondents	48		79		**470**				
Percent of Respondents	10%		17%						

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.



Q2. Where did you get on this bus?

Respondents were asked to list their boarding locations by listing either a bus stop or nearby intersection. The transfer centers at Osos and Palm Streets in San Luis Obispo and at Morro Bay Park had the most boardings (90 and 52 respectively), followed by Cuesta College and Santa Rosa and Foothills, as shown in Table 4.

Q3. Where did you just come from? Q8. Where are you going now?

These two questions were asked to determine the primary reasons passengers use the transit services. Subtracting responses that listed “home,” the combined results of these two questions give a good indication of trip purpose. Results were significantly different for the three routes, and are therefore summarized individually by route.

On Route 12, just over a third of passengers were using the service for school or college (38.7 percent) or for work (35.1 percent), as shown in Figure 2. Another 10.2 percent were using the service for personal reasons (i.e. errands, visiting someone, etcetera) and 7.5 percent were using it for recreational or social purposes. Just fewer than 4 percent were using it for medical or dental trips, or shopping.

TABLE 4: Onboard Survey Boarding Locations

Route 12

Place/Description	Street	Cross Street	# of Responses
SLO Transit Center	Osos St	Palm St	90
Morro Bay Park			52
Cuesta College			33
Kennedy Library Cal Poly	Santa Rosa St	Foothill Blvd	22
10th & LOVR	10th St	LOVR	14
Pine & LOVR	Pine St	LOVR	7
11th & Ramona	11th St	Ramona Ave	4
Baywood Elementary School	11th	El Moro	4
Los Osos Post Office	LOVR	Sunset Dr	4
Quintana & South Bay Blvd	Quintana Rd	South Bay Blvd	4
Pine & Loma	Pine St	Loma St	3
Ralphs Market	LOVR	South Bay Blvd	3
Others			26
Total Responses			266

Route 14

Place/Description	Street	Cross Street	# of Responses
Kennedy Library Cal Poly	Santa Rosa St	Foothill Blvd	43
SLO Transit Center	Osos St	Palm St	21
Cuesta College	Hwy 1	Education Dr	11
Others			0
Total Responses			75

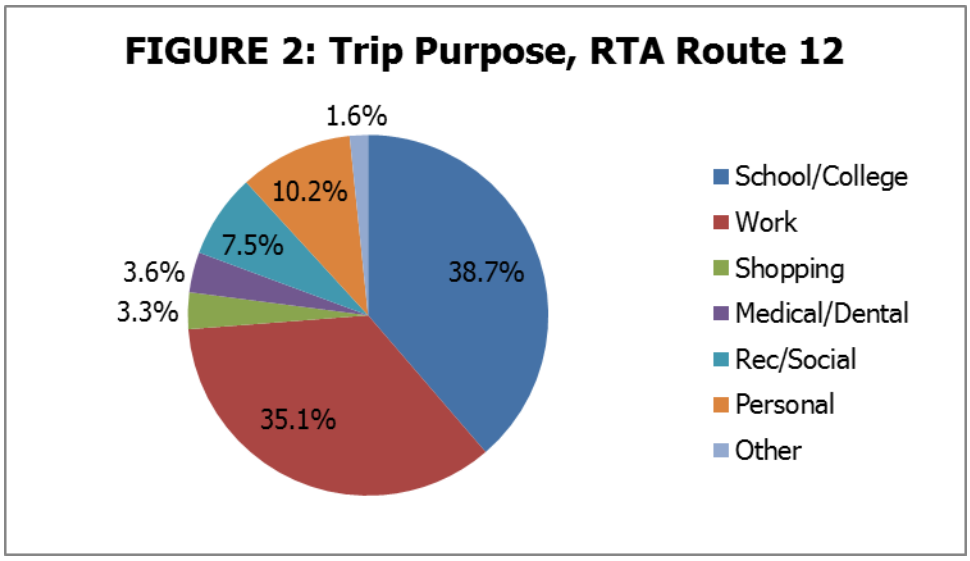
Route 15

Place/Description	Street	Cross Street	# of Responses
Morro Bay Park			8
Main & Burton	Main St	Burton St	6
Burton & Main	Burton Dr	Main St	3
San Simeon			3
Ardath & Green St	Ardath Dr	Green St	2
Cayucos			2
SLO Transit Center	Osos St	Palm St	2
Others			15
Total Responses			21

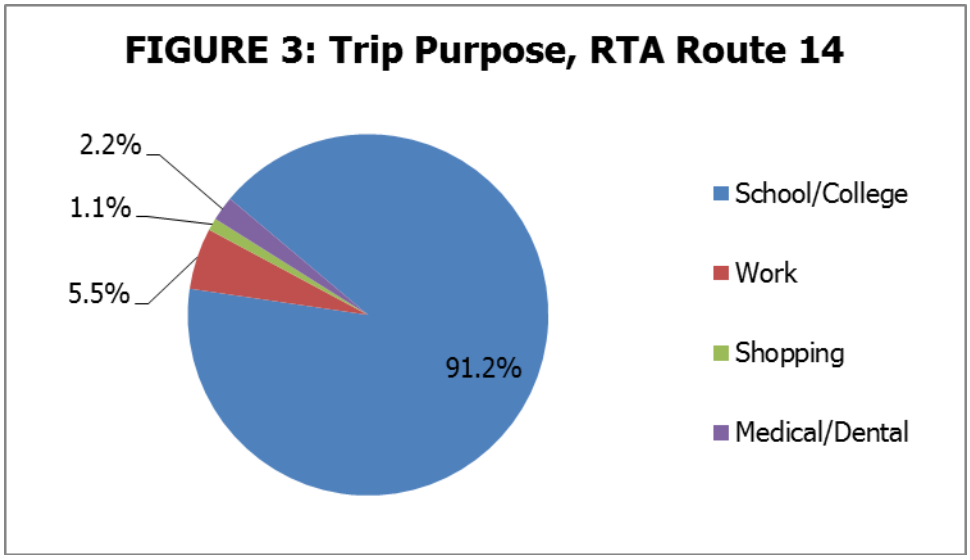
Top 5: All Routes

Place/Description	Street	Cross Street	# of Responses
SLO Transit Center	Osos St	Palm St	111
Morro Bay Park			60
Santa Rosa & Foothill Blvd	Santa Rosa St	Foothill Blvd	59
Cuesta College			44
10th & LOVR	10th St	LOVR	14
Pine & LOVR	Pine St	LOVR	7
Main & Burton	Main St	Burton St	6

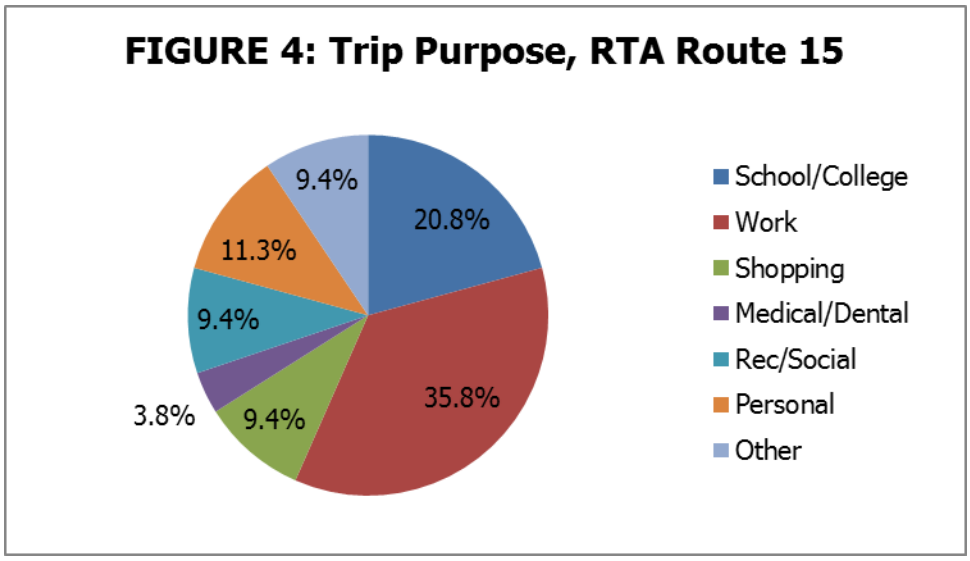
Source: Data collected from Question 2 of survey; April 23 to May 5, 2013. LSC Transportation Consultants, Inc.



The large majority of passengers use Route 14 for school or college (91.2 percent), with much smaller numbers using it for work (5.5 percent), medical or dental appointments (2.2 percent) or shopping (1.1 percent) as shown in Figure 3.



Responses on Route 15 are more typical of a rural fixed route. While a significant number still use the service for school or college (20.8 percent), over a third of passengers were using the service for work (35.8 percent), as shown in Figure 4. Another 11.3 percent were using the service for personal reasons, and 9.4 percent were using it for recreation/social purposes, shopping and other purposes. Only 3.8 percent were using it for medical or dental trips.



Q4. Where is the location of where you came from?

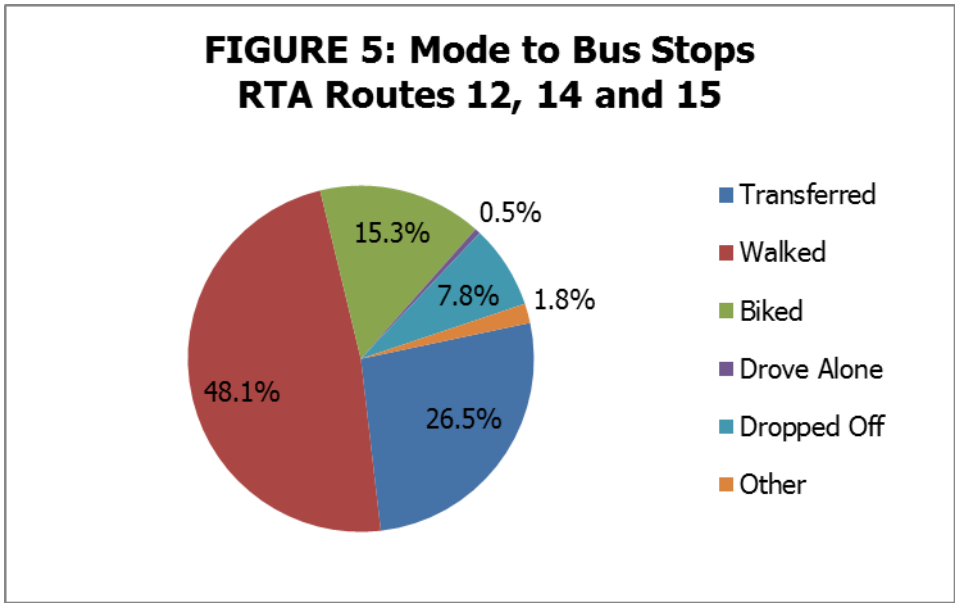
Passengers were asked to list where they just came from, to provide an indication of where passengers need service and how close their trip originations are to current bus stops. The detailed results are listed in Appendix A, and summarized by community in Table 5. As indicated, 46 percent said they were coming from San Luis Obispo, and 17 percent were coming from Los Osos and 15 percent from Morro Bay. Additionally, 10 percent came from Cuesta College, and 13 percent of respondents were coming from other locations.

TABLE 5: Q4. Location Survey Respondents Came From

	RTA Route #				
Respondents stated they came from...	12	14	15	Total #	Total %
Arroyo Grande	1	1		2	1%
Atascadero	4	6		10	4%
Cambria	4		3	7	3%
Cayucos	2		1	3	1%
Cuesta	26			26	10%
Los Osos	41	1	3	45	17%
Morro Bay	38		2	40	15%
Nipomo	1			1	0%
Paso Robles	4			4	1%
Oceano	2			2	1%
Santa Maria	4			4	1%
SLO	80	43	2	125	46%
Templeton	2	1		3	1%
Total	209	52	11	272	100%

Q5. How did you get to the bus today?

When asked how they got to the bus stop, nearly half (48 percent) said they walked, followed by the transfers (26 percent), and bikes (15 percent), as shown in Figure 5. Less than half a percent drove alone to the bus stop, and 7.8 percent were dropped off.



Of those who transferred, the highest frequency of transfers was from Routes 9 and 10 to Route 12, or from RTA routes in general (nearly 20 percent of respondents marked RTA without specifying a route), as shown in Table 6. Additionally, almost 15 percent of respondents indicated they had come from SLO Transit routes, with the highest frequency of transfers coming from SLO Route 3.

TABLE 6: Q5. Routes Passengers Transferred From

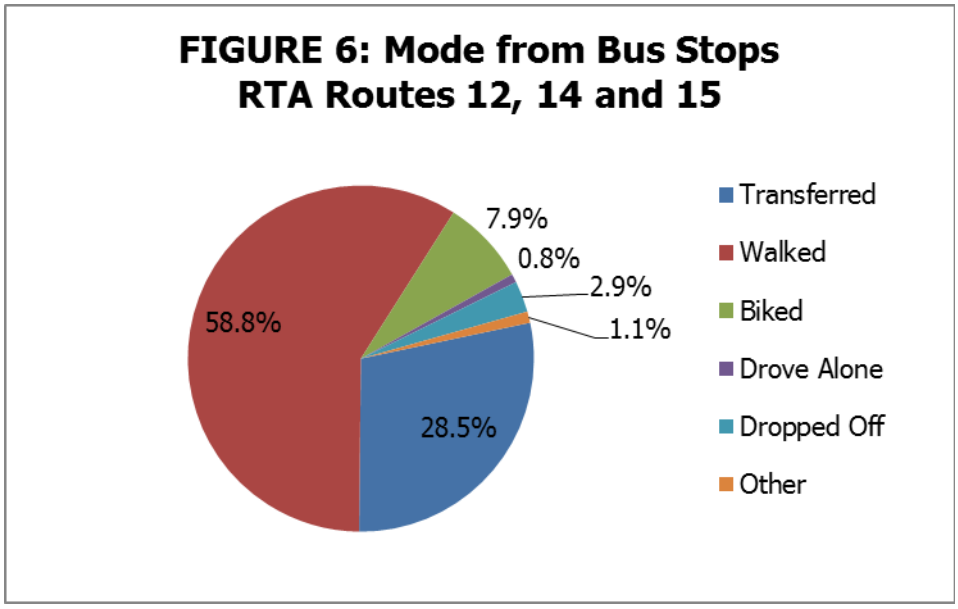
	Transferred to...			
Transferred From...	RTA 12	RTA 14	RTA 15	All
RTA 9	14	2	0	16
RTA 10	21	2	0	23
RTA 12	9	3	7	19
RTA 14	3	0	0	3
RTA 15	6	0	3	9
RTA General	19	6	0	25
MBT	6	0	1	7
SLO 1	2	2	0	4
SLO 2	1	0	0	1
SLO 3	4	2	0	6
SLO 4	0	1	0	1
SLO 5	3	1	0	4
SLO 6	1	0	0	1
TOTAL	89	19	11	119

Q6. Where will you get off this bus?

Respondents were asked to list their alighting location (where they got off the bus) by listing either a bus stop or nearby intersection. Cuesta College had the most alightings (73 on Route 12 and 61 on Route 14), followed by the transfer centers at Osos and Palm Streets in San Luis Obispo and at Morro Bay Park and the Cal Poly Kennedy Library at Santa Rosa and Foothills, as shown in Table 7.

Q7. After you get off this bus, how will you complete your trip?

When asked how they got to the bus stop, more than half (58.8 percent) said they would walk, followed by those who said they would transfer (28.5 percent), as shown in Figure 6. While 15.3 percent said they biked to get to their stops, approximately half that amount (7.9 percent) said they would bike to complete their trips.



Of those who transferred to another route, the highest frequency of transfers was to RTA Route 12 (33.0 percent), and to unspecified RTA Routes (14.2 percent) and RTA Route 15 (13.2 percent). Only 11.3 percent were transferring to SLO Routes, and most of these were going to SLO Route 3. Less than 3 percent were transferring to Morro Bay Transit. This data is shown in Table 8.

TABLE 7: Onboard Survey Alighting Locations

Route 12

Place/Description	Street	Cross Street	# of Responses
Cuesta College			73
SLO Transit Center	Osos St	Palm St	68
Morro Bay Park			48
Kennedy Library	Santa Rosa St	Foothill Blvd	17
10th & LOVR	10th St	LOVR	8
Ralphs	LOVR	Fairchild Wy	6
El Moro & 11th	El Moro Ave	11th St	3
Pine Ave & Loma Street	Pine Ave	Loma St	3
Santa Ynez & 10th	Santa Ynez	10th St	3
Others			36
Total Responses			265

Route 14

Place/Description	Street	Cross Street	# of Responses
Cuesta College	Hwy 1	Education Dr	61
Kennedy Library Cal Poly	Santa Rosa St	Foothill Blvd	5
SLO Transit Center	Osos St	Palm St	4
Highway 1 & Kansas Ave	Hwy 1	Kansas Ave	3
Others			2
Total Responses			14

Route 15

Place/Description	Street	Cross Street	# of Responses
Morro Bay Park			3
SLO Transit Center	Osos St	Palm St	3
Burton & Main	Burton Dr	Main St	2
Cambria			2
Cayucos	Cayucos Drive		2
Cuesta College			2
Others			5
Total Responses			7

Source: Data collected from Question 2 of survey; April 23 to May 5, 2013. LSC Transportation Consultants, Inc.

TABLE 8: Q7. Routes Passengers Transferred To				
	Transferred from...			
Transferred To	RTA 12	RTA 14	RTA 15	All
RTA 9	10	0	0	10
RTA 10	7	3	1	11
RTA 12	20	8	7	35
RTA 14	3	3	0	6
RTA 15	8	0	6	14
RTA General	15	0	0	15
MBT	2	0	1	3
SLO 1	0	0	0	0
SLO 2	0	0	0	0
SLO 3	9	1	0	10
SLO 4	0	1	0	1
SLO 5	1	0	0	1
SLO 6	0	0	0	0
TOTAL	75	16	15	106

Q9. What is the location of where you are going now?

Similar to question 4, passengers were asked to list where they are going to get an indication of where passengers need service and how close their trip destinations are to current bus stops. The detailed results are listed in Appendix A, and summarized by community in Table 9, below. As indicated, 43 percent said they were going to Cuesta College, and 26 percent were going to San Luis Obispo. Additionally, 13 percent were going to Los Osos, and 11 percent were going to Morro Bay. Therefore, only 7 percent of respondents were going to other locations.

TABLE 9: Q9: What is the location of where you are going now?					
	Respondents on RTA Routes...				
				Total	
Respondents stated they are going to...	Route 12	Route 14	Route 15	#	%
Atascadero	3			3	1%
Cambria	5		6	11	4%
Cuesta College	70	56	4	130	43%
Los Osos	40			40	13%
Morro Bay	33		1	34	11%
Oceano	2			2	1%
San Simeon			1	1	0%
Santa Maria	1			1	0%
SLO	66	11	3	80	26%
Templeton	2			2	1%
Total	222	67	15	304	100%

Q10. How often do you ride the bus?

Passengers were asked how often they ride the bus. The responses varied by route, with the majority of riders (90 percent in all) using the services 2-5 days per week. RTA Route 14 had the highest number of daily riders (60 percent) followed by RTA Route 12 (46 percent) and then RTA Route 15 (36 percent), as shown in Figures 7 through 9.

FIGURE 7: RTA Route 12
Q10. How often do you ride the bus?

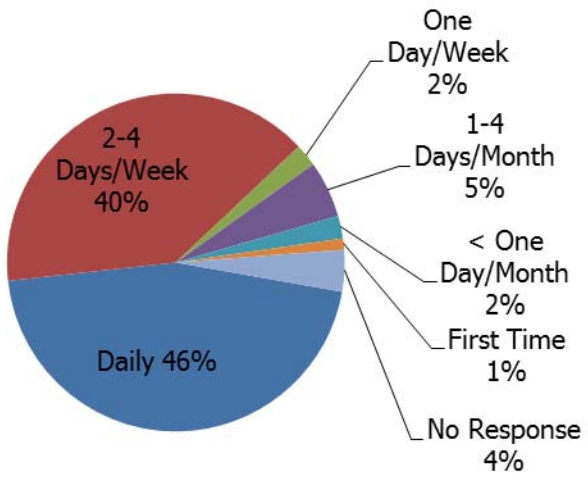
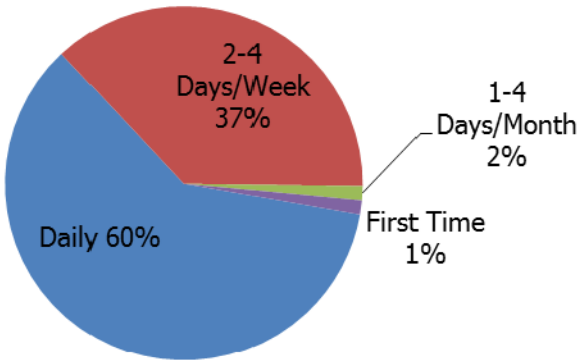
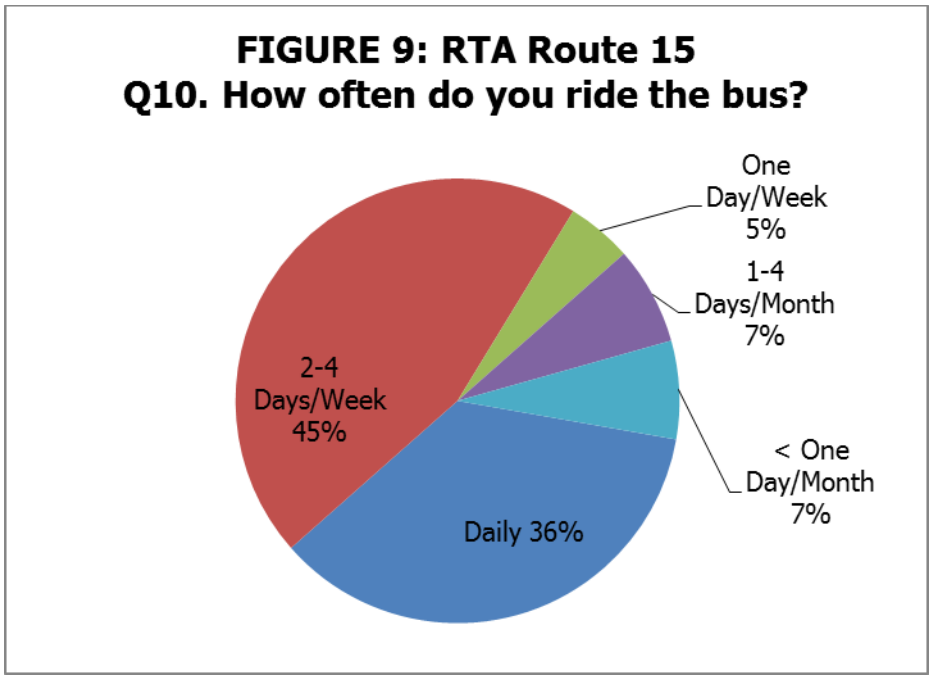


FIGURE 8: RTA Route 14
Q10. How often do you ride the bus?





Q11. Do you use other RTA services? If so, which ones?

Between 56 to 64 percent of passengers said they use multiple transit services in the region. As shown in Table 10 below, RTA Route 12 passengers tend to use most other RTA and SLO routes, while Route 14 passengers rely more heavily on RTA routes 10 and 12, as well as SLO Routes 3 and 4. RTA Route 15 passengers also tend to use RTA Route 12.

TABLE 10: Q11. Other Routes Passengers Use

Also use....	Passengers Surveyed on Route...			
	RTA 12	RTA 14	RTA 15	All
RTA 9	36	5	2	43
RTA 10	39	10	4	53
RTA 12	25	18	12	55
RTA 14	19	4	1	24
RTA 15	15	0	4	19
RTA General	11	0	1	12
MBT	25	1	2	28
SLO 1	10	5	0	15
SLO 2	15	6	3	24
SLO 3	25	7	6	38
SLO 4	26	13	2	41
SLO 5	28	10	0	38
SLO 6	14	6	0	20
SLO General	9	1	1	11
Dial-a-Ride	4	0	0	4
Others	8	1	0	9
Total	309	87	38	434

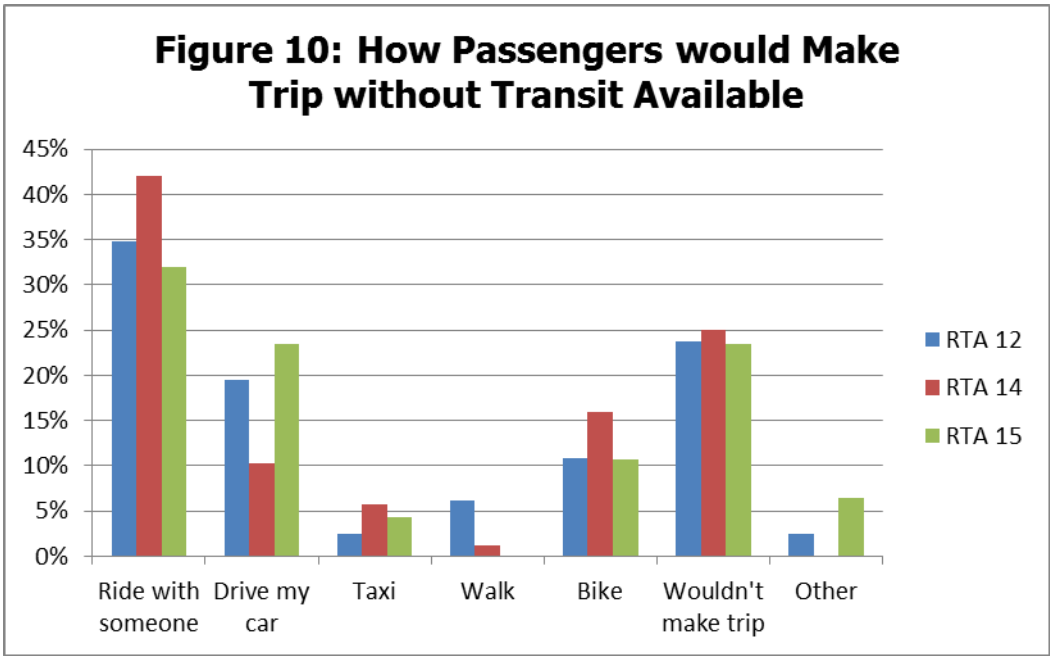
Q12. Did you have a vehicle available for this trip? Q14. Do you have a driver's license?

These two questions were designed to determine if passengers are using the transit service by choice or out of necessity. As shown in Table 3, 36 percent of survey respondents said they had a car available for the trip, while 64 percent did not. Additionally, approximately 62 percent said they had a drivers' license, but 38 percent did not. This would indicate approximately two-thirds of passengers using the transit system are doing so because they lack other means of transportation (either by necessity or by choice), while a third are using the service by choice.

Within the individual routes, RTA Route 14 had a higher percentage of individuals without a car available for the trip (75 percent), indicating a higher percentage of transit dependent passengers on this service.

Q13. How would you make the trip if RTA was not available?

If the RTA service were not available, passengers said they would get a ride with someone (32 to 42 percent), not make the trip (23 to 25 percent) drive a car (10 to 23 percent), or bike (11 to 16 percent). Only 1 to 9 percent said they would walk or use another mode of travel. Responses are shown in Figure 10. These responses indicate a moderate level of transit dependency by the survey respondents.



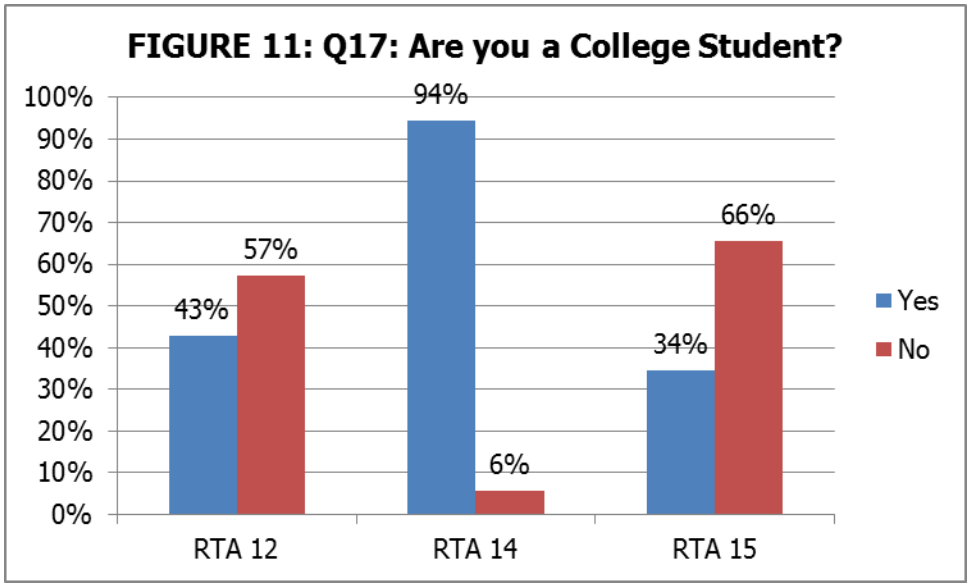
Q15. Did you require the wheelchair lift to board or exit this vehicle?

Only 1 out of 380 survey respondents said they boarded the vehicle in a wheelchair.

Q16. What is your age?

All three routes have a youthful ridership, reflective of the high student ridership. Only 7 percent of ridership was over the age of 61, and 39 percent of the ridership was between the ages of 19 and 24. On RTA Route 14, 68 percent of the ridership was between the ages of 19 and 24.

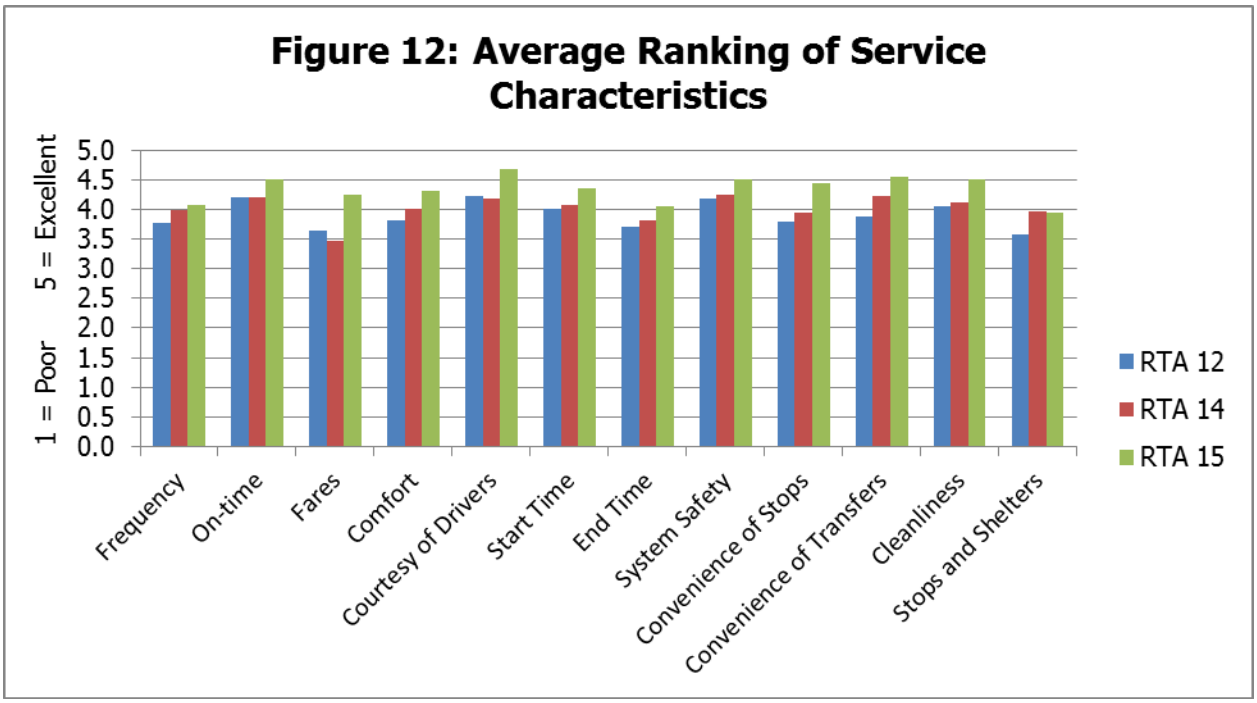
Q17. Are you a college student?



Overall, 51 percent of the passengers surveyed said they were college students. This varied by route, with 94 percent of RTA Route 14 passengers stating that they are students, and only 34 percent of RTA Route 15 respondents identifying themselves as college students, as shown in Figure 11.

Q18. Indicate your opinion of the RTA service from 1 to 5 using the list below. Q19. How do you rate the overall RTA Transit System?

Passengers were asked to rank service quality factors on a scale of one (1) to five (5), with one (1) being poor and five (5) being excellent. The average ranking was 3.9 for RTA Route 12, 4.0 for RTA Route 14, and 4.3 for RTA Route 15. Individual scores ranged from a low of 3.5 (for fares on RTA Route 14) to a high of 4.7 (for driver courtesy on RTA Route 15). The highest ranking factors overall were driver courtesy, on-time performance, system safety, cleanliness and convenience of transfers. The lowest ranking factors were stops and shelters, fares, service end time and service frequency.



Q20. What service or customer improvements would you like to see?

Passengers were asked to list specific improvements they would like to see by category. As shown in Table 11, the most common answer was for increased service frequency (33 percent of all responses). The next most common responses were for later Saturday or Weekday service, followed by new or extended routes. Additionally, 10 percent listed "other" which included comments about scheduling, shelter or bus stop improvements, requests for more bike racks, lower fares, routing suggestions, and improvements to vehicles, among a few others. Detailed responses are included in Appendix A.

TABLE 11: Q20. Suggested Improvements?

	Responses by RTA Route				
				All	
	Route 12	Route 14	Route 15	#	%
Increased Service Frequency	121	32	19	172	33%
Later Saturday Service	58	13	8	79	15%
Later Weekday Service	49	18	10	77	15%
New Or Extended Routes	46	10	5	61	12%
Other	45	3	7	55	10%
Earlier Saturday Service	42	3	3	48	9%
Earlier Weekday Service	28	4	1	33	6%
Total	389	83	53	525	100%

Q21. Other Comments

Question 21 asked passengers to list any additional comments. These comments have been summarized in Table 12 by subject matter, with compliments (in particular, praise for drivers) being the most frequent response, followed by comments about scheduling, and complaints about drivers, as well as suggestions for vehicle types or improvements. Detailed comments are included in Appendix A.

TABLE 12: Q21: Other Comments

Category	# of Responses
Compliment	36
Scheduling	11
Complaint: Drivers	7
Vehicles	7
Bike Racks	3
Fares	3
On-time	3
Complaint: Dispatchers	2
Extended Days/hours	2
Freqyency	2
Good as Is	2
Allow Drinks	1
Good Info from Drivers	1
More Stops	1
Routing	1
Safety	1
Shelter/Stop Improvements	1
Total	84

RTA ROUTE 12, 14 AND 15 SURVEY HIGHLIGHTS AND SUMMARY

The onboard passenger surveys conducted on the local fixed-route service for this study provide an overview on passenger characteristics and travel patterns, which are highlighted and summarized below:

- **Demographics** – On the RTA routes, 41 percent of the riders are adults aged 24 to 65, with 39 percent aged 19 to 24 and 13 percent are ages 12 to 18. Survey respondents are somewhat transit dependent due to a lack of car or drivers license, but over a third are “discretionary” transit users who have other modes of transportation available but choose transit.

- **Travel Patterns** –Nearly half of the passengers walk to the bus stop, but a large number transfer from other routes (26 percent) or bike (15 percent). The primary purpose of the trip is school or work. On Route 14 in particular, over 90 percent of respondents said they were using the bus to get to school (college). Nearly half of respondents ride the bus daily, and another 41 percent use it 2-4 times per week. While a third would get a ride if the service were not available, a quarter said they would not make the trip if transit were not available.

- **Customer Satisfaction** – Passengers generally rated the service as good (4.0 overall average on a scale of 1 to 5) but not excellent. The three top-ranked attributes ranking 4.2 to 4.3 were: (1) courtesy of drivers, (2 and 3 tied) system safety and on time performance. Lowest-ranking attributes (still ranked "good" overall at 3.7 to 3.8) consisted of the frequency of service, end time of service, bus stops and shelters, and cost of the service.

- **Service Improvements** – Passengers suggested that service is needed more frequently, later on Saturdays, and later on Weekdays. A number of comments were made suggesting improvements to scheduling to improve connections or better coordinate with Cuesta College schedules. Additionally, there were approximately 3 compliments of drivers to every complaint about drivers.

MORRO BAY TRANSIT ONBOARD PASSENGER SURVEY RESULTS

The following provides a summary of survey results for the Morro Bay Transit deviated fixed route, summarized in order of questions on the survey form (see Appendix A for survey instruments). The answers are also summarized in Tables 13 and 14.

Q1. What time did you board this bus?

On average, only one or two passengers responded to the survey each hour, with responses received fairly evenly throughout the day, as shown in Table 13.

Q2. Where did you get on this bus?

Respondents were asked to list their boarding locations by listing either a bus stop or nearby intersection. The stop at Main and Tahiti in North Morro Bay had the most boardings, followed by the stops at Albertsons and Spencer's Market, as shown in Table 15.

TABLE 13: Responses for Morro Bay Transit Onboard Surveys
Questions 1 to 11

Questions	Answers								
Q1. What time did you board the bus?	**6-7 AM**	**7-8 AM**	**8-9 AM**	**9-10 AM**	**10-11 AM**	**11 AM - 12 PM**	**12-1 PM**	**1-2 PM**	**2-3 PM**
Number of Respondents	1	2	2	2	2	1	2	0	2
Percent of Respondents	6%	12%	12%	12%	12%	6%	12%	0%	12%
	3-4 PM	**4-5 PM**	**5-6 PM**	**6-7 PM**	**AM**	**PM**	**SUM**		
Number of Respondents	1	0	1	1	10	7	**17**		
Percent of Respondents	6%	0%	6%	6%	59%	41%			
Q3. Where did you just come from?	**School/College**		**Work**		**Shopping**		**Medical/Dental**		
Number of Responses	2		4		1		3		
Percent of Responses	7%		13%		3%		10%		
	Rec/Social		**Home**		**Personal**		**No Answer**		**SUM**
Number of Respondents	4		1		14		1		**30**
Percent of Respondents	13%		3%		47%		3%		
Q5. How did you get to the bus?	**Transferred**		**Walked**		**Biked**		**Drove Alone**		
Number of Responses	1		23		1		0		
Percent of Responses	4%		88%		4%		0%		
	Dropped off		**Other**		**SUM**				
Number of Respondents	1		0		**26**				
Percent of Respondents	4%		0%						
Q7. How will you complete your trip?	**Transfer**		**Walk**		**Bicycle**		**Drive Alone**		
Number of Responses	10		15		0		0		
Percent of Responses	37%		56%		0%		0%		
	Get Dropped Off		**Other**		**SUM**				
Number of Respondents	1		1		**27**				
Percent of Respondents	4%		4%						
Q8. Where are you going now?	**School/College**		**Work**		**Home**		**Shopping**		
Number of Responses	6		8		5		3		
Percent of Responses	21%		29%		18%		11%		
	Medical/Dental		**Rec/Social**		**Personal**		**Other**		**SUM**
Number of Respondents	1		1		2		2		**28**
Percent of Respondents	4%		4%		7%		7%		
Q10. How often do you ride the bus?	**Daily**		**2-4 days/week**		**1 day/week**		**1-4 days/mo**		
Number of Respondents	13		11		0		3		
Percent of Respondents	48%		41%		0%		11%		
	< 1 day/mo		**First Time**		**SUM**				
Number of Respondents	0		0		27				
Percent of Respondents	0%		0%		100%				
Q11. Do you use other transit services?				**Yes**	**No**	**SUM**			
Number of Respondents				19	6	**25**			
Percent of Respondents				76%	24%				
Q11. If so, which ones?	**RTA #10**		**RTA #12**		**RTA #15**		**SLO Routes**		
Number of Responses	1		9		1		1		
Percent of Responses	4%		39%		4%		4%		
	RTA (general)		**Runabout**		**SUM**				
Number of Respondents	10		1		**23**				
Percent of Respondents	43%		4%						

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.

TABLE 14: Responses for Morro Bay Transit Onboard Surveys
Questions 12 to 20

Questions	Answers								
Q12. Car available for trip?	**Yes**	**No**	**SUM**	**Q14. Have driver's license?**			**Yes**	**No**	**SUM**
Number of Respondents	7	18	**25**	Number of Respondents			13	11	**24**
Percent of Respondents	28%	72%		Percent of Respondents			54%	46%	
Q13. How else would you make trip?	**Ride**		**Drive my car**		**Taxi**		**Walk**		
Number of Responses	8		3		1		14		
Percent of Responses	25%		9%		3%		44%		
	Bike		**No trip**		**Other**		**SUM**		
Numer of Respondents	2		2		2		**32**		
Percent of Respondents	6%		6%		6%				
Q15. Use WC lift?	**Yes**	**No**	**SUM**	**Q17: College student?**			**Yes**	**No**	**SUM**
Number of Respondents	0	25	**25**	Number of Respondents			3	20	**23**
Percent of Respondents	0%	100%		Percent of Respondents			13%	87%	
Q16. Age group?	**< 12**	**13-18**	**19-24**	**25-61**	**62-74**	**75+**	**SUM**		
Number of Respondents	0	1	3	15	3	4	**26**		
Percent of Respondents	0%	4%	12%	58%	12%	15%			
Q18. Opinion of Service?	**1**	**2**	**3**	**4**	**5**	**Average**			
Frequency	0	0	3	8	12	4.4			
On-time	0	0	0	3	20	4.9			
Fares	0	1	1	9	14	4.4			
Comfort	0	0	0	10	12	4.5			
Courtesy of Drivers	0	0	1	2	21	4.8			
Start Time	0	0	3	5	14	4.5			
End Time	1	0	3	6	13	4.3			
System Safety	0	0	0	6	6	4.5			
Convenience of Stops	0	1	1	10	10	4.3			
Convenience of Transfers	0	1	2	7	7	4.2			
Cleanliness	0	0	1	5	5	4.4			
Stops and Shelters	0	0	1	3	3	4.3			
Q19. Overall Ranking?	**Poor**		**Fair**		**Good**		**Excellent**		**SUM**
Number of Respondents	0		0		12		13		**25**
Percent of Respondents	0%		0%		48%		52%		
Q20: Service Improvements?	**Frequency**		**New/Extended**		**Earlier Weekday**		**Later Weekday**		
Number of Responses	7		5		2		5		
Percent of Responses	14%		10%		4%		10%		
	Saturday		**Sunday**		**SUM**				
Numer of Respondents	18		13		**50**				
Percent of Respondents	36%		26%						

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.

Q3. Where did you just come from? Q8. Where are you going now?

These two questions were asked to determine the primary reasons passengers use the transit services. Subtracting responses that listed “home,” the combined results of these two questions give a good indication of trip purpose. Just under a third of survey respondents listed their trip purpose as “personal” (i.e. errands, visiting someone, etcetera), and nearly a quarter listed their trip purpose as work, as shown in Figure 13. Only 14.8 percent said they were taking the bus for school or college, while 11.1 percent said they were taking transit for medical or dental appointments.

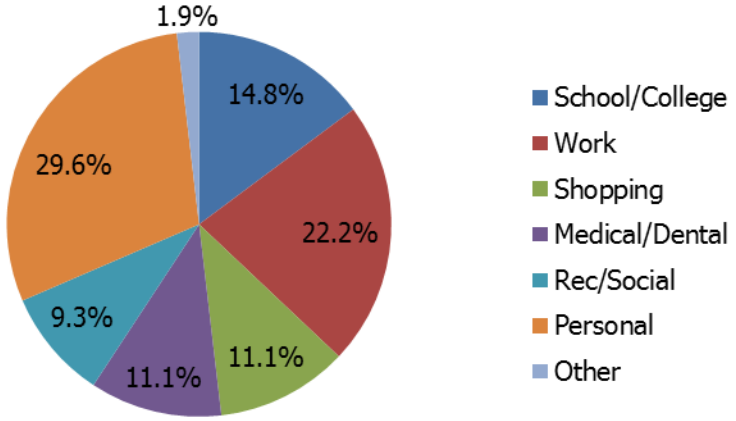
TABLE 15: MBT Onboard Survey Boarding Locations

Morro Bay Transit

Place/Description or Cross Streets	# of Responses
Main & Tahiti	4
Alberson's	3
Spencer's Market	3
Community Center	2
Main & Bonita	2
Main & Sequoia	2
Morro Bay Park	2
Beachcomber & Java St	1
Main & Elena	1
Main & Mindoro	1
Main & Panay	1
Main & San Jacinto	1
Mindoro Stairs	1
Sandalwood & San Jacinto	1
Total	25

Source: Data collected from Question 2 of survey; April 23, 2013. LSC Transportation Consultants, Inc.

FIGURE 13: Trip Purpose, MBT

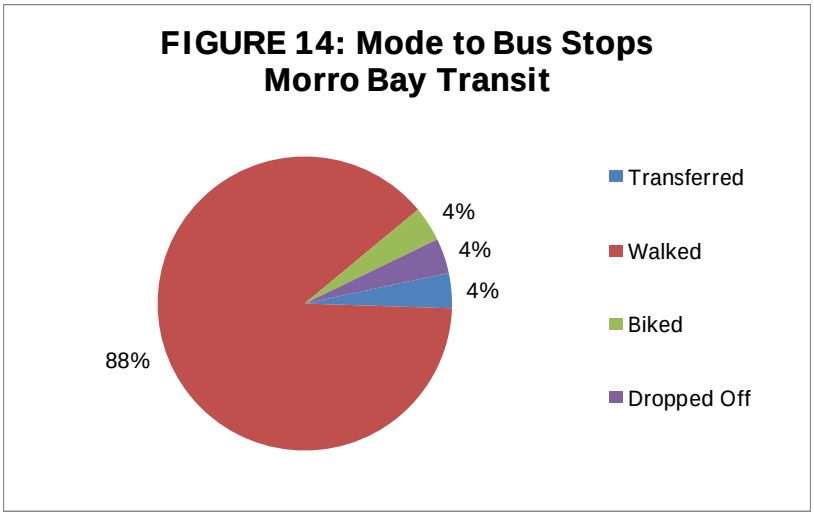


Q4. Where is the location of where you came from?

Passengers were asked to list where they just came from to get an indication of where passengers need service and how close their trip originations are to current bus stops. The detailed results are listed in Appendix A. In short, all of the respondents listed Morro Bay locations, indicating limited travel from other transit systems to the area.

Q5. How did you get to the bus today?

When asked how they got to the bus stop, the majority (23 respondents) said they walked, while one each was dropped off, biked or transferred. The transfer was from RTA Route 12.

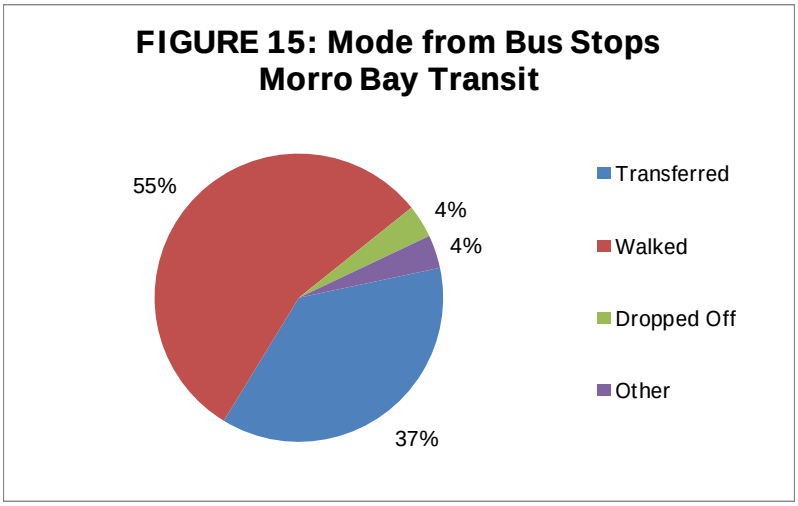


Q6. Where will you get off this bus?

Respondents were asked to list their alighting (getting off the bus) locations by listing either a bus stop or nearby intersection. Half of respondents (10 out of 20) listed Morro Bay Park, while the other half listed various individual stops throughout Morro Bay (see Appendix A for details).

Q7. After you get off this bus, how will you complete your trip?

When asked how they got to the bus stop, more than half of respondents (15 out of 27) said they would walk, followed by those who said they would transfer (10), as shown in Figure 15. Those transferring said they would transfer to RTA Route 12.

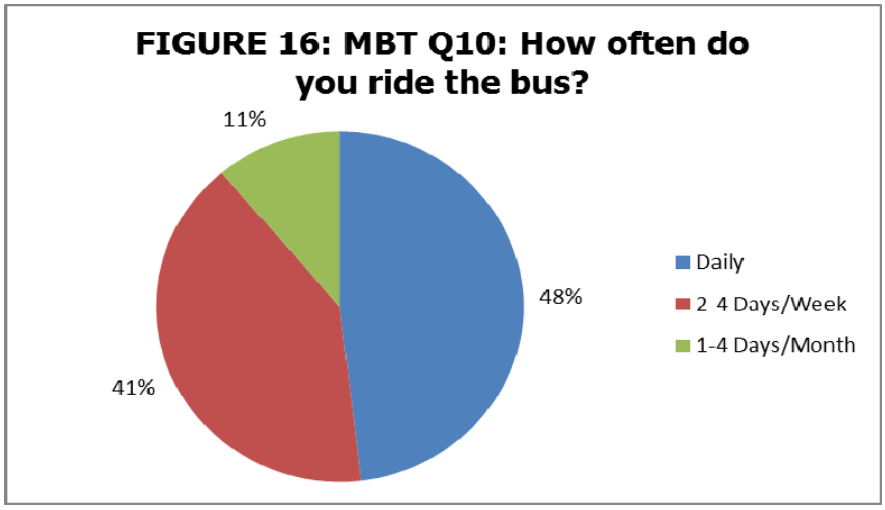


Q9. What is the location of where you are going now?

Similar to question 4, passengers were asked to list where they are going to get an indication of where passengers need service and how close their trip destinations are to current bus stops. The detailed results are listed in Appendix A. While 3 of 18 respondents listed Cuesta College, the remainder or respondents listed various locations throughout Morro Bay.

Q10. How often do you ride the bus?

Passengers were asked how often they ride the bus. Nearly half of the respondents (48 percent) said they use it daily, and another 41 percent said they use it 2 to 4 times per week, as shown in Table 13 and Figure 16. An additional 11 percent said they use it only 1 to 4 times per month.



Q11. Do you use other Regional Transit Services? If so, which ones?

Approximately three quarters of respondents said they use other regional transit services, and a quarter does not. Respondents primarily said they use RTA or RTA Route 12 services (19 out of 23 responses). One each also listed RTA Routes 10 and 15, SLO Transit, and the Runabout, as shown in Table 13.

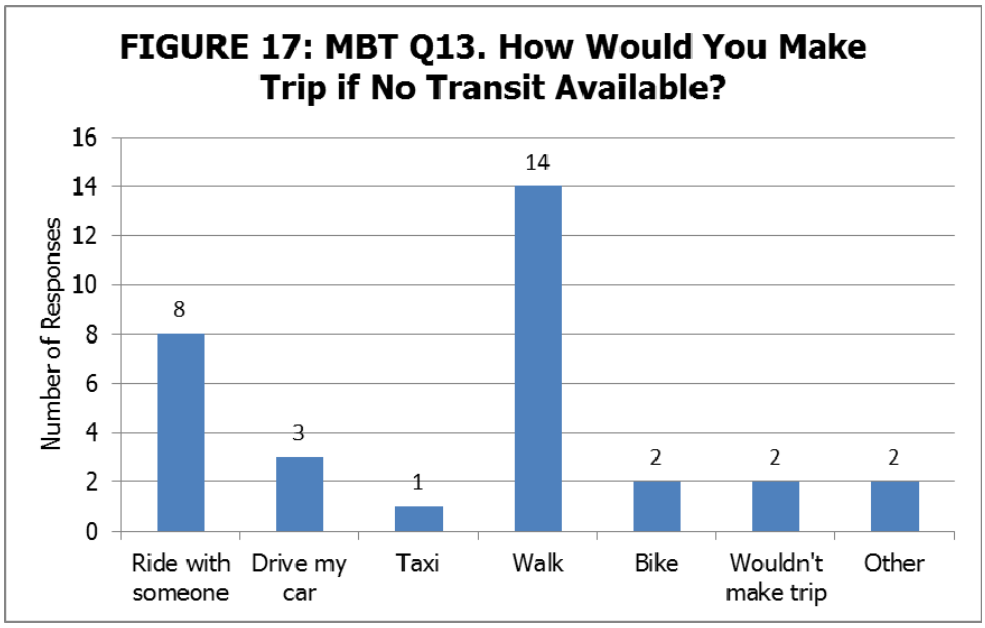
Q12. Did you have a vehicle available for this trip? Q14. Do you have a driver's license?

These two questions were designed to determine if passengers are using the transit service by choice or out of necessity. As shown in Table 14, 28 percent of survey respondents said they had a car available for the trip, while 72 percent did not.

Additionally, approximately 54 percent said they had a drivers' license, but 46 percent did not. This would indicate approximately three-quarters of passengers using the transit system are doing so because they lack other means of transportation, while a quarter are using the service by choice.

Q13. How would you make the trip if MBT was not available?

Passengers said they would walk (14 responses), ride with someone (4 responses), or drive their car (3 responses) if the MBT service were not available. Additionally, 2 individuals each said they would bike, would not make the trip, or would rely on another mode, and 1 individual said they would take a taxi, as shown in Figure 17. These responses indicate a moderate level of transit dependency by the survey respondents.



Q15. Did you require the wheelchair lift to board or exit this vehicle?

None of the survey respondents said they boarded the vehicle in a wheelchair.

Q16. What is your age?

Compared to the RTA routes, a broader range of ages is represented on the Morro Bay Transit service, including 15 percent aged 75 or older. As shown in Table 14, 58 percent of responding passengers were between ages 25 to 61, and 12 percent each were in the 19 to 24 and 62 to 74 age ranges.

Q17. Are you a college student?

Less than half of the passengers surveyed said they were college students, as indicated in Table 14.

Q18. Indicate your opinion of the MBT service from 1 to 5 using the list below. Q19. How do you rate MBT overall?

Passengers were asked to rank service quality factors on a scale of one (1) to five (5), with one (1) being poor and five (5) being excellent. The average ranking was 4.5, and scores ranged from a low of 4.2 (for convenience of transfers) to a high of 4.9 (for on-time performance). The next highest ranking factors overall were driver courtesy, comfort, and start time. The lowest ranking factors (still solidly in the "good" range) were stops and shelters, end times, and convenience of stops. The average ranking by characteristic is shown in Table 14 and Figure 18. In terms of overall ranking, 48 percent listed "good" and 52 percent listed "excellent".

Q20. What service or customer improvements would you like to see?

Passengers were asked to list specific improvements they would like to see by category. As shown in Table 16, the most common answer was for Saturday service (36 percent of all answers), followed by Sunday service (26 percent). The next most common responses were for new or extended routes or later weekday service, each having ten percent of the responses. Detailed responses are included in Appendix A.

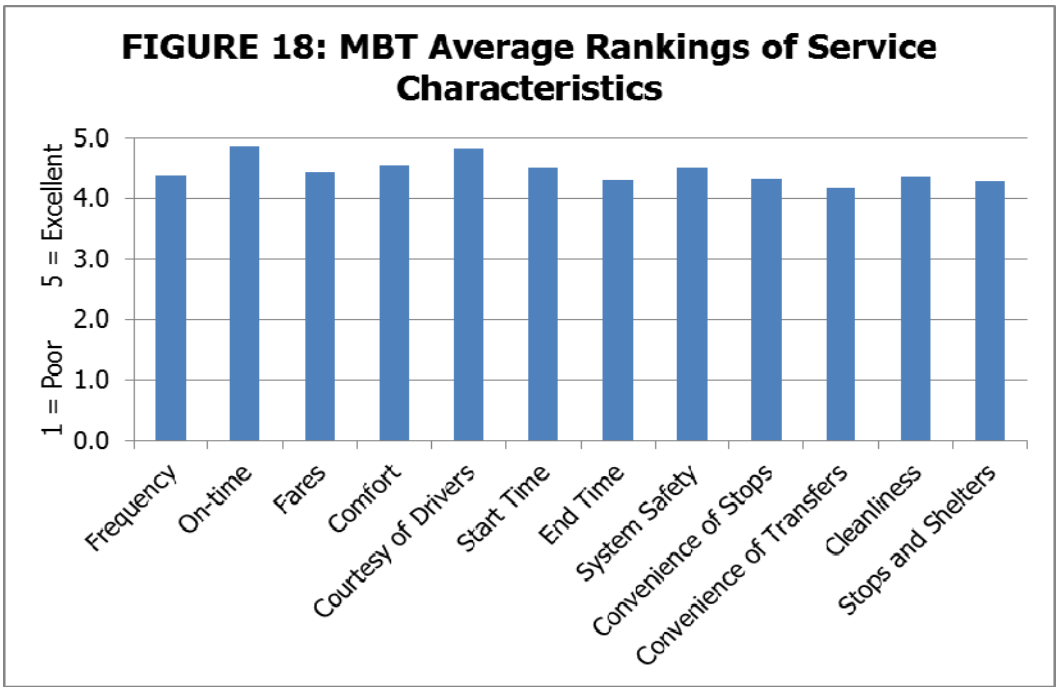


TABLE 16: MBT Q20. Improvements?		
	Responses	
	#	Percent
Increased Service Frequency	7	14%
New Or Extended Routes	5	10%
Earlier Weekday Service	2	4%
Later Weekday Service	5	10%
Saturday Service	18	36%
Sunday Service	13	26%
Other	0	0%
Total Surveys With Responses	50	100%

Q21. Other Comments

Question 21 asked passengers to list any additional comments. These comments have been summarized in Table 17 by subject matter, with compliments (in general, plus for drivers in particular) being the most frequent response, followed by various individual responses about when and where service should occur.

TABLE 17: Q21: Other MBT Comments	
Category	**# of Responses**
Compliment	5
Compliment--drivers	4
Convenient	1
Reinstate DAR	1
Serve Farmers Market	1
Church on Sunday	1
Weekend Service	1
Serve Main & San Jacinto (on RTA Route 15)	1
Total	15

MORRO BAY TRANSIT SURVEY HIGHLIGHTS AND SUMMARY

The onboard passenger surveys conducted on Morro Bay Transit for this study provide an overview on passenger characteristics and travel patterns, which are highlighted and summarized below.

- **Demographics** – MBT passengers are typically adult (58 percent of the riders are adults aged 24 to 65), with a significant elderly ridership (15 percent are age 75 or older). Almost three-quarters of survey respondents are transit dependent due to a lack of car or driver's license, while a quarter are "discretionary" transit users who have other modes of transportation available but choose transit.

- **Travel Patterns** –Most passengers walk to and from the bus stops, while some also transfer from other routes. The primary purpose of the trip is work or personal business. Nearly half of respondents ride the bus daily, and another 41 percent use it 2-4 times per week. While 14 individuals said they would walk if MBT was not available, 8 said they would get a ride and 3 said they would drive their own car.

- **Customer Satisfaction** – Passengers generally rated the service as very good (4.5 overall on a scale of 1 to 5). The three top-ranked attributes were on-time performance (4.9), courtesy of drivers, (4.8) and a three-way tie between comfort, start time and system safety. Lowest-ranking attributes (still ranked "good" overall at 4.2 to 4.3) consisted of convenience of transfers, stops and shelters, end time, and convenience of stops.

- **Service Improvements** – Passengers most often suggested that service is needed on Saturdays and Sundays. Additionally, passengers would like to see later weekday service and increased frequently.

Chapter 4
Summer Morro Bay Trolleys
Onboard Passenger Survey Results

SURVEY COVERAGE AND RESPONSE RATE

Surveys were conducted on the three Morro Bay Trolley routes on July 12 and 13, 2013. Surveys were conducted on Friday and Saturday, which have the greatest ridership, to maximize the number of passengers surveyed. Surveys were not conducted in the prior week which included the July 4th holiday, as the results would not be representative of typical Trolley ridership. Over the course of the surveys, each run of each route was surveyed.

MORRO BAY TROLLEY ONBOARD PASSENGER SURVEY RESULTS

The following provides a summary of survey results for the Morro Bay Trolley surveys. These are summarized in order of questions on the survey form (see Appendix A for survey instruments). The answers are also summarized in Tables 18 and 19 with more detailed short-answer results provided in Appendix A.

Q1. Which Trolley are you on?

A total of 81 valid surveys were completed. Two individuals did not identify which routes they were on. Of those who identified routes, 25 were on the Downtown Trolley, 32 were on the Waterfront Trolley, and 22 were on the North Trolley, as shown in Table 18 and Figure 19.

Q2. What time did you board this trolley?

The greatest number of responses was provided between Noon and 1:00 PM followed by 2:00 to 3:00 PM, as shown in Table 18 and Figure 20.

Q3. Where did you get on this trolley?

Respondents were asked to list their boarding locations by listing either a bus stop or nearby intersection. The responses make it clear that many are unfamiliar with the area, as they listed only generalized locations. The most frequently listed stop was Dorn's at Market and Morro Bay Boulevard, which is the transfer point for the three trolleys (11 responses). The next most often listed were the Embarcadero (multiple locations, with 10 responses total) and Morro Dunes (9 responses).

TABLE 18: Responses for Morro Bay Trolley Onboard Surveys
Questions 1 to 9

Questions **Answers**

Q1. Which trolley are you on?	**Downtown**	**Waterfront**	**North**	**SUM**
Number of Responses	25	32	22	**79**
Percent of Responses	32%	41%	28%	

Q2. What time did you board the bus?	**11 AM - 12 PM**	**12-1 PM**	**1-2 PM**	**2-3 PM**	**3-4 PM**	**4-5 PM**	**5-6 PM**	**6-7 PM**	**SUM**
Number of Respondents	9	18	9	17	6	4	8	2	**73**
Percent of Respondents	12%	25%	12%	23%	8%	5%	11%	3%	

Q4. How did you get to the bus?	**Transferred**	**Walked**	**Drove Alone**	**Dropped Off**	**SUM**
Number of Responses	2	64	1	2	**69**
Percent of Responses	3%	93%	1%	3%	

Q4. If transferred, from which route?	**Down-town**	**Water-front**	**North**	**MBT**	**RTA 15**	**SUM**
Number of Responses	7	6	4	3	1	21
Percent of Responses	33%	29%	19%	14%	5%	

Q5. Trip Purpose?	**Rec/Social**	**Personal**	**Shopping**	**Work**
Number of Responses	31	3	18	1
Percent of Responses	31%	3%	18%	1%
	Restaurant/Bar	**Site-Seeing**	**Home**	**SUM**
Number of Respondents	14	33	1	**101**
Percent of Respondents	14%	33%	1%	

Q7. How will you complete your trip?	**Transfer**	**Walk**	**Drive Alone**	**Ride w/Someone**
Number of Responses	17	34	4	6
Percent of Responses	26%	52%	6%	9%
	Other	**SUM**		
Number of Respondents	4	**65**		
Percent of Respondents	6%			

Q7. If transferring, to which route?	**Down-town**	**Water-front**	**North**	**MBT**	**RTA 15**	**SUM**
Number of Responses	5	6	8	5	1	25
Percent of Responses	20%	24%	32%	20%	4%	

Q8. How often do you ride the bus?	**1-4 days/month**	**2-4 days/week**	**First Time**	**Just for Visit**	**SUM**
Number of Respondents	6	2	32	37	**77**
Percent of Respondents	8%	3%	42%	48%	

Q9. Do you use other transit services?	**Yes**	**No**	**SUM**
Number of Respondents	126	116	**242**
Percent of Respondents	52%	48%	

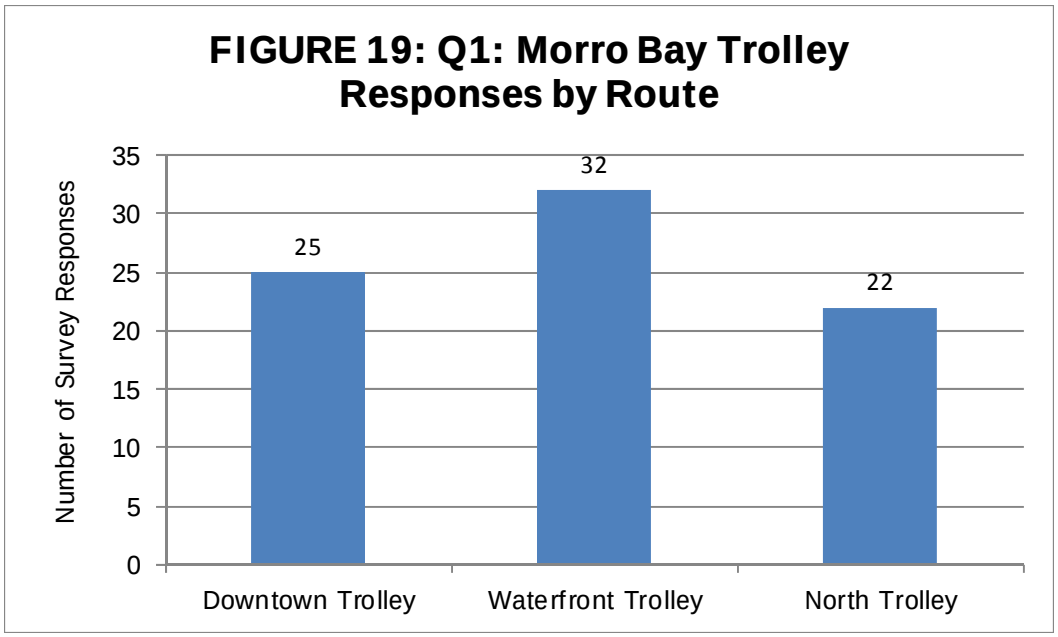
Q9. If so, which ones?	**Down-town**	**Water-front**	**North**	**MBT**	**RTA 12**	**SUM**
Number of Responses	14	10	12	11	1	48
Percent of Responses	29%	21%	25%	23%	2%	

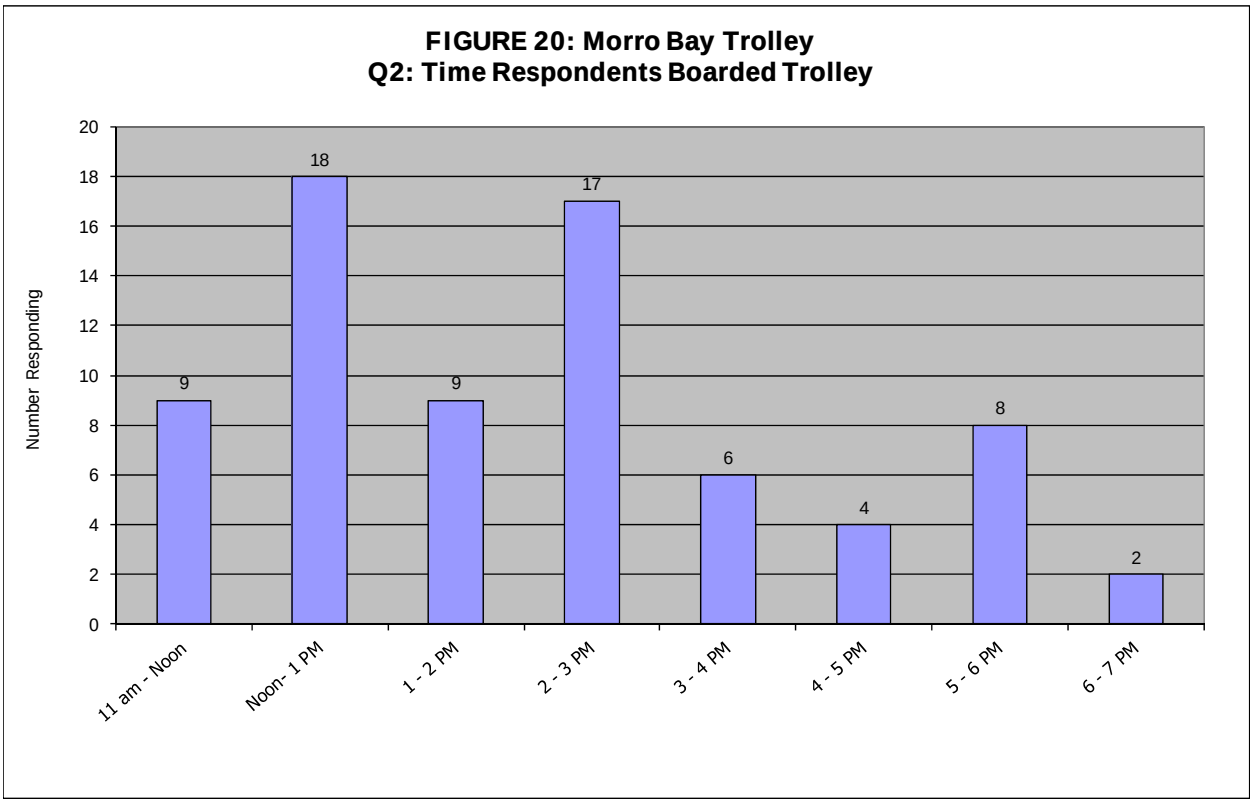
Source: Data collected July 12 and 13, 2013. LSC Transportation Consultants, Inc.

TABLE 19: Responses for Morro Bay Trolley Onboard Surveys
Questions 10 to 20

Questions	Answers							
Q10. Reason for taking the trolley?	**Avoid Traffic**		**Save $ on Driving**		**Avoid Driving**		**Save $/Time on Parking**	**Other**
Number of Responses	7		2		10		3	19
Percent of Responses	9%		3%		13%		4%	24%
	No Car		**Environment**		**Convenient**		**No License**	**SUM**
Number of Respondents	16		5		15		2	79
Percent of Respondents	20%		6%		19%		3%	
Q11. Resident?	**Full-time**	**Part-time**	**No**	**SUM**				
Number of Responses	5	5	65	75				
Percent of Responses	7%	7%	87%					
Q12: Work situation?	**Seasonal FT**		**Seasonal PT**		**Year-Round FT**		**Year-Round PT**	
Number of Responses	1		2		3		1	
Percent of Responses	9%		18%		27%		9%	
	Retired		**SUM**					
Number of Respondents	4		**11**					
Percent of Respondents	36%							
Q13. Zip Code? (Region)	**Arizona**		**Bay Area**		**So. Central Valley**		**Los Angeles Area**	
Number of Responses	2		2		18		11	
Percent of Responses	5%		5%		42%		26%	
	Local		**San Diego**		**Other**		**SUM**	
Number of Respondents	4		3		3		43	
Percent of Respondents	9%		7%		7%			
Q14. Use WC lift?	**Yes**	**No**	**SUM**	**Q17: College student?**		**Yes**	**No**	**SUM**
Number of Respondents	2	65	**67**	Number of Respondents		7	60	**67**
Percent of Respondents	3%	97%		Percent of Respondents		10%	90%	
Q15. Income?	**< $20,000**		**$20,000-50,000**		**$50,000-100,000**		**$100,000+**	**SUM**
Number of Responses	12		18		9		20	59
Percent of Responses	20%		31%		15%		34%	
Q16. Age group?	**< 12**	**13-18**	**19-24**	**25-61**	**62-74**	**75+**	**SUM**	
Number of Respondents	3	8	7	41	12	0	**71**	
Percent of Respondents	4%	11%	10%	58%	17%	0%		
Q18. Opinion of Service?	**1**	**2**	**3**	**4**	**5**	**Average**		
Frequency	1	0	13	16	37	4.3		
Fares	1	2	7	17	45	4.4		
Comfort	2	0	7	19	44	4.4		Overall
Courtesy of Drivers	1	0	2	16	54	4.7		Average =
Start Time	2	1	8	12	43	4.4		4.5
End Time	1	2	8	13	41	4.4		
System Safety	1	0	4	21	43	4.5		
Convenience of Stops	2	0	4	22	40	4.4		
Convenience of Transfers	1	1	5	12	45	4.5		
Cleanliness	2	0	2	11	56	4.7		
Stops and Shelters	3	1	2	16	47	4.5		
Overall	2	0	3	13	50	4.6		

Source: Data collected July 12 and 13, 2013. LSC Transportation Consultants, Inc.





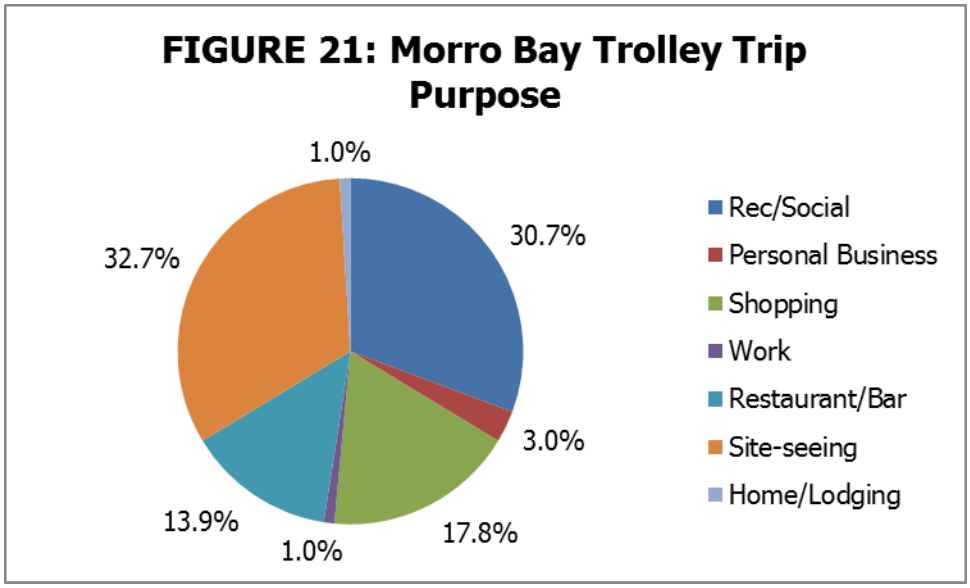
Q4. How did you get to the trolley?

When asked how they got to the trolley stop, the majority (64 of 69 respondents) said they walked, as indicated in Table 18, with two indicating they transferred, two were dropped off, and one drove alone to the stop. Despite this, 21 individuals also listed routes they transferred from. Most frequently, individuals transferred from another

trolley route (17 of 21 responses), or from Morro Bay Transit (3) or RTA Route 15 (1), as also shown in Table 18.

Q5. What was the purpose of your trip today?

Passengers were asked to list their trip purpose by category. Most frequently, passengers said they were riding the trolley for site-seeing (33 responses) or recreation (31 responses). Passengers also listed shopping (18 responses) and restaurants/bars (14 responses) as trip purposes, as shown in Table 18 and Figure 21.



Q6. Where will you get off this trolley?

Respondents were asked to list their alighting locations by listing either a trolley stop or nearby intersection, similar to question 3. The most frequently listed stop was Dorn's at Market and Morro Bay Boulevard (18 responses). The next most often listed were "Campground" (9) and the Embarcadero (multiple locations, with 8 responses total).

Q7. After you get off this trolley, how will you complete your trip?

When asked how they will complete their trip, the most commonly listed was to walk (34 of 65 responses, or 52 percent), followed by those who said they would transfer (17 responses), as shown in Table 18. Most frequently, individuals said they would be transferring to another trolley route (19 of 25 responses), or to Morro Bay Transit (5 responses) or RTA Route 15 (1 response), as also shown in Table 18.

Q8. How often do you ride the trolley?

Passengers were asked how often they ride the trolley: 90 percent said it was their first time or they were riding just during their short visit to the area. Of the regular riders, four said they use the trolley one to four times per month, and two said they use it two to four times weekly, as shown in Table 18.

Q9. Do you use other transit services in the area?

Passengers were asked to check a box listing other transit services in the area which they use. Passengers listed other trolley routes for approximately three quarters of the responses, and Morro Bay Transit for almost a quarter of the responses, as shown in Table 18.

Q10. What is your primary reason for taking the trolley?

Passengers were asked to check a box listing reasons they might take the trolley. Most frequently, passengers cited “other,” which they further defined as “sight-seeing” or “for fun”. Nearly 20 percent of the responses were that the passenger did not have a vehicle available for the trip, and another 19 percent cited the convenience. Answers are listed in Table 19.

Q11. Are you a resident of Morro Bay or the surrounding area?

Most passengers (65 of 75, or 87 percent) said that they were not residents. Of the 10 who said they were, 5 said they were full time and 5 were part time residents.

Q12. If you are a resident, what best describes your work situation?

Residents generally described themselves as retired (4), employed full time year-round (3), or employed seasonally part time (2), as shown in Table 19.

Q13. What is the zip code of your residence?

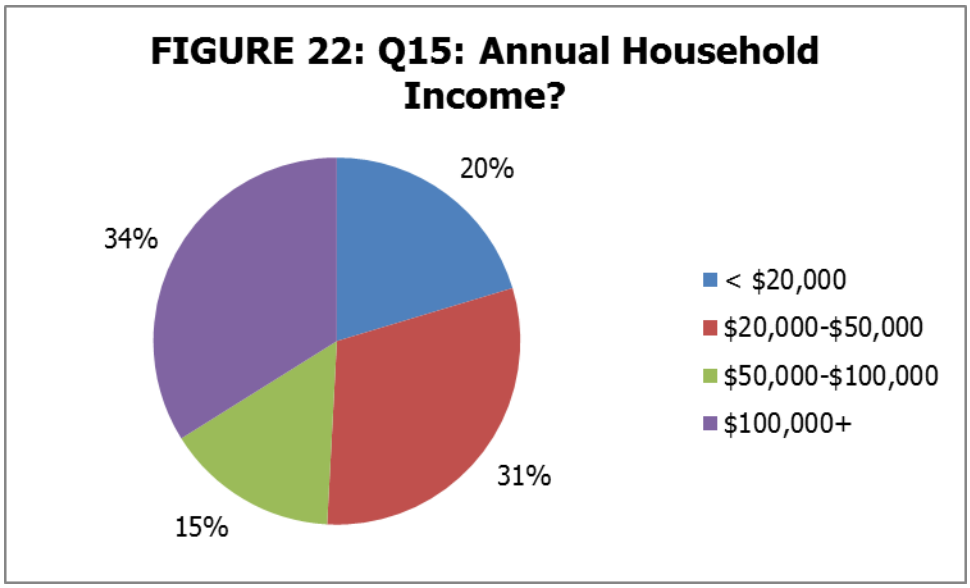
Passengers were asked to list their residential zip code. The data indicates that the majority of visitors come from the South Central Valley (Bakersfield, Visalia, Fresno, and etcetera) and the Los Angeles region, as shown in Table 19.

Q14. Did you require the wheelchair lift to board or exit this vehicle?

None of the survey respondents said they boarded the vehicle in a wheelchair.

Q15. What best describes your annual household income?

Passengers were asked to list their annual household income by category. Approximately half of the respondents said their household was under $50,000, and half said it was over, with 34 percent stating incomes of $100,000 or more, as shown in Table 19 and Figure 22.



Q16. What is your age?

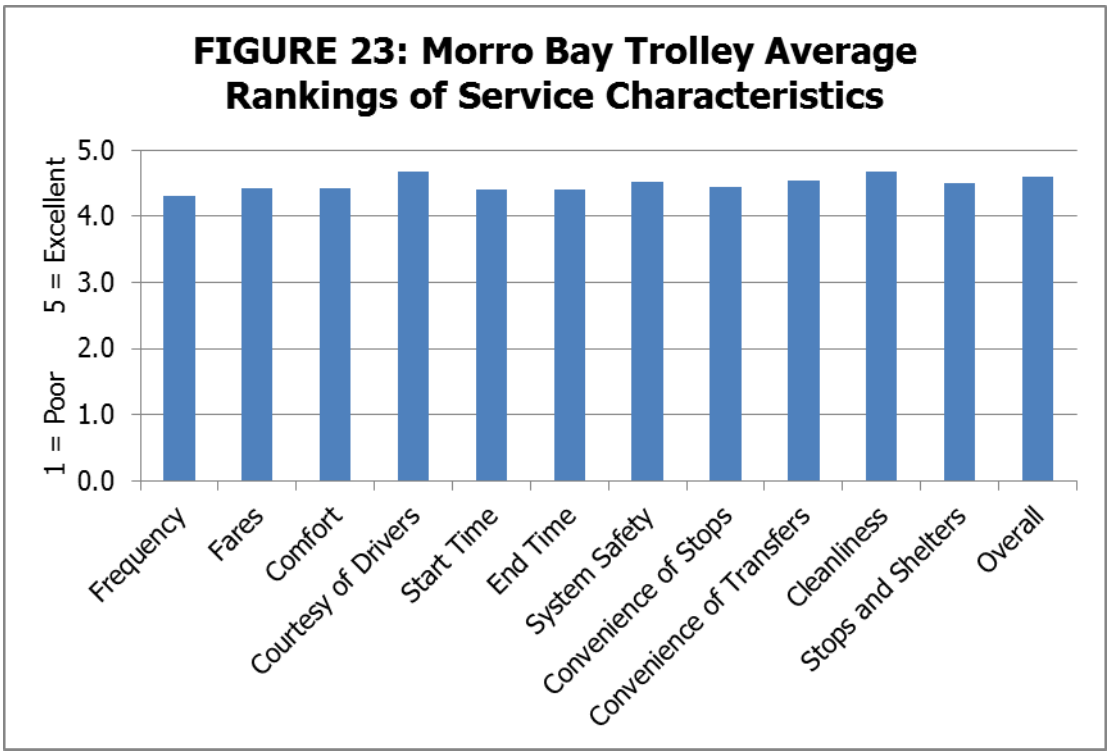
Survey respondents were most often adults age 25 to 61 (41 respondents) or age 62 to 74 (12 respondents). None of the respondents were over the age of 74, as shown in Table 19.

Q17. Are you a college student?

Only ten percent of passengers surveyed said they were college students, as indicated in Table 19.

Q18. Indicate your opinion of the Morro Bay Trolley service from 1 to 5 using the list below.

Passengers were asked to rank service quality factors on a scale of one (1) to five (5), with one (1) being poor and five (5) being excellent. The average ranking was 4.5, and scores ranged from a low of 4.3 (for service frequency) to a high of 4.7 (both cleanliness and driver courtesy). The average ranking by characteristic is shown in Table 19 and Figure 23.



What service or customer improvements would you like to see?

Passengers were asked to list specific improvements they would like to see by category. As shown in Table 20, the majority of comments were compliments, followed by a suggestion to extend service hours. The remaining responses were individual comments. Detailed responses are included in Appendix A.

TABLE 20: Suggested Improvements on Morro Bay Trolleys

Category of Comment /Suggestion	Responses #	Responses %
Compliment	8	42%
Extended Hours	6	32%
Have Change	1	5%
Provide Free	1	5%
More Days	1	5%
Have Seat Belts	1	5%
Provide Bench	1	5%
Total	19	

Other Comments

Passengers were also asked to list any additional comments. A total of 11 additional comments were received, with 5 complimenting the system in general and 4 complimenting a driver. The other two responses suggested a season pass be offered to locals, and gratitude for the campground being served. These comments are listed in Table 21 with the complete results in Appendix A.

TABLE 21: Additional Comments from Morro Bay Trolley Onboard Surveys

Category of Comment /Suggestion	Responses #	Responses %
Compliment	8	42%
Extended Hours	6	32%
Have Change	1	5%
Provide Free	1	5%
More Days	1	5%
Have Seat Belts	1	5%
Provide Bench	1	5%
Total	19	

MORRO BAY TROLLEY SURVEY HIGHLIGHTS AND SUMMARY

The onboard passenger surveys conducted on Morro Bay Transit for this study provide an overview on passenger characteristics and travel patterns, which are highlighted and summarized below.

- **Demographics** – Morro Bay Trolley survey respondents were typically adult (58 percent of the riders are adults age 24 to 65, 17 percent were age 64 to 74, and 10 percent were age 19 to 24). None of the respondents were over the age of 74. While youth were not asked to complete survey forms, many of the passengers traveled as families with small children. Most of the respondents were not local residents.

- **Travel Patterns** –Most respondents walked to and from the bus stops, while some also transferred from other routes. The primary purpose respondents used the service was for site-seeing, social/recreational, shopping, or restaurants/bars, emphasizing the tourist nature of the service. Most passengers were using the trolley for their short visit or for the first time. Passengers primarily chose to use the trolley because it was “fun,” convenient, or allowed them to avoid driving, though 20 percent also said they did not have a car available to make the trip.

- **Customer Satisfaction** – Passengers generally rated the service as very good (4.5 overall on a scale of 1 to 5). The three top-ranked attributes were cleanliness and driver courtesy (both 4.7), and "overall" (4.6). The lowest-ranking attribute (still ranked "good" overall at 4.3) was frequency of service. Despite some observed scheduling issues, these were not expressed by passengers completing surveys.

- **Service Improvements** – Passengers most often suggested that service hours should be extended, as well as days of service.

Miscellaneous Comments and Observations for the Morro Bay Trolleys

During the surveying effort, surveyors and the survey supervisor made notes of any unusual occurrences or notable issues. Surveyors and also were also asked to record any oral comments they received from passengers. Below is a summary of survey staff observations and notes.

Trolley Route and Schedule Adherence

The plan for surveying was to have surveyors scheduled over two days, spending half of each day recording boarding and alightings (Friday from 11:00 AM to 3:00 PM, Saturday from 3:00 PM to 7:00 PM) and the other half of the day distributing and collecting onboard surveys (Friday from 3:00 PM to 7:00 PM and Saturday from 11:00 AM to 3:00 PM). Prior to the survey, Morro Bay Transit staff was asked if there would be any lunch breaks which would need to be accommodated during the survey, but the LSC survey supervisor was told there would be no breaks other than brief bathroom breaks during layovers. With this in mind, surveyor schedules were made which assumed no breaks in the trolley schedule. However, during the weekend of the surveys, there was no relief driver. Drivers were asked to take breaks by the driver supervisor at unscheduled times or chose to do so at seemingly random times, which disrupted the trolley schedules significantly and resulted in some gaps in surveying.

As an example, one driver on the North Route was overdue for a break and decided to take one, but a passenger on board complained that they needed to go to the campground at Morro Strand State Park. The driver grudgingly delayed lunch to take this passenger. When the trolley arrived at the campground, there were nearly 20 passengers waiting to catch the trolley, and they complained that they had been waiting for a long period (some said an hour) and were ready trying to find a number to call to complain.

In another case, the North Morro Bay Trolley driver decided to relieve an RTA Route 15 driver (because RTA was short staffed and needed a lunch break) and left the North Morro Bay Trolley route to cover this break. At the same time, the Downtown Trolley Route driver was asked to leave the route to cover the North Route, switching from the

Downtown Route (in mid-route) to the North Route. The surveyor on the original North Morro Bay Trolley remained with the driver and was unable to continue surveying for nearly an hour.

Drivers also occasionally went off route to accommodate passengers onboard. For example, a driver on the Downtown Route picked up passengers at Morro Bay Park as the trolley was heading to Morro Bay State Park Campground. When the passengers realized the trolley was going the wrong direction, instead of letting the passengers out, the trolley circled back half a dozen blocks to return to Market and Morro Bay Boulevard. The surveyor on the Downtown Trolley noted that the driver always served Stops 5 (Morro Bay State Park Campground) and 7 (Market at Morro Bay Boulevard), but randomly served the remaining stops, sometimes skipping the Downtown portion of the loop altogether.

Drivers explained to surveyors that they were meeting the needs of passengers by responding to these specialized requests, and that passengers were grateful for the drivers' flexibility. However, meeting specialized requests and spontaneously changing routes or schedules seriously impacts the ability of the trolleys to regularly serve passengers not onboard, and results in an overall poorer quality of transit service.

Published Schedules for Trolleys

Another issue with scheduling for the trolleys is that the published information for the trolleys is conflicting. Signs posted at the transfer center in front of Dorn's indicated that the trolley routes operated approximately hourly on the North and Downtown Routes, whereas the online schedule indicates the North and Downtown Routes operate approximately every 30 minutes and the Waterfront Route operates every 20 minutes. In reality, the North Route operated generally every 45 minutes, occasionally taking up to an hour. The Downtown Route operated generally on a 30 minute schedule, but the Waterfront Trolley operated anywhere from 20 to 40 minutes. Given the preponderance of passengers that are visitors and thus rely on the published information to understand the system, the inconsistencies in this information have a substantial impact on passenger's ability to understand and use the system.

Customer Relations

Passengers consistently praised the Waterfront Trolley driver for her humor and informative talks. This driver treats the trolley as a tourist attraction, providing commentary on local sites such as the otter families in the bay, or the costumed pirate in the Embarcadero area. This type of interaction with the passengers strengthens the trolley program's appeal to tourists and should be continued and strengthened.

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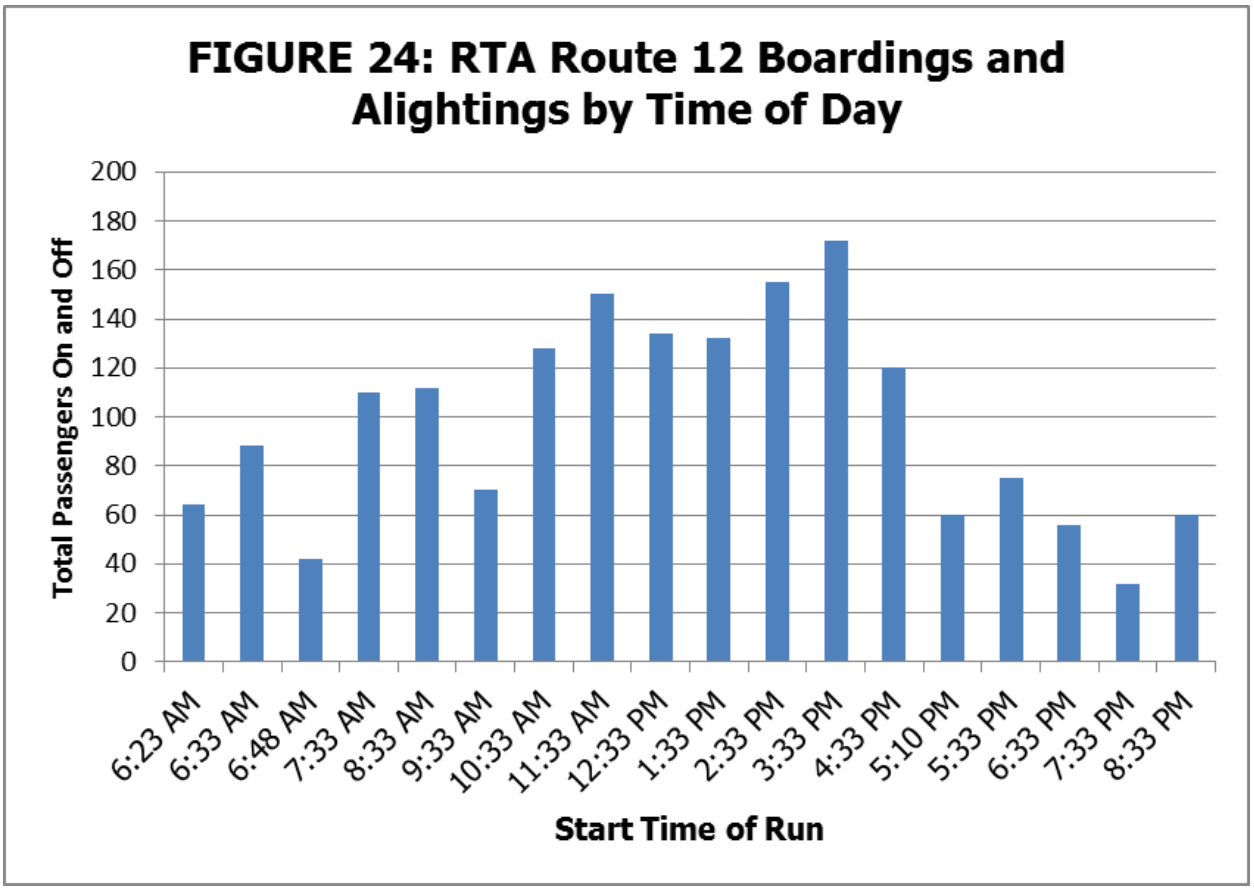
Chapter 5
Boarding and Alighting and On-time Performance Results

The survey effort included tracking boarding and alighting activity and on-time performance for the fixed routes, as well as boarding and alighting activity for the trolley routes. Surveyors were provided with data collection forms with all stops listed and the scheduled time for key stops. Surveyors recorded the number of passengers getting on and off at each stop and recorded the actual departure time from selected time-check stops. This chapter summarizes the results.

BOARDING AND ALIGHTING SURVEY: RTA FIXED ROUTES

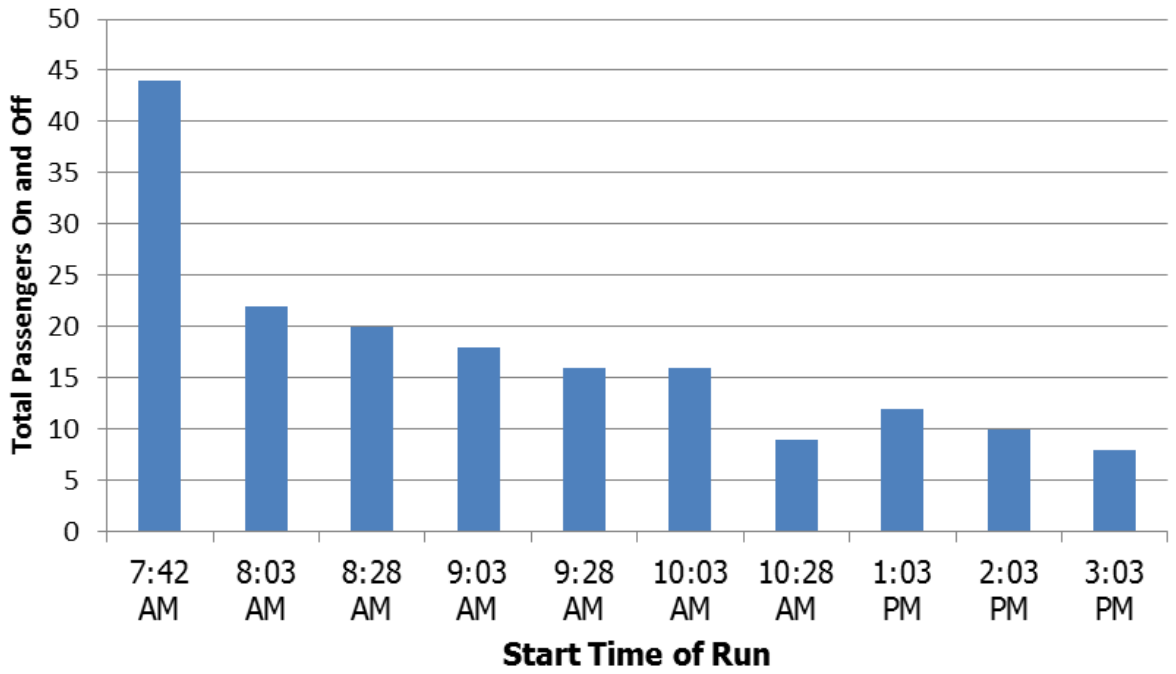
Boarding and Alightings by Time of Day

The boarding and alighting data was summarized by time of day, as shown in Figures 24 to 26. The data includes a count of all passengers boarding and alighting by stop on each route, summarized by hour. As indicated in Figure 24, the busiest time of day on RTA Route 12 was mid-day (11:33 AM to 4:33 PM run). The busiest run of the day was the 3:33 PM run, which had 86 boardings and 86 alightings, for a total of 172 boardings and alightings. On average, 98 passengers boarded and alighted per hour.



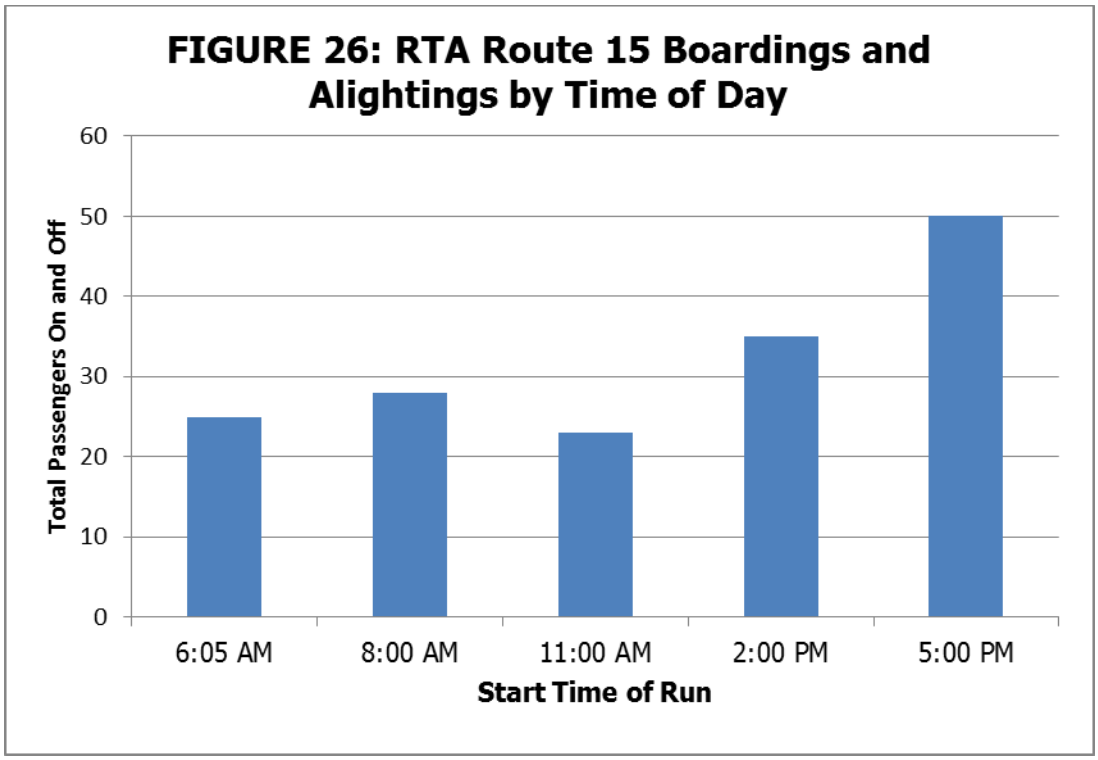
On RTA Route 14, the highest number of boardings and alightings was on the 7:42 AM run, due to the high number of Achievement House patrons using the service at that time (the corresponding 3:48 PM route was not surveyed), as shown in Figure 25. Not including the Achievement House patrons, the average number of boardings and alightings in the northbound direction (SLO to Cuesta College) each hour was 14 passengers, with morning runs busier than afternoon runs. Only three of the southbound runs were surveyed, with 4 to 8 boarding and alightings per trip.

FIGURE 25: RTA Route 14 Boardings and Alightings by Time of Day (to Cuesta College)



Note: 32 of the boardings/alightings on the 7:42 AM run were Achievement House patrons.

RTA Route 15 had almost twice as many boardings and alightings on the last run of the day as any other run, with a total of 50, as shown in Figure 26. The 2:00 PM run was also busy, with 35 passengers boarding and alighting during the run. The average number of boardings and alightings per run was 32.



Boarding and Alightings by Stop

Surveyors collected information on passenger activity at each stop for each run of each route. This data provides an estimate of the daily passenger boarding and alighting activity at each stop.

RTA Route 12

On Route 12, the busiest stops were the San Luis Obispo Transit Center at Palm and Osos Streets in San Luis Obispo (435 boardings and alightings daily); the Cuesta College stop (351 boardings and alightings); and the transit center at Morro Bay Park (223 boardings and alightings), as shown in Table 22. This data is also depicted graphically in Figures 27 and 28. Other high volume stops include the Cal Poly stop on Santa Rosa at Foothill (62 boardings and alightings).

Within Los Osos, the busiest stops on RTA Route 12 include stops at 10th Street and Los Osos Valley Road (LOVR) in Los Osos; LOVR at Ralphs (36 boardings and alightings, plus another 9 at the stop across the street), and LOVR at Vons, as shown in Table 23.

FIGURE 27
RTA Routes 12 and 14 Boardings/Alightings from Cuesta College to Downtown San Luis Obispo
Spring 2013 Surveys

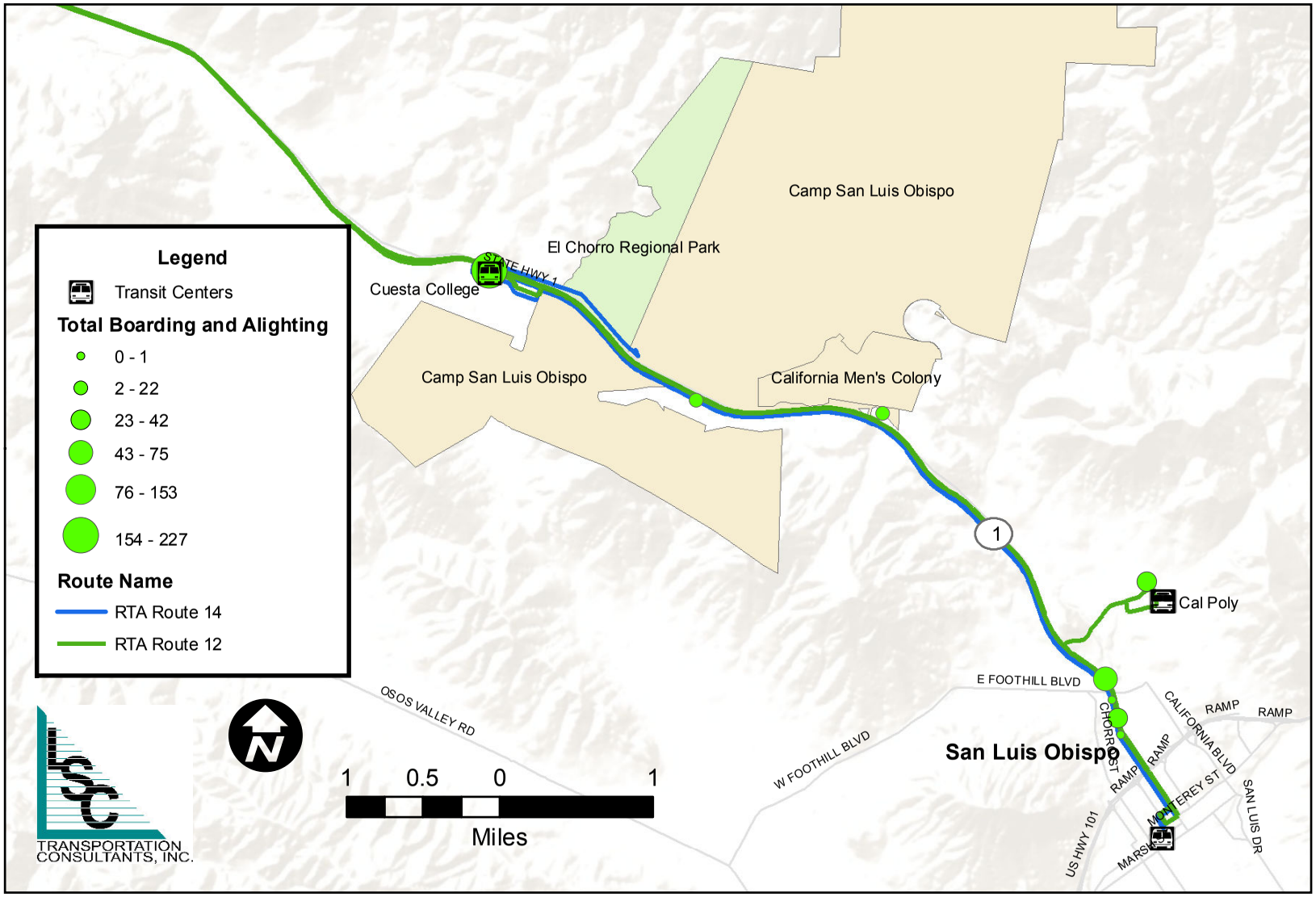


FIGURE 28

Boarding and Alightings in Morro Bay, Los Osos, and Cuesta College

Spring 2103 Surveys

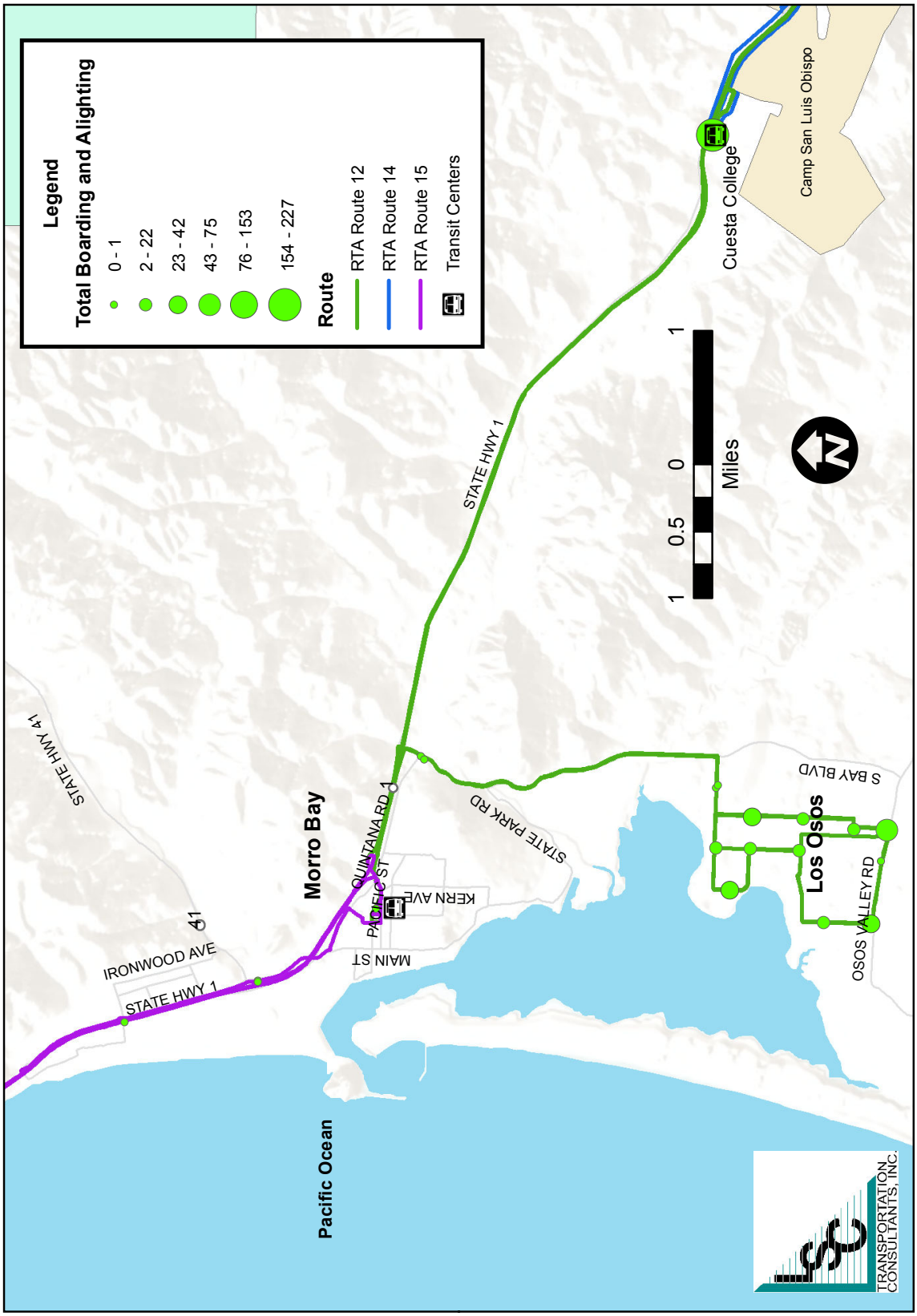


TABLE 22: RTA Route 12 Boardings & Alightings by Stop

Stop	On	Off	Total
Gov't Center SLO	239	196	435
Cuesta College	161	190	351
Morro Bay Park	115	108	223
Santa Rosa at Foothill	3	59	62
10th at LOVR	29	14	43
LOVR @ Ralphs	9	27	36
Pine at LOVR	10	21	31
LOVR @ Vons	0	27	27
Santa Rosa @ Mstng / Stener Glen	23	4	27
Kennedy Library	13	9	22
2nd at Santa Maria	15	5	20
Santa Rosa @ Murray	16	2	18
11th @ El Moro	6	9	15
Pine at Loma	8	6	14
Kansas @ Highway 1 (on call)	10	3	13
LOVR @ Post Office (across from Ralphs)	8	1	9
11th @ Santa Ysabel (temporary)	6	1	7
Ramona @ 7th	2	5	7
Santa Ysabel at 7th	3	4	7
11th @ Ramona	5	1	6
7th at El Morro	2	4	6
LOVR at Sunset	4	0	4
CA Men's Colony (On Call)	0	3	3
South Bay at Quintana	3	0	3
Total	690	699	1,389

Source: LSC Transportation Consultants. Surveys conducted April-May 2013.

RTA Route 14

Boarding and alighting data was collected on all northbound runs (to Cuesta College) but only morning southbound runs (from Cuesta College). However, given that passengers primarily use only a few of the limited number of stops, it is reasonable to assume the afternoon boardings and alightings largely mirror the morning activity.

Table 24 shows the boardings and alightings at stops for the surveyed runs. As indicated, over half of the passengers boarded at Stenner Glen (Mustang Village apartments), and over a third boarded at the Government Center in San Luis Obispo. Almost 80 percent alighted at Cuesta College, most of the remainder alighting at the Achievement Center on the morning run. In the southbound direction, a handful of passengers returned from Cuesta College or were picked up at the Men's Colony. The RTA Route 14 data is also shown in Figures 27 and 28.

TABLE 23: RTA Route 12 Boardings & Alightings by Stop in Los Osos

Stop	On	Off	Total
10th at LOVR	29	14	43
LOVR @ Ralphs	9	27	36
Pine at LOVR	10	21	31
LOVR @ Vons	0	27	27
2nd at Santa Maria	15	5	20
Santa Rosa @ Murray	16	2	18
11th @ El Moro	6	9	15
Pine at Loma	8	6	14
LOVR @ Post Office (across from Ralphs)	8	1	9
11th @ Santa Ysabel (temporary)	6	1	7
Ramona @ 7th	2	5	7
Santa Ysabel at 7th	3	4	7
11th @ Ramona	5	1	6
7th at El Morro	2	4	6
LOVR at Sunset	4	0	4
South Bay at Quintana	3	0	3
Total	126	127	253

Note: LOVR = Los Osos Valley Road

Source: LSC Transportation Consultants. Surveys conducted April-May 2013.

TABLE 24: RTA Route 14 Boardings & Alightings by Stop

Northbound (to Cuesta College)

Stop	On	Off	Total
Gov't Center SLO	34	0	34
Santa Rosa @ Murray	0	0	0
Santa Rosa @ Mstng / Stenner Glen	52	1	53
CA Men's Colony (On Call)	0	0	0
Kansas @ Highway 1	0	0	0
Cuesta College	3	63	66
Achievement House	0	16	16
Total	89	80	169

Southbound (from Cuesta College)

Stop	On	Off	Total
Cuesta College	7	0	7
Kansas @ Highway 1	0	0	0
CA Men's Colony (On Call)	2	0	2
Santa Rosa at Foothill	0	3	3
Santa Rosa at Murray	0	2	2
Gov't Center SLO	0	4	4
Total	9	9	18

Note: Data does not include 1:48 PM, 2:48 PM, 3:30 PM or 3:38 PM southbound runs.

Source: LSC Transportation Consultants. Surveys conducted April-May 2013.

RTA Route 15

Boarding and alighting data was collected on all southbound runs (San Simeon to Morro Bay) and all northbound runs (Morro Bay to San Simeon). Table 25 shows the boardings and alightings by stop. In the southbound direction, the greatest passenger activity was at Morro Bay (with 33 passengers alighting) and at Burton at Main Street in Cambria, where 23 passengers boarded. Additionally, Ocean at Third Street in Cayucos had 8 boardings and 3 alightings.

In the northbound direction, Morro Bay also had the greatest activity with 33 boardings, followed by the Burton and Main Street stop in Cambria, which had 12 boardings and 12 alightings. This data is also depicted in Figure 29.

TABLE 25: RTA Route 15 Boardings & Alightings by Stop

Southbound (San Simeon to Morro Bay)

Stop	On	Off	Total
Hearst Castle Visitor Center	1	0	1
Hearst Drive at San Simeon	3	0	3
Main (Cambria)	1	0	1
Main at Vets Hall	1	2	3
Main	1	0	1
Main @ Bluebird Inn	2	1	3
Burton at Main Street	23	1	24
Burton at Cambria Pines Lodge (across)	1	0	1
Burton at Ardath	0	1	1
Ardath at Highway 1	1	0	1
Ocean at Cayucos Pier	2	3	5
Ocean & 3rd	8	3	11
South Ocean at Old Creek	1	1	2
Highway 1 at San Jacinto	1	2	3
Morro Bay Park	0	33	33
Total	46	47	93

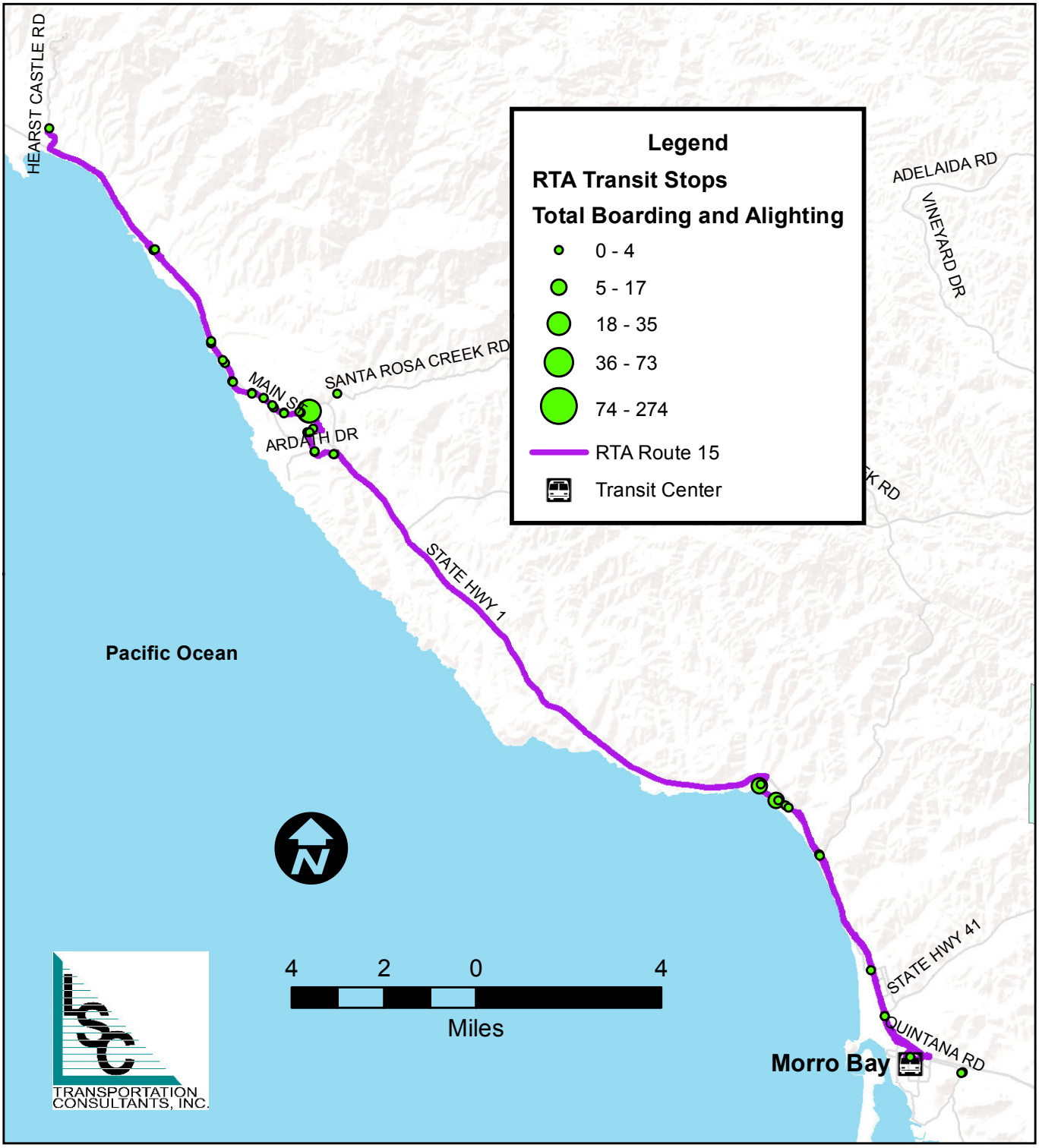
Northbound (Morro Bay to San Simeon)

Stop	On	Off	Total
Morro Bay Park	33	0	33
South Ocean at Old Creek	0	2	2
Ocean at 8th	0	3	3
Ocean at 4th	0	3	3
Cayucos at Ash	5	2	7
Ardath at Highway 1	1	3	4
Burton at Burton Circle	0	4	4
Burton at Cambria Pines Lodge	0	1	1
Burton at Main Street	12	12	24
Main @ Bluebird Inn	0	1	1
Main	0	2	2
Main at Vets Hall	2	0	2
Main	0	1	1
Moonstone Beach Drive 3	0	1	1
Castillo at Otter	0	4	4
Hearst Visitor Center	0	4	4
Total	20	43	63

Source: LSC Transportation Consultants. Surveys conducted April-May 2013.

FIGURE 29
Route 15 Boarding and Alightings

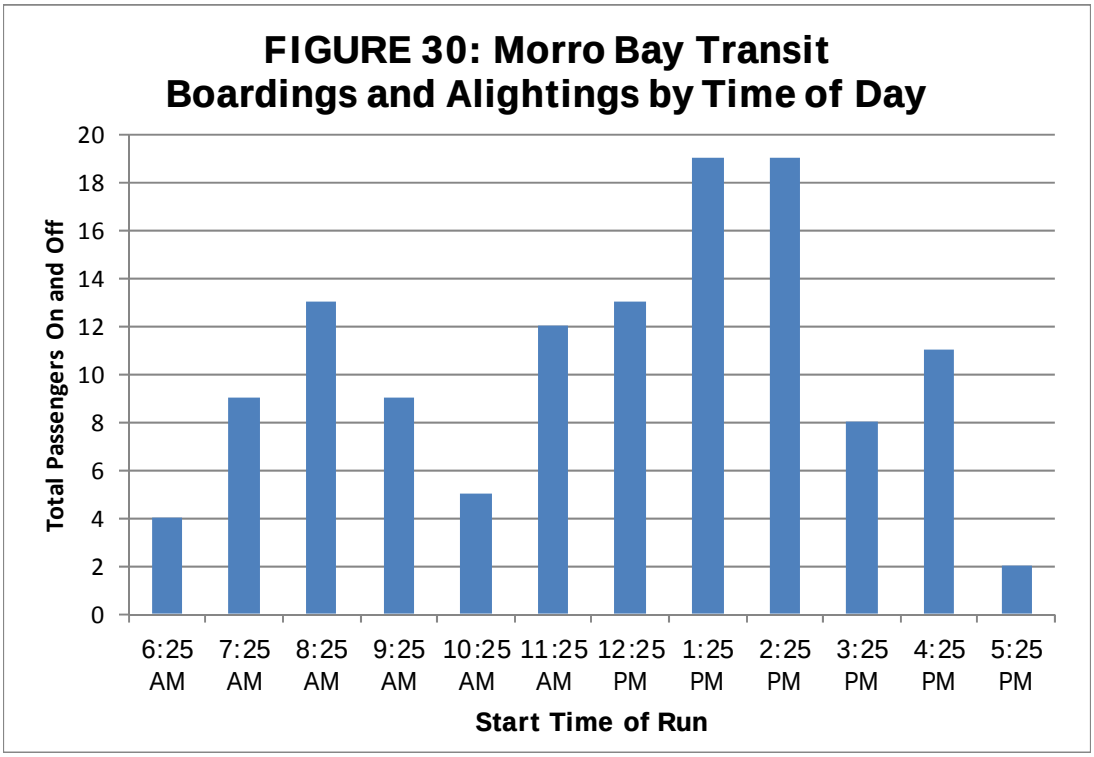
Spring 2013 Surveys



BOARDING AND ALIGHTING SURVEY: MORRO BAY TRANSIT

Boarding and Alightings by Time of Day

Boarding and alighting counts were conducted throughout the day on April 23, 2013. The busiest time of day was mid-afternoon, with 19 passengers boarding and alighting during the 1:25 PM and 2:25 PM runs, followed by 13 passengers boarding and alighting both on the 8:25 AM run and 12:25 PM run. The slowest times of day were the first and last runs of the day, with only 4 and 2 passenger boardings and alightings, respectively. Boardings and alightings by time of day for Morro Bay Transit are shown in Figure 30.



Boarding and Alightings by Stop

Boarding and alighting passengers were also counted at each stop of the Morro Bay Transit Route, including flag stops. As shown in shown in Table 26 below (and detailed in Appendix B), the busiest stop was on Quintana Street at Albertsons, which had 7 boardings and 9 alightings throughout the day. Next busiest was Quintana at the Cookie Crock, which had 1 boarding and 12 alightings, followed by Morro Bay City Park at Harbor Street, which had 3 boardings and 8 alightings. The City Park is also the transfer location to RTA, though no passengers indicated that they had transferred when they were asked. The stops with the most activity are listed in Table 26, below. The boarding and alighting activity is also shown in Figure 31.

TABLE 26: Morro Bay Transit Top Boardings & Alightings Locations

Southbound (San Simeon to Morro Bay)

Stop	On	Off	Total
Quintana at Albertson's	7	9	16
Quintana at Cookie Crock	1	12	13
City Park at Harbor (RTA stop)	3	8	11
Community Center/Senior Center	8	1	9
Main at Sequoia	6	2	8
Main at Spencer's Market	4	4	8
Greenwood at San Jacinto	0	4	4
Main at Bonita	1	3	4
Main at Tahiti	2	2	4
Elena at Elm (Flag Stop)	3	0	3
Greenwood at Elena (Flag Stop)	2	1	3
Greenwood at San Jacinto	0	3	3
Total	37	49	86

Northbound (Morro Bay to San Simeon)

Stop	On	Off	Total
Community Center/Senior Center	8	1	9
Main at Bonita	1	3	4
Pacific St & Kings Ave	0	2	2
Anchor & Main	2	0	2
Harbor Wy & Napa	2	0	2
Mimosa & Hill St (Dial-A-Ride)	2	0	2
Main & Las Vegas	2	0	2
Total	17	6	23

Source: LSC Transportation Consultants. Surveys conducted April 23, 2013.

BOARDING AND ALIGHTING SURVEY: MORRO BAY TROLLEYS

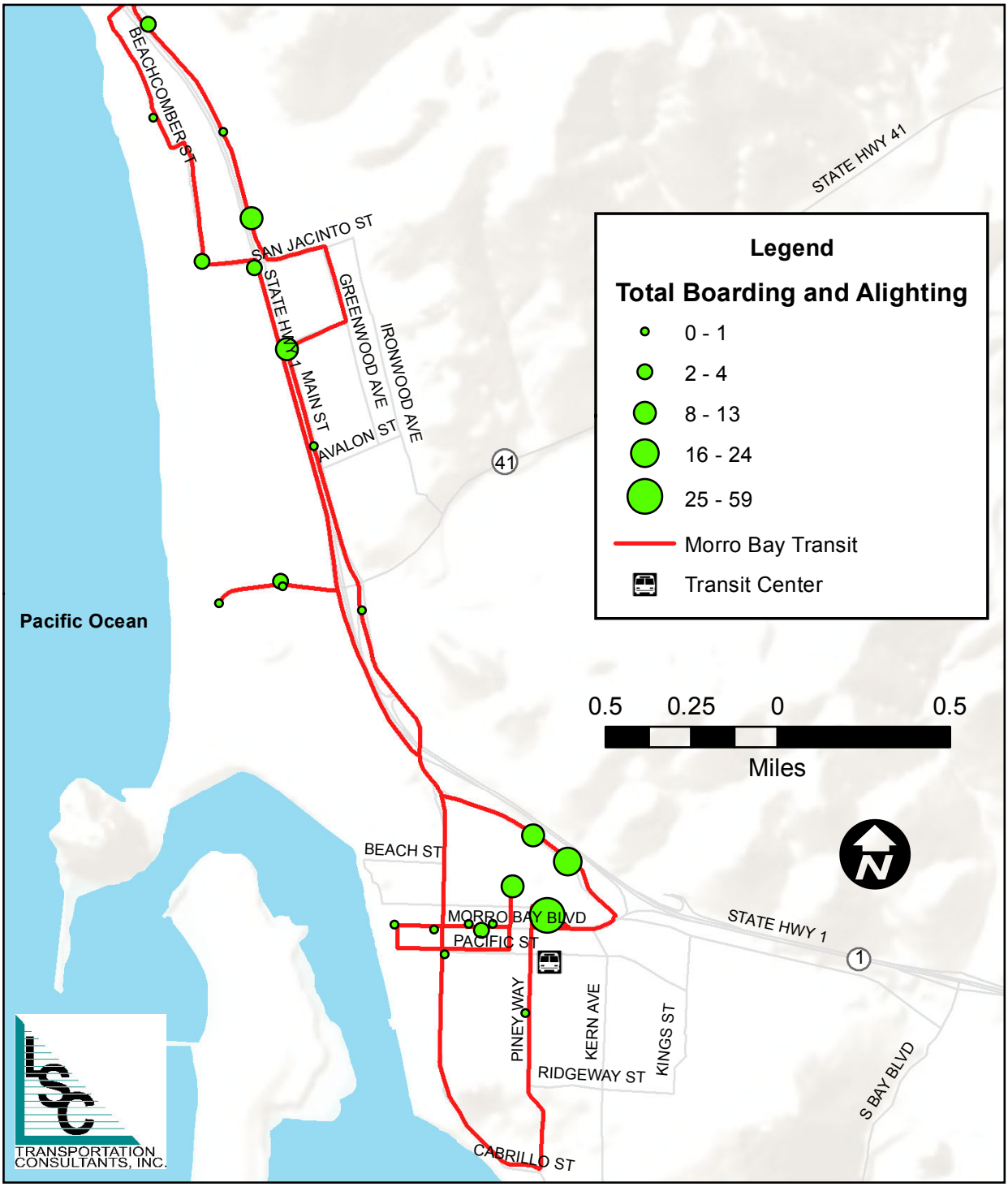
There was some difficulty in tracking the boarding and alighting data for the Morro Bay Trolleys because the North Trolley and Downtown Trolley did not consistently stay on route, and the North Trolley went on break and was substituted by the Downtown Trolley mid-route. Nonetheless, the boarding and alighting data gives a good indication of which stops received the most use. Survey results are discussed by trolley route below.

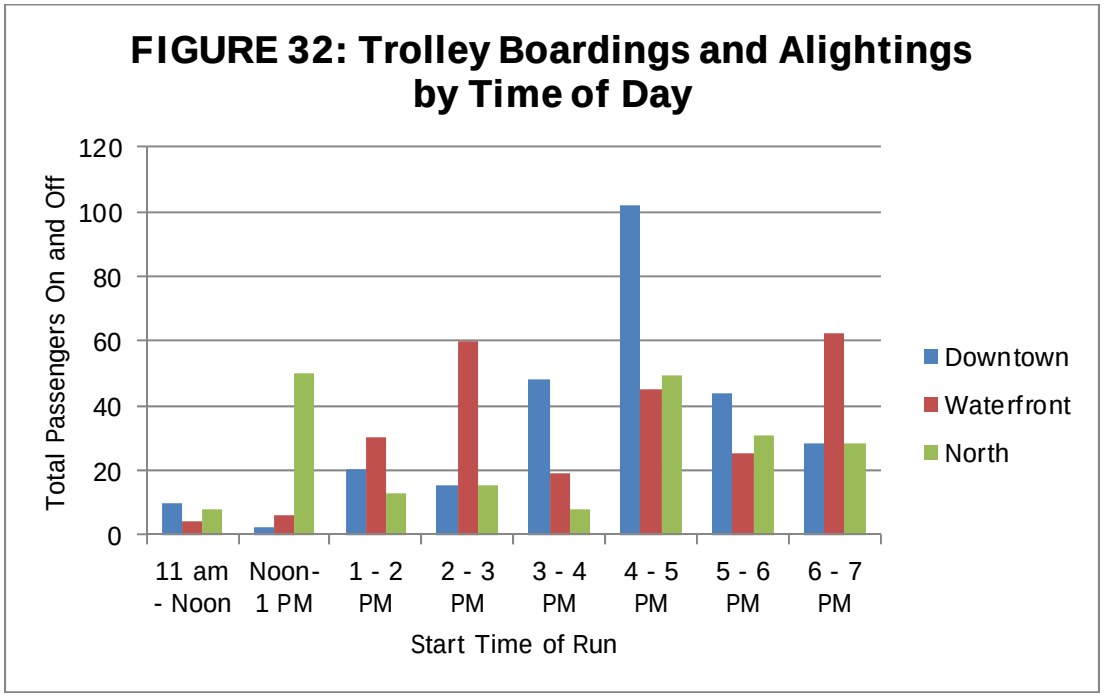
Boarding and Alightings by Time of Day

Boarding and alighting counts were from 3:00 PM to 7:00 PM on Friday, July 12 and from 11:00 AM to 3:00 PM on Saturday, July 13, 2013. The busiest time of day was late afternoon (after 4:00 PM), and while Saturday was busier than Friday, Friday after 4:00 PM was also busier than before 4:00 PM (from observations, but no counts were conducted). The different trolley routes were busy at different times of the day, however, with the North Route having more ridership earlier in the day. Morro Bay Trolley boardings and alightings by time of day are shown in Figure 32.

FIGURE 31
Morro Bay Transit Boardings and Alightings

Spring 2013 Surveys





Boarding and Alightings by Stop

Surveyors counted passengers getting on and off at each stop for each run. Overall, the stop at Market and Morro Bay, which serves as a transfer point for all three trolleys, was the busiest. Other stops with high levels of passenger activity include Morro Strand State Park Campground on the North Route, Morro Bay State Park Campground on the Downtown Route, and the many stops along the Embarcadero on the Waterfront Route. This data is shown in Table 27.

ON-TIME PERFORMANCE SURVEY RESULTS

Surveyors recorded on-time performance data for all of the routes. For each route, departure times were recorded at check points throughout the day. The vehicles were considered on-time if they departed the stop at or up to five minutes after the scheduled time, were considered early if they left a minute or more before the scheduled time, were considered late if they departed more than five minutes but no more than ten minutes after the scheduled time, and were considered very late if they left more than ten minutes past the scheduled time. Results of the surveys are presented below for each route. A summary of on-time performance is presented in Table 28 and discussed below. It should be noted that this analysis is based on an average of one day of data collection, and therefore provides a snapshot of on-time performance rather than a long-term profile.

TABLE 27: Morro Bay Trolley Boardings & Alightings by Stop

North Trolley Route			
Stops	**On**	**Off**	**Total**
Main at Bonita	9	1	10
Main at Elena	2	0	2
Main at Jamaica	0	5	5
Morro Strand SP Campground	42	24	66
Hwy 1 at San Jancinto	2	0	2
Atascadero at 200 Block (north side)	0	3	3
Main & Dune (Days Inn)	0	6	6
Atascadero at Morro Dunes	4	6	10
Atascadero at 200 Block (south side)	0	2	2
Market at Morro Bay Blvd	37	50	87
Morro Bay Blvd	0	2	2
City Park at Harbor	0	5	5
Main at Errol	0	2	2
Total	96	106	202

Downtown Trolley Route			
Stops	**On**	**Off**	**Total**
Shasta at Kennedy Way	4	2	6
Market at Morro Bay	0	4	4
City Park at Harbor	7	2	9
Homes near golf course	0	6	6
Morro Bay SP Campground	29	77	106
Near Estuary	2	0	2
Main at Marina	0	2	2
Market at Morro Bay Blvd	83	51	134
Farmer's Market	6	0	6
Morro Bay Blvd at Main	1	0	1
Total	132	144	276

Waterfront Trolley Route			
Stop	**On**	**Off**	**Total**
Embarcadero at Front	22	46	68
Morro Rock	15	5	20
Flag Stop near Morro Rock	4	0	4
Embarcadero at Coleman Beach	3	9	12
Embarcadero at Beach	7	13	20
Giovanni's	0	4	4
Embarcadero at Harbor	23	10	33
Market	0	3	3
Embarcadero at Pacific	34	2	36
Flga Stop between Pacific & Marina	2	0	2
Embarcadero at Marina	7	8	15
Tidelands Park	0	3	3
China Buffet	0	14	14
Embarcadero at Driftwood	0	0	0
Embarcadero at Giant Chessboard	9	6	15
Market at Morro Bay Blvd	25	28	53
Total	151	151	302

Source: LSC Transportation Consultants, Inc. Surveys conducted July 12 and 13, 2013.

TABLE 28: On-time Performance Survey Results

Route	Time Checks [1]	Early [2]	On-Time [3]	Late [4]	Very Late [5]
RTA Route 12	135	14%	79%	6%	1%
RTA Route 12 (not Los Osos detours)	88	9%	83%	5%	1%
RTA Route 14 (Northbound)	19	0%	79%	11%	11%
RTA Route 14 (Southbound)	4	0%	100%	0%	0%
RTA Route 15	37	8%	92%	0%	0%
Morro Bay Transit	51	0%	100%	0%	0%

Note 1: Total number of departure times recorded throughout the day at timechecks on route.
Note 2: Departed stop prior to posted time in printed schedule.
Note 3: Not early, and departed not more than 5 minutes after time printed in schedule.
Note 4: Departed stop 6 to 10 minutes after time printed in schedule.
Note 5: Departed more than 10 minutes after time printed in schedule.
Source: LSC Transportation--onboard surveys conducted April-May 2013.

RTA Route 12

On-time performance for Route 12 was tracked in two ways: both including stops in Los Osos, and excluding stops in Los Osos. Due to construction, passengers are aware that schedules within the Los Osos community vary, and it is not necessarily a useful measure to track performance at these stops. Excluding stops within Los Osos, Route 12 was on-time 83 percent of the time, with buses leaving stops prior to the scheduled departure time 9 percent of the time, late 5 percent of the time and very late 1 percent of the time. The early departures (one to two minutes prior to the scheduled time) were from Cuesta College. It is likely the bus leaves when everyone at the stop is boarded and no one else is in sight, as it takes a few minutes to cross the parking lot to the stop. Nonetheless, the drivers should wait until the exact scheduled departure time before departing.

RTA Route 14

Route 14 had just two time points for each run: at the Government Center and at Cuesta College. The bus ran late at both stops on two mid-morning northbound runs, so that the on-time performance was 79 percent. Only two southbound runs were observed, and were on-time 100 percent of the time.

RTA Route 15

On-time performance was observed on five runs on Route 15. On three runs, the bus departed a stop early, so that on-time performance was 92 percent. In one case, the bus left Ocean Street at Cayucos Boulevard one minute early, and twice the bus left Burton and Main in Cambria two to three minutes early.

Morro Bay Transit

Morro Bay Transit was 100 percent on-time throughout the day, never departing more than a few minutes from the published schedule.

Morro Bay Trolleys

Published trolley schedules provide only a daily service stop and end time and an approximate run time. As a result, on-time performance can only be evaluated in terms of the relative time it took complete each run. In fact, during the surveys, conflicting information was available about how often the trolleys would complete a run. The map and guide posted at the transfer center at Market and Morro Bay Boulevard indicated the North Route and Downtown Routes were on hourly headways, while the online brochure and brochures available on the trolleys indicated 30 minute headways on these two routes. Because of this, on-time performance surveys were not planned as part of the survey effort, but surveyors often did track the start and end time of each run in order to determine approximately how long each run took to complete. The results are presented in Table 29.

As shown in Table 29, the Downtown Trolley route took anywhere from 21 to 37 minutes to complete (averaging 29 minutes). However, the shortest runs were incomplete runs, primarily serving between Market at Morro Bay Boulevard and the Morro Bay State Park Campground, and skipping the downtown loop to Morro Bay Park.

The Waterfront Trolley was most consistent in terms of staying on route, but run times were from 18 minutes to 55 minutes, averaging 35 minutes. Quite often, the trolley was observed having a long layover at Morro Rock in order for passengers to watch the otters with pups in the bay.

The North Trolley took between 28 to 64 minutes to operate, averaging 38 minutes. However, there were inconsistencies in the routing several times during the day, including when the driver left the route to substitute for an RTA driver.

TABLE 29: Morro Bay Trolley Recorded Run Times

Downtown Trolley			Waterfront Trolley		North Trolley		
Start Time	Notes	Minutes	Start Time	Minutes	Start Time	Notes	Minutes
11:04 AM		28	11:00 AM	40	11:06 AM		38
11:32 AM		30	11:40 AM	--	11:44 AM		36
12:02 PM		--	12:40 PM	25	12:00 PM	*Went on break; Downtown*	
12:20 PM	*Switched to North*	--	1:05 PM	33		*took North run*	
1:45 PM	Partial run	11	1:38 PM	22	1:00 PM		64
1:56 PM		27	2:00 PM	20	2:05 PM		46
2:23 PM		47	2:20 PM	47	2:51 PM		37
3:00 PM	*approximate*	30	3:07 PM	55	3:32 PM		48
3:30 PM	*approximate*	30	4:02 PM	38	4:20 PM		42
4:00 PM	*approximate*	30	4:40 PM	18	5:02 PM		28
4:30 PM	*approximate*	30	4:58 PM	22	5:32 PM		30
5:00 PM	*Driver took lunch*	--	5:20 PM	17	6:02 PM		--
5:27 PM	*Partial run*	21	5:37 PM	23			
5:48 AM	*Partial run*	24	6:00 PM	14			
6:12 PM		--	6:14 PM	--			
Average Run Time		*30*		*29*			*41*

Note: Start Times are from Market Street and Morro Bay Boulevard

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Chapter 6
Analysis of Transfers Between Routes/Services

TRANSFER SURVEYS

Throughout the San Luis Obispo County North Coast area, there are multiple transit providers operating multiple routes. One goal of this study was to try to get a better understanding of transfer patterns among the various services. Several survey tasks were implemented to achieve this:

1. The boarding and alighting forms included lines at transfer points for the surveyors to record passengers coming from another route (by a show of hands). This occurred at City Park in Morro Bay, and was included on boarding and alighting forms for Morro Bay Transit, RTA Route 12 and RTA Route 15, as well as at Market Street and Morro Bay Boulevard for trolley routes.

2. Surveyors were stationed at the main SLO Transit and RTA transfer stop in San Luis Obispo (at the intersection of Osos Street and Palm Street) who asked passengers if they had transferred from another service. Using survey forms developed by the Consultant, surveyors boarded each SLO Transit and RTA bus and asked passengers to indicate by a show of hands if they had transferred from another specified route.

Transfer Analysis from Boarding and Alighting Forms

According to boarding and alighting survey results, the percent of boarding passengers that transferred from another route ranged from 2 to 27 percent, as shown in Table 30. While a small percentage of boardings on RTA Route 12 were transfers (14 out of 792 boardings), more than a quarter of boarding on RTA Route 15 were transfers (26 out of 96 boardings). Morro Bay Transit received just 5 passengers from RTA Route 12, and 1 from RTA Route 15.

SLO Transit and RTA Transfers

Surveyors were placed at the SLO Transit Transfer Center and the Government Center at Osos and Palm Streets in San Luis Obispo in order to conduct a survey of transfers between routes. Surveyors recorded the number of transfers to and from all routes by boarding the SLO Transit and RTA buses as they arrived at the stops, and asking passengers to indicate by a show of hands if they had transferred from the specific route the surveyor announced. This data was recorded at the two stops simultaneously for an equivalent of a full day of service (6:00 AM to 8:00 PM) in early May, 2013. Sample transfer forms are included in Appendix C.

TABLE 30: North Coast Transfers			
	Transfers to…		
Transfers from…	RTA 12	RTA 15	MBT
RTA Route 12		25	4
RTA Route 15	9		0
MBT	5	1	
Total	14	26	4

		Transfers	
Transfers from…	Surveyed Boardings	# by show of hands	% of Boardings
RTA Route 12	792	14	2%
RTA Route 15	98	26	27%
MBT	64	4	6%
Total	954	44	5%

Source: LSC Transportation, Inc. boarding and alighting forms.

Table 31 presents the the transfers that occurred over a full day between SLO Transit Routes and RTA routes at the RTA stop at the Government Center. As indicated, a total of 183 transfers occurred, with 89 of these transfers to North Coast Routes RTA 12 and 14. As average daily ridership on Routes 12 and 14 is approximately 800 to 900 passengers per weekday, this indicates a minimum of ten percent of passengers are transferring at this location.

TABLE 31: Transfers from SLO and RTA Routes to RTA Routes at Osos and Palm Streets

	Transferring From											
Transferring To	SLO 1	SLO 2	SLO 3	SLO 4	SLO 5	SLO 6a	SLO 6b	RTA 9	RTA 10	RTA 12	RTA 14	TOTAL
RTA 14	1	0	2	0	0	0	0	0	0	0	0	3
RTA 9	0	1	1	0	0	0	0	4	10	29	2	47
RTA 12	0	3	2	3	1	0	0	41	34	2	0	86
RTA 10	0	0	1	2	1	0	1	14	2	26	0	47
TOTAL	1	4	6	5	2	0	1	59	46	57	2	183

Surveys conducted at the RTA Government Center Stop from 7:00 AM to 8:00 PM (different days, adding up to 13 hours, including express runs).

Table 32 shows the transfers recorded on the SLO Transit buses located diagonally across the street from the RTA Government Center stop. A total of 25 passengers indicated that they transferred from an RTA bus to board a SLO Transit bus.

TABLE 32: Transfers to SLO from RTA			
	Transferring from:		
To:	RTA 12	RTA 14	Total
SLO 1	0	0	0
SLO 2	3	1	4
SLO 3	8	0	8
SLO 4	7	1	8
SLO 5	2	0	2
SLO 6a	0	0	0
SLO 6b	3	0	3
Total	23	2	25
Source: LSC, Transportation Inc. Surveys were conducted an equivalent of 7:00 AM to 8:00 PM in early May 2013.			

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Chapter 7
Cuesta College Intercept Surveys and Achievement House Outreach

CUESTA COLLEGE INTERCEPT SURVEYS

Intercept surveys were conducted on the Cuesta College campus on Wednesday, April 23 and Thursday, April 24 from 9:00 AM to 1:00 PM. LSC and SLOCOG staff were stationed in front of the library and computer center from 9:00 to 11:00 AM, and then in front of the cafeteria from 11:00 AM to 1:00 PM. These times, dates and locations were recommended by the Cuesta College Student Affairs Office in order to reach the broadest class schedules and to maximize contact with students.

A display table included the following display and outreach materials:

- A poster advertising the table as a "Transit Information Booth"
- A map of the Morro Bay Transit route
- A map of the North Coast transit services
- Riders Guides for RTA Routes 12, 14 and 15
- Riders Guide for Morro Bay Transit
- Comment Cards (in English and in Spanish)
- RTA and Morro Bay day passes (as rewards for completing comment cards)

Samples of these items are included in Appendix D. As people passed the table, LSC and SLOCOG staff asked individuals if they were interested in transit services. Those who said they were or who stopped for more information were asked (1) if they currently use any of the transit services, (2) if so, did the service work well for them or could they suggest improvements, and if not, (3) were there changes that could be made to the service so that they could use it. These individuals were also encouraged to fill out comment cards. Below is a summary of responses.

Comment Card Responses

A total of 15 comment cards were completed on the April 22, and 27 comment cards were completed on April 25, for a total of 42 responses. Two of the cards were completed in Spanish. The comments responses are detailed in Appendix D and summarized below.

<u>From Current Transit Users</u>

All but three of the survey respondents are current or recent transit users. Of those:

- 31 use RTA Route 12; 18 use RTA Route 14, and 10 use SLO Transit.

- The most common comment was that everything worked well (9 responses), followed by requests for increased frequency or added locations (6 responses each), or for extended hours (4 comments).

- Several commented on improvements they would like to see to encourage them to use the bus more, including more frequency, more stops, lower costs, and shorter travel times.

From Non-Transit Users

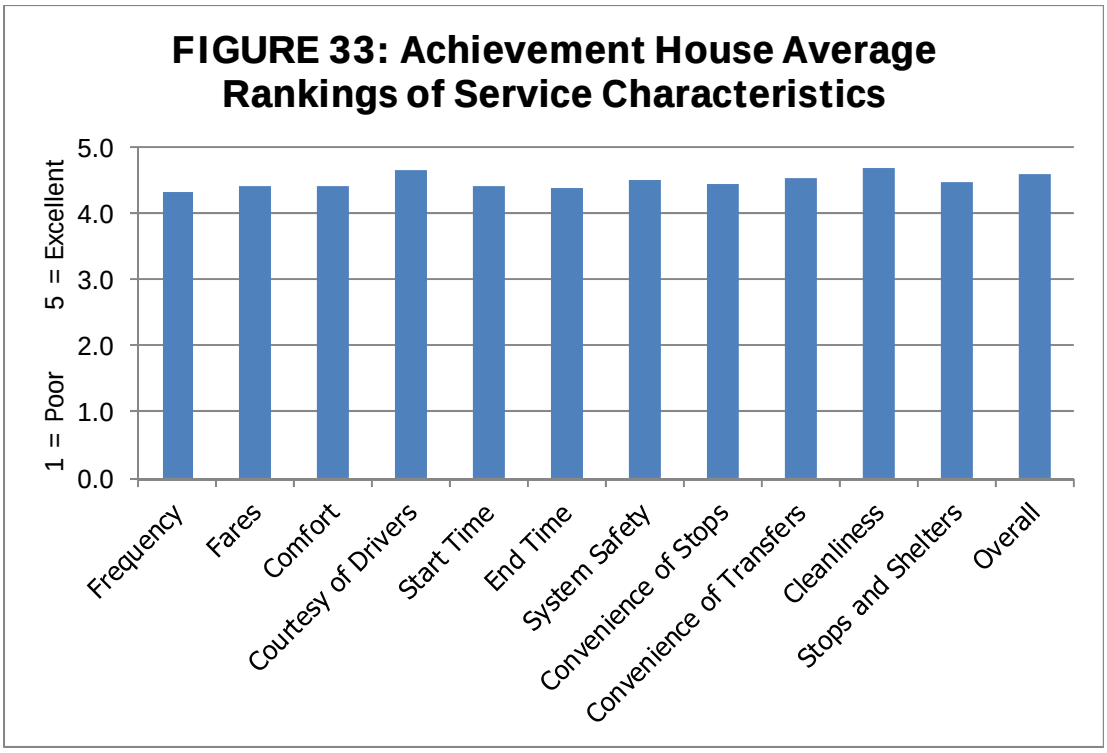
Only three non-transit users completed comment cards. One said they do not know the exact location of services, so they do not use the service. Another said they would like to use the service, but it is not available at their location (Los Osos Valley Road and Madonna). The third respondent said they would use the service if it took less time to get to San Luis Obispo from Arroyo Grande, noting that transit to Cuesta take an hour and a half while driving takes twenty minutes.

ACHIEVEMENT HOUSE OUTREACH

Several of the Route 14 runs operate directly to the Achievement House, which is a training and work center for developmentally disabled adults. Many of these individuals would have difficulty completing onboard surveys, but they are frequent users of the transit system. In an effort to determine if the service is currently meeting their needs, staff from the Achievement House helped individuals complete survey forms, as summarized below.

Input was provided from a total of 14 individuals regarding their use of the RTA services. These passengers all use the service to commute to work at the Achievement House, coming from locations in Morro Bay, Los Osos, San Luis Obispo and Atascadero. All of them said they walked to the bus stop, while two additional individuals said they transferred and one said he biked. Most of the individuals (12) said they use the bus daily, while 2 said they use it 2 to 4 days per week. Only 2 of 13 who responded said they had a car available for the trip. Asked how they would make the trip without a bus available, a few said they would walk or get a ride, but over half said they would not make the trip. The respondents were mostly adults 19 to 61, though two were seniors.

As with other surveys, the individuals from the Achievement House were asked to rank characteristics of the transit system on a scale of one (1) to five (5), with one (1) being poor and five (5) being excellent. The average ranking was 4.6. Individual scores ranged from a low of 4.2 (for fares) to a high of 4.8 (for start times). A summary of responses is shown in Figure 33.



Surveyed individuals were also asked what improvements they would like to see. Five responding that they would like to see buses more often, and two saying they would like to see new routes (one specifying further up El Camino in Atascadero). In particular, one asked for half-hourly headways between SLO and Cuesta College/Achievement House, and three asked for more weekend service. Participants also listed specific comments: the only one received is that the passenger would like to have the bus driver indicate when they would be running late.

Appendix A
Onboard Passenger Survey Instruments and Complete Tallies of Survey Results and Lists of Comments

Forms

This appendix includes onboard opinion survey forms (in English and in Spanish) for:

- RTA Fixed Route Surveys
- Morro Bay Fixed Route Surveys
- Morro Bay Trolley Surveys

Also included in this Appendix are summaries of complete survey results, including the following:

Responses

Summarized by Route and Question

Table A1: RTA Route 12 Survey Results for Questions 1 to 11
Table A2: RTA Route 12 Survey Results for Questions 12 to 20

Table A1: RTA Route 14 Survey Results for Questions 1 to 11
Table A2: RTA Route 14 Survey Results for Questions 12 to 20

Table A1: RTA Route 15 Survey Results for Questions 1 to 11
Table A2: RTA Route 15 Survey Results for Questions 12 to 20

Short Answer Responses by 1) Question #1) and 2) Route

Questions 4, 6, 9, 20 and 21

Morro Bay Trolley Survey Form

Morro Bay Transit is conducting a survey that will be used evaluate and to help improve Trolley services. You can help us by answering the questions below and returning the form to the surveyor as you leave the trolley.

All responses are confidential. Thank you!

1. Which Trolley Route are you on?
   ☐ Waterfront ☐ Downtown ☐ North Morro Bay
2. What time did you board this trolley?
   _____ ☐ AM ☐ PM
3. Where did you get on this trolley?
   Name of trolley stop:_____
   Street: _____
   Cross street: _____
4. How did you get to this trolley?
   ☐ Transferred from another service *(check which one)*
   ☐ Morro Bay Transit ☐ Waterfront Trolley
   ☐ Downtown Trolley ☐ North Morro Bay Trolley
   ☐ RTA *(please list Route # ____)*
   ☐ Walked ☐ Bicycled
   ☐ Drove alone ☐ Was dropped off
   ☐ Other *(explain)* _____
5. What was the main purpose of your trip today?
   ☐ Recreation/Social ☐ Personal Business
   ☐ Shopping ☐ Work
   ☐ Restaurant/Bar ☐ Sightseeing
   ☐ Home/Lodging *(if so, also mark where you went)*
   ☐ Other_____
6. Where will you get off this trolley?
   Name of trolley stop:_____
   Street: _____
   Cross street: _____
7. After you get off this trolley, how will you complete your trip?
   ☐ Transfer to another service (*check which one)*
   ☐ Morro Bay Transit ☐ Waterfront Trolley
   ☐ Downtown Trolley ☐ North Morro Bay Trolley
   ☐ RTA *(please list Route # ____)*
   ☐ Walk ☐ Bicycle ☐ Drive alone
   ☐ Ride with someone
   ☐ Other *(explain)* _____
8. How often do you ride the trolley?
   ☐ 1-4 days/month ☐ 2-4 days/week
   ☐ 1 day/week ☐ First Time
   ☐ Just for short visit to Morro Bay
9. Do you use other area transit services? If so, which ones? *(check all that apply)*
   ☐ Waterfront Trolley ☐ Downtown Trolley
   ☐ North Morro Bay Trolley ☐ Morro Bay Transit
   ☐ RTA Route # _____
   ☐ Other (*please list*) _____
10. What is your primary reason for taking the trolley?
    ☐ Avoid traffic ☐ Save money on driving
    ☐ Avoid driving ☐ Save money/time on parking
    ☐ No car available ☐ I care about the environment
    ☐ It is more convenient ☐ Don't have a driver's license
    ☐ Other *(explain)* _____
11. Are you a resident of Morro Bay or the surrounding area?
    ☐ Yes, full-time ☐ Yes, part-time ☐ Not a resident
12. If you are a resident, what best describes your current work situation?
    ☐ Seasonal/Full time ☐ Seasonal/Part time
    ☐ Year round/Full time ☐ Year Round/Part time
    ☐ Retired
13. What is the zip code of your residence? _ _ _ _ _ _ _
14. Do you require the wheelchair lift to board or exit the trolley? ☐ Yes ☐ No
15. What best describes your annual household income?
    ☐ Less than $20,000 ☐ $20,000 to $50,000
    ☐ $50,000 to $100,000 ☐ Greater than $100,000
16. What is your age?
    ☐ 12 or younger ☐ 13 - 18 ☐ 19 - 24
    ☐ 25 - 61 ☐ 62 - 74 ☐ 75 or older
17. Are you a college student? ☐ Yes ☐ No
18. Please indicate your opinion of the Morro Bay Trolley service from 1 to 5 using the list below *(please circle your answer or leave blank if you have no opinion)*:

	Poor				Excellent
a. Service frequency	1	2	3	4	5
b. Fares	1	2	3	4	5
c. Comfort of ride	1	2	3	4	5
d. Driver Courtesy	1	2	3	4	5
e. Start time of service	1	2	3	4	5
f. End time of service	1	2	3	4	5
g. System safety	1	2	3	4	5
h. Convenience of trolley stops	1	2	3	4	5
i. Convenience of transfers	1	2	3	4	5
j. Trolley cleanliness	1	2	3	4	5
k. Trolley stops and shelters	1	2	3	4	5
l. Overall services	1	2	3	4	5

Do you have any suggestions for improving the trolley service? (extended hours, area served, vehicles, stops, etc.)

_____

Other Comments: _____

Thank you for helping us to improve Morro Bay Trolley Service by participating in this survey!

Morro Bay Transit Survey Form

Morro Bay Transit is conducting a survey that will be used evaluate and to help improve transit services. You can help us by answering the questions below and returning the form to the surveyor as you leave the bus.

All responses are confidential. Thank you!

1. What time did you board this bus?
   _____ ☐ AM ☐ PM
2. Where did you get on this bus?
   Name of bus stop:_____
   Street: _____
   Cross street: _____
3. Where did you just come from?
   ☐ School/College ☐ Work
   ☐ Shopping ☐ Medical/Dental
   ☐ Recreation/Social ☐ Home (if home, also mark where you went)
   ☐ Personal Business
   ☐ Other_____
4. What is the location of where you just came from?
   Major cross streets:_____and_____
   Description *(such as Morro Bay Park)*:_____
5. How did you get to this bus?
   ☐ Transferred from RTA (please list Route # ____)
   ☐ Walked ☐ Bicycled
   ☐ Drove alone ☐ Was dropped off
   ☐ Other *(explain)* _____
6. Where will you get off this bus?
   Name of bus stop:_____
   Street: _____
   Cross street: _____
7. After you get off this bus, how will you complete your trip?
   ☐ Transfer to RTA (please list Route # ____)
   ☐ Walk ☐ Bicycle ☐ Drive alone
   ☐ Ride with someone
   ☐ Other *(explain)* _____
8. Where are you going now?
   ☐ School/College ☐ Work ☐ Home
   ☐ Shopping ☐ Medical/Dental
   ☐ Recreation/Social ☐ Personal Business
   ☐ Other_____
9. What is the location of where you are going now?
   Major cross streets:_____and_____
   Description *(such as Spencers)*: _____
10. How often do you ride the bus?
    ☐ Daily ☐ 1-4 days/month
    ☐ 2-4 days/week ☐ Less than one day/month
    ☐ 1 day/week ☐ First Time
11. Do you use other area transit services? If so, which ones?
    ☐ RTA Route ____ ☐ Runabout
    ☐ Other (*please list*) _____
12. Was there a vehicle that you could have used for this trip instead of the bus? ☐ Yes ☐ No
13. How would you make this trip if MBT was not available? ☐ Ride with someone ☐ Drive my car
    ☐ Taxi ☐ Walk ☐ Bike ☐ Wouldn't make trip
    Other _____
14. Do you have a driver's license? ☐ Yes ☐ No
15. Do you require the wheelchair lift to board or exit the bus? ☐ Yes ☐ No
16. What is your age?
    ☐ 12 or younger ☐ 13 - 18 ☐ 19 - 24
    ☐ 25 - 61 ☐ 62 - 74 ☐ 75 or older
17. Are you a college student? ☐ Yes ☐ No
18. Please indicate your opinion of the Morro Bay Transit service from 1 to 5 using the list below *(please circle your answer or leave blank if you have no opinion)*:

	Poor				Excellent
a. Service frequency	1	2	3	4	5
b. On time performance	1	2	3	4	5
c. Fares	1	2	3	4	5
d. Comfort of ride	1	2	3	4	5
e. Driver Courtesy	1	2	3	4	5
f. Start time of service	1	2	3	4	5
g. End time of service	1	2	3	4	5
h. System safety	1	2	3	4	5
i. Convenience of bus stops	1	2	3	4	5
j. Convenience of transfers	1	2	3	4	5
k. Bus cleanliness	1	2	3	4	5
l. Bus stops and shelters	1	2	3	4	5

19. How do you rate MBT services overall?
    ☐ Poor ☐ Fair ☐ Good ☐ Excellent

20. What service or customer improvements would you like to see?
    ☐ Buses more often – if so, when?_____
    ☐ New or extended service area – if so, where?_____
    ☐ Earlier *Weekday* Service ☐ Later *Weekday* Service ☐ *Saturday* Service ☐ *Sunday* Service
    ☐ Other (*please specify*) _____
21. Other Comments: _____

Thank you for helping us to improve MBT service by participating in this survey!

RTA Fixed Route Survey Form

RTA is conducting a survey that will be used evaluate and to help improve transit services. You can help us by answering the questions below and returning the form to the surveyor as you leave the bus.

All responses are confidential. Thank you!

Please check the route you are on: ☐ *RTA 12* ☐ *RTA 14* ☐ *RTA 15*

1. What time did you board this bus?
   _____ ☐ AM ☐ PM
2. Where did you just come from?
   ☐ School/College ☐ Work
   ☐ Shopping ☐ Medical/Dental
   ☐ Recreation/Social ☐ Home (if home, also mark where you went)
   ☐ Personal Business
   ☐ Other_____
3. What is the location of where you just came from?
   Major cross streets:_____and_____
   Description *(such as Gov't Center)*:_____
4. How did you get to this bus?
   ☐ Walked ☐ Bicycled
   ☐ Drove alone ☐ Was dropped off
   ☐ Other *(explain)* _____
5. Where did you get on this bus?
   Name of bus stop:_____
   Street: _____
   Cross street: _____
6. Where will you get off this bus?
   Name of bus stop:_____
   Street: _____
   Cross street: _____
7. After you get off this bus, how will you complete your trip?
   ☐ Transfer (if transferring, check service) to:
   ☐ RTA Route # ___ ☐ Morro Bay Transit
   ☐ Runabout ☐ Regional Senior Shuttle
   ☐ Cambria Community Bus
   ☐ Walk ☐ Bicycle ☐ Drive alone
   ☐ Ride with someone
   ☐ Other *(explain)* _____
8. Where are you going now?
   ☐ School/College ☐ Work ☐ Home
   ☐ Shopping ☐ Medical/Dental
   ☐ Recreation/Social ☐ Personal Business
   ☐ Other_____
9. What is the location of where you are going now?
   Major cross streets:_____and_____
   Description *(such as Cuesta College)*: _____
10. How often do you ride the bus?
    ☐ Daily ☐ Less than one day/month
    ☐ 1-4 days/month ☐ One day/week
    ☐ 2-4 days/week ☐ First Time
11. Do you use other RTA services? If so, which ones?
    ☐ RTA Route ____
    ☐ Runabout ☐ Other _____
12. Was there a vehicle that you could have used for this trip instead of the bus? ☐ Yes ☐ No
13. Do you have a driver's license? ☐ Yes ☐ No
14. Do you require the wheelchair lift to board or exit the bus? ☐ Yes ☐ No
15. What is your age?
    ☐ 12 or younger ☐ 13 - 18 ☐ 19 - 24
    ☐ 25 - 61 ☐ 62 - 74 ☐ 75 or older
16. Are you a college student? ☐ Yes ☐ No
17. Please indicate your opinion of the fixed route service from 1 to 5 using the list below *(please circle your answer or leave blank if you have no opinion)*:

	Poor				Excellent
a. System safety	1	2	3	4	5
b. On time performance	1	2	3	4	5
c. Service frequency	1	2	3	4	5
d. Driver courtesy	1	2	3	4	5
e. Travel time	1	2	3	4	5
f. Areas served	1	2	3	4	5
g. Bus cleanliness	1	2	3	4	5
h. Telephone information services	1	2	3	4	5
i. Printed information materials	1	2	3	4	5
1. Bus stops and shelters	1	2	3	4	5

18. How do you rate RTA services overall?
    ☐ Excellent ☐ Good ☐ Fair ☐ Poor

19. What service or customer improvements would you like to see?
    ☐ Increased service frequency – if so, when?_____
    ☐ New or extended routes – if so, where?_____
    ☐ Earlier *Weekday* Service ☐ Later *Weekday* Service ☐ Earlier *Saturday* Service ☐ Later *Saturday* Service
    ☐ Sunday Service ☐ Daily Pass ☐ Monthly Student Pass ☐ Other_____
20. Other Comments: _____
    _____
    _____

Thank you for helping us to improve RTA service by participating in this survey!

DRAFT

Appendix A: Responses to Question 6, RTA Fixed Route Survey Results

	6. Where will you get off the bus?			# of
Route	**Bus stop description or**	**Street**	**Cross Street**	**Responses**
12a	Cuesta College			73
12b	SLO Transit Center			68
12a	Morro Bay Park			48
12b	Kennedy Library	Foothill Blvd	Santa Rosa St	17
12b		LOVR	10th St	8
12a	Ralphs	LOVR	Fairchild Wy	6
12X		LOVR	Pine St	5
12b		El Moro Ave	11th St	3
12a		Pine Ave	Loma St	3
12a		Santa Ynez	10th St	3
12a	California Mens Colony			2
12b	Los Osos			2
12X	Baywood Elementary	El Moro	11th St	2
12a	California Mens Colony			2
12b	Los Osos			2
12X		LOVR	10th St	2
12a	San Luis Obispo			2
12b		Hwy 1	Kansas St	2
12a		Ramona Ave	7th St	2
12b		Santa Maria Ave	2nd St	2
12b		Santa Rosa St		2
12a	SLO County Sheriff	Hwy 1	Kansas Ave	1
12a	Atascadero Von's	El Camino Real	Hwy 41	1
12b	Fremont Theatre			1
12a	Los Osos Post Office	LOVR	Sunset Dr	1
12X	Pine & Loma	Pine Ave	Loma St	1
12b	Santa Rosa St			1
12b	Spencer's Market	Hwy 1		1
12a	Tinney Park			1
12b		Burton Dr	Main St	1
12a		El Moro Ave	7th St	1
12a		Ramona Dr	11th St	1
12b		Santa Ysabel	11th St	1
12b		Santa Ysabel Ave	10th St	1
12a		Santa Ysabel St	4th St	1
				270

14	Cuesta College			61
14	Kennedy Library	Foothill Blvd	Santa Rosa St	5
14	SLO Transit Center			4
14		Hwy 1	Kansas Ave	3
14	Cedar Creek	Santa Rosa St	Murray St	1
14		Santa Rosa St	Felton Wy	1
				75

15	Morro Bay Park			3
15	SLO Transit Center			3
15	Burton & Main	Burton Dr	Main St	2
15	Cambria			2
15	Cayucos	Cayucos Dr		2
15	Cuesta College			2
15	Ardath & Green St	Ardath Dr	Green St	1
15	Leffingwell			1
15		Main St	Arlington St	1
15	Morro Bay			1
15	San Simeon			1
				19

Appendix A: Responses to Question 9, RTA Fixed Route Survey Results

9. What is the location of where you are going now?

Route	Street	Cross Street	or Description		# of Responses
RTA 12			Albertson's	Atascadero	1
RTA 12			Atascaero	Atascadero	1
RTA 12	El Camino Real		Vons	Atascadero	1
RTA 12	Burton Dr	Ardath Dr	Cambria	Cambria	1
RTA 12			Cambria	Cambria	2
RTA 12	Hwy 1	Main St		Cambria	1
RTA 12	Main St	Burton Dr		Cambria	1
RTA 12			Cuesta College	Cuesta	70
RTA 12			Los Osos	Los Osos	2
RTA 12	El Moro	South Bay Blvd	Los Osos Middle School	Los Osos	1
RTA 12			Ralphs	Los Osos	1
RTA 12	Bay Oaks Dr	Green Oaks Dr		Los Osos	1
RTA 12	El Moro	12th St		Los Osos	1
RTA 12	El Moro Ave	11th St		Los Osos	1
RTA 12	El Moro Ave	7th St		Los Osos	1
RTA 12	LOVR	10th St		Los Osos	5
RTA 12	LOVR	9th St		Los Osos	1
RTA 12	LOVR	Alexander St		Los Osos	1
RTA 12	LOVR	Doris Ave		Los Osos	1
RTA 12	LOVR	Lilac Dr		Los Osos	1
RTA 12	LOVR	Pine St		Los Osos	2
RTA 12	LOVR	South Bay Blvd		Los Osos	1
RTA 12	Monarch Ln	Humbolt St		Los Osos	1
RTA 12	Nipomo St	8th St		Los Osos	1
RTA 12	Paso Robles Ave	14th St		Los Osos	1
RTA 12	Pecho Valley Rd			Los Osos	1
RTA 12	Pine St	Loma St		Los Osos	1
RTA 12	Pismo Ave	9th St		Los Osos	1
RTA 12	Pismo Ave	9th St		Los Osos	1
RTA 12	Pismo St	17th St		Los Osos	1
RTA 12	Ramona Ave	7th St		Los Osos	2
RTA 12	Ramona Ave	Broderson Ave		Los Osos	1
RTA 12	Ramona Dr	11th St		Los Osos	1
RTA 12	Santa Maria Ave	13th St		Los Osos	1
RTA 12	Santa Maria Ave	2nd St		Los Osos	2
RTA 12	Santa Ynez	Nipomo St		Los Osos	1
RTA 12	Santa Ynez			Los Osos	1
RTA 12	Santa Ysabel	11th St		Los Osos	1
RTA 12	Santa Ysabel Ave	17th St		Los Osos	1
RTA 12	Santa Ysabel St	4th St		Los Osos	1
RTA 12	Main St	San Jacinto St	Beach House Bistro	Morro Bay	1
RTA 12	Main St		Headstart	Morro Bay	1
RTA 12	Fresno Ave		Morro Bay	Morro Bay	1

RTA 12	Main St		Morro Bay	Morro Bay	1
RTA 12			Morro Bay	Morro Bay	2
RTA 12			Morro Bay High School	Morro Bay	1
RTA 12			Morro Bay Park	Morro Bay	12
RTA 12	Fresno Ave			Morro Bay	1
RTA 12	Harbor St	Monterey Ave		Morro Bay	1
RTA 12	Harbor St	Morro Bay Blvd		Morro Bay	1
RTA 12	Hwy 41			Morro Bay	1
RTA 12	Kern Ave	Mesa St		Morro Bay	1
RTA 12	Kern St	Anchor St		Morro Bay	1
RTA 12	Main St	South St		Morro Bay	1
RTA 12	Main St	Tahiti St		Morro Bay	1
RTA 12	Morro Bay Blvd	Market Ave		Morro Bay	1
RTA 12	Morro Bay Blvd			Morro Bay	3
RTA 12	Paula St	Ironwood Ave		Morro Bay	1
RTA 12	Ridgeway St	Bernardo Ave		Morro Bay	1
RTA 12			Pismo Beach Outlets	Oceano	2
RTA 12			Santa Maria	Santa Maria	1
RTA 12			Cal Poly Campus	SLO	8
RTA 12	Hwy 1	Prison Rd	California Mens Colony	SLO	3
RTA 12	Johnson Ave	Bishop St	Community Health Center	SLO	1
RTA 12	Osos St	Palm St	Downtown SLO	SLO	2
RTA 12	Hwy 1	Kansas St	Hwy 1 & Kansas St	SLO	1
RTA 12			Mission View Health Center	SLO	1
RTA 12			Near the Airport	SLO	2
RTA 12			San Luis Obispo	SLO	1
RTA 12			SLO County Jail	SLO	1
RTA 12	Hwy 1	Kansas Ave	SLO County Sheriff	SLO	1
RTA 12			SLO Court Facilities	SLO	1
RTA 12			SLO High School	SLO	1
RTA 12	Osos St	Palm St	SLO Transit Center	SLO	15
RTA 12	Higuera St	High St	Supplies	SLO	1
RTA 12	El Camino Real	Santa Rosa St		SLO	1
RTA 12	Farmhouse Ln	Broad		SLO	1
RTA 12	Foothill Blvd	Santa Rosa St		SLO	9
RTA 12	Foothill Blvd			SLO	3
RTA 12	Higuera St	Broad St		SLO	1
RTA 12	Higuera St	Marsh St		SLO	1
RTA 12	Higuera St	Nipomo St		SLO	1
RTA 12	Higuera St			SLO	1
RTA 12	Johnson Ave			SLO	1
RTA 12	Laurel Ln	Orcutt Rd		SLO	1
RTA 12	Mill St	Johnson Ave		SLO	1
RTA 12	Mill St	Santa Rosa St		SLO	1
RTA 12	Monterey St	Santa Rosa St		SLO	1
RTA 12	Orcutt Rd	Broad St		SLO	1
RTA 12	Orcutt Rd			SLO	1

RTA 12	South St	Broad St		SLO	1
RTA 12	Tank Farm Rd	Broad St		SLO	1
RTA 12	Rd		Leffingwell High School	Templeton	1
RTA 12	Hwy 41	Curbaril Ave		Templeton	1
RTA 12	Main St				2
RTA 12	Nipomo St				1

RTA 14	Hwy 1	Education Dr	Cuesta College	Cuesta	56
RTA 14			Cal Poly Campus	SLO	1
RTA 14			Camp SLO	SLO	1
RTA 14	Foothill Blvd	Santa Rosa St	Mustang Village	SLO	1
RTA 14	Osos St	Palm St	SLO Transit Center	SLO	2
RTA 14	Foothill Blvd	Santa Rosa St		SLO	4
RTA 14	Hwy 1	Kansas Ave		SLO	2

RTA 15	Main St		Cambria	Cambria	1
RTA 15	Main St	Hwy 1	Cambria Grammar School	Cambria	1
RTA 15	Main St	Burton Dr	Dr. Frank Fratto DDS	Cambria	1
RTA 15	Main St	Arlington St		Cambria	1
RTA 15	Main St	Burton Dr		Cambria	1
RTA 15	Main St			Cambria	1
RTA 15	Hwy 1	Education Dr	Cuesta College	Cuesta	4
RTA 15			Morro Bay Park	Morro Bay	1
RTA 15			Hearst Castle	San Simeon	1
RTA 15			Cal Poly Campus	SLO	1
RTA 15	Osos St	Palm St	SLO Transit Center	SLO	1
RTA 15	Higuera St	Suburban Rd		SLO	1

Appendix A: Responses to Question 21, RTA Fixed Route Survey Results

21. Other comments?	Catogorized as…
"Drink holders would be nice and allowing certain drinks aboard would also be awesome. It's a shame to throw out a fresh coffee when one deosn't have a sealed mug."	allow drinks
"Everything should stay the same."	as is
"Keep the same schedule on weekends."	as is
"Allow bikes inside when bike rack is full."	bikes
"Keep the bike racks on but upgrade to the new style on all buses."	bikes
"The 12 should carry 8 bikes and the 15 should carry 6."	bikes
"RTA needs better dispatchers. Need to be friendly."	complaint--dispatchers
"Bus drivers who don't persecute like Jewel, Alan & friends." "Bus drivers Jewel & Sonia are ridiculous."	complaint--drivers
"Buses often do not stop after riders call in."	complaint--drivers
"Counsel internal driver relations; unprofessional; gossip mill!"	complaint--drivers
"Driver training & making uniform rules well understood - some buses/drivers are bumpy & rocky."	complaint--drivers
"Larry is rude! I will wait an hour not to ride his route."	complaint--drivers
"Make a publec list of the drivers schedule becaue some people don't want to run into some drivers."	complaint--drivers
"Some of the drivers are horrendous"	complaint--drivers
"All drivers have been excellent except one."	compliment
"All is well… keep up the good work."	compliment
"Allen is the best bus driver you have"	compliment
"Allen on RTA #12 is a really good bus driver."	compliment
"Always room to improve, but we are doing a great job in this county!"	compliment
"Both Larry and Jules are great drivers!"	compliment
"Buen Servicio"	compliment
"Carlos: Bus driver of the year!"	compliment
"Drivers are first class!!"	compliment
"Drivers are kind & wonderful, much better than the RTA deserves. Also, I recommend the bus often, especially to my friends in Cambria."	compliment
"Give Jewel a raise because she's a great bus driver."	compliment
"Give Jewel a raise"	compliment
"Good job RTA!"	compliment
"Good, Better - Love it…"	compliment
"Great Customer Service"	compliment
"Great job!"	compliment
"I love all the bus drivers! I always feel safe and welcomed."	compliment
"Jewel is an awesome bus driver."	compliment
"Jewel is the best! Good announcements, keeps an eye on everyone! Watch out for her…in a good way!"	compliment
"Keep up the great work!"	compliment
"Most drivers are very good"	compliment
"Overall great service."	compliment
"Respectful, friendly bus drivers on Route #14/#12."	compliment
"RTA #12 - Carlos is excellent, wonderful driver!"	compliment
"RTA gets a 10 from me."	compliment
"Sonia, Jewel and Carlos are the best drivers. They deserve raises."	compliment
"Thank you."	compliment
"Thanks for always getting me to school safely!"	compliment
"Thanks for your services! Much appreciated!!"	compliment
"Thanks"	compliment
"The bus drivers deserve a raise. I've never had such kind service."	compliment
"The driver on this bus is very pleasant & efficient."	compliment
"Usually great service!"	compliment

"Ya do real well due to sewer construction. Please keep trying, you are needed here!"	compliment
"Your bus drivers are amazing!"	compliment
"Some of the drivers are much more pleasant/courteous than others."	drivers
"Buses can run Saturday & Sunday. We need the buses."	extended days
"Keep going 7 days a week."	extended days
"Cheaper fares to Cuesta!"	fares
"Free for students on RTA #12 and #14"	fares
"Students should ride free!"	fares
"It would be nice if the 15 had more runs, hour to hour and later runs or I'd have to walk 3 miles home!" "Morro Bay Transit doesn't run after 6:02! Boo!"	frequency, later MBT hours
"Some bus drivers are extremely polite & some are very rude(depending on the driver)." "Buses should run more often so I don't have to be here early."	frequency
"Bus passes are advertised at $44 but I pay $45." "Keep Cambria routes the same, maybe add more time." "Why do they drive to Hearst Castle when there's no need?" "The schedules/information/service from my dirvers have always been excellent. The drivers are always friendly, helful and are very courteous to all. The girls/persons who answer the phone at your office really need to be knowledgable and aware of where and when of bus routes. They could use more training. Also the buses need to have some type of spray for people that stink!"	info--driver, compliment
"More stops in Los Osos!!"	more stops
"Keeping set arrival time is essential."	on-time
"Please leave on time, not early. I get to the bus stop at 10:44 and the bus is gone when its supposed to leave at :48 after. Please and thank you."	on-time
"RTA 12X 6:45 arrive at SLO Transit Center on time (According to schedule: 7:38AM or earlier)	on-time
"Northbound stops in Morro Bay, especially weekends!!!!"	routing
"Would like to know what has been done regarding bus driver training/overall safety since the accident in Los Osos last year."	safety
"A lot of Cuesta classes start at 8, and we cant use RTA for them now!"	scheduling
"All days of the week connecting travel time with RTA."	scheduling
"Can not get back to Cambria often."	scheduling
"Change it back to the way it was! 1/7/2012!" "Don't fix something that's not broken"	scheduling
"Layover at Morro Bay Park is very annoying - union?"	scheduling
"One more time for 9 south, 9:33. North bound at factory outlets Atascadero	scheduling
"SLO #2 and #3 departures at SLO Transit Center more coordinated with arrival times of RTA #12	scheduling
"Want to see a direct route from Los Osos to SLO; wish had RTA #14 running during summer session; except, for SLO#2 didn't have a gap."	scheduling
"We get out of class at :50 or :20, so it would be awesome if the bus to/from Morro Bay could come at :30 or :00."	scheduling
I can't read the comment that was written… it is something about timing of buses.	scheduling
"Better shelter at Cuesta, it's always windy and cold standing there."	shelter/stops
"Double Decker."	vehicles
"Get rid of window covers!"	vehicles
"Los Osos to SLO (no MB)? & back; maybe use smaller bus w/bike rack"	vehicles
"Old buses are much more comfortable!"	vehicles
"Older buses had comfortable seats; Don't like the new buses"	vehicles
"Propane/Hybrid bus for Cambria!"	vehicles
"Put solar panels on the roof"	vehicles
"Carlos and Alan are odd."	
"I'm only using the MB stop while Los Osos sewer is built. My usual stop would be Santa Ysabel & 15th."	
"Los Osos detours are not RTA's problem."	
"My 'normal' stop is closed due to construction."	
"Tight shifts keep a ship a sail."	
"Will continue riding bus when drivers license is achieved."	

Appendix A: Responses to Question 20, RTA Fixed Route Survey Results

20. Improvements?	*Catogorized as...*	*# of Responses*
More/Better Bike Racks	bike racks	4
More/Better bike racks; Too many bikes don't fit on the Cambria bus	bike racks	1
Fewer drunk teens	comfort	1
"Thank you for being there!"	compliment	1
Cheaper	fares	1
Lower Fares	fares	2
Student discount for RTA	fares	1
If the 12X in the AM would reach the Transit Center on time	on-time	1
Some drivers seem to take their sweet time, making connections harder.	on-time	1
Buy 31-day passes from drivers	pass sales	1
Change back to 1/7/2012 route 12 MB/Los Osos, also the 15 North."	routing	1
Route 12 stop at Cal Poly Campus	routing	1
Service from Morro Bay to Atascadero by 8:30 on weekends - maybe Hwy 41	routing	1
Sevice to Santa Barbara	routing	1
"I look forward to seat belts."	safety	1
The driver should not start driving until all passengers have sat down.	safety	1
"Coordinate and use consistant departure times on the hour."	scheduling	1
"Cuesta arrival times before :30"	scheduling	1
"SLO #3 almost always leaves later and SLO #1 pulls up listed as SLO #3 and often stays that way until departure, so there's two SLO #3."	scheduling	1
"Understand planes vary, but coordinate with train schedule."	scheduling	1
Arrive at Cuesta from Los Osos closer to class times	scheduling	1
Coordinate better with Cuesta class schedule	scheduling	1
Express 10 mins earlier like it used to be	scheduling	1
Fix Saturday service, the 6:00 bus does complete route	scheduling	1
For Cuesta Students, waiting for the bus can change a 1/2 commute to over 2 hours due to the waiting involved (Varies based on class schedule)	scheduling	1
Keep Pinee & LOVR stop during construction	scheduling	1
The times for pickup at Cuesta for RTA #12 are a bit inconvenient	scheduling	1
"Wash bird droppings off benches."	shelters/stops	1
All bus stops should be well covered for the rain.	shelters/stops	1
Bench at Santa Rosa & Foothill Blvd	shelters/stops	1
Bench at Santa Rosa & Foothill Stop; Share RTA stops with SLO Transit at Santa Rosa & Foothill	shelters/stops	1
Bench/Shelter at Santa Rosa & Foothill Blvd	shelters/stops	1
Bench/Shelter at Santa Rosa & Foothill Blvd; would like the bus to leave before 7AM from Morro Bay	shelters/stops, scheduling	1
No smoking at bus stops; shelters at all bus stops	shelters/stops	1
Smoking at bus stops needs to be strictly monitored - awful!	shelters/stops	1
"Small bus with bike rack: Los Osos to SLO (No Morro Bay); Buy 31-day passes from drivers	vehicles, pass sales	1
Cleaner Buses	vehicles	2
Larger buses with more available seats	vehicles	1
Home alone rides for impaired		1

Appendix A: Responses to Question 4, RTA Fixed Route Survey Results

Route	*4. What is the location of where you just came from?* Street	Cross Street	or Description	Community	# of Responses
RTA 12	El Camino Real	Halcyon Rd	Arroyo Grande	Arroyo Grande	1
RTA 12	El Camino Real	Hwy 41	Atascadero City Hall	Atascadero	1
RTA 12			Atascadero Transit Center	Atascadero	2
RTA 12			Atascadero Transit Center	Atascadero	3
RTA 12	Main St	Cambria Rd	Cambria Vets Hal	Cambria	1
RTA 12	Burton Dr	Main St		Cambria	3
RTA 12	Cayucos Dr	Ocean Ave		Cayucos	1
RTA 12	Ocean Ave	4th St		Cayucos	1
RTA 12			Cuesta College	Cuesta	26
RTA 12			Baywood	Los Osos	1
RTA 12	Santa Maria Ave	2nd St	Baywood Market	Los Osos	1
RTA 12	LOVR	Pine St	Church	Los Osos	1
RTA 12			Montana de Oro State Park	Los Osos	1
RTA 12			Vons	Los Osos	1
RTA 12	Bay Oaks Dr	Green Oaks Dr		Los Osos	1
RTA 12	Doris Ave	Highland Dr		Los Osos	1
RTA 12	El Moro	11th St		Los Osos	2
RTA 12	El Moro	12th St		Los Osos	1
RTA 12	El Moro Ave	7th St		Los Osos	2
RTA 12	Los Olivos	S. Bay Blvd		Los Osos	1
RTA 12	Los Olivos Ave	Mountain View Dr		Los Osos	1
RTA 12	Los Olivos Ave			Los Osos	1
RTA 12	LOVR	10th St		Los Osos	4
RTA 12	LOVR	Alexander St		Los Osos	1
RTA 12	LOVR	Buckskin Dr		Los Osos	1
RTA 12	LOVR	Fairchild Wy		Los Osos	1
RTA 12	LOVR	Madonna		Los Osos	1
RTA 12	LOVR	Moutain View Dr		Los Osos	1
RTA 12	LOVR	Palisades Ave		Los Osos	1
RTA 12	LOVR	Pine Dr		Los Osos	1
RTA 12	LOVR	South Bay Blvd		Los Osos	3
RTA 12	Nipomo Ave	13th St		Los Osos	1
RTA 12	Nipomo St	9th St		Los Osos	1
RTA 12	Osos St			Los Osos	1
RTA 12	Paso Robles Ave	14th Street		Los Osos	1
RTA 12	Pecho Valley Rd	Rodman Dr		Los Osos	1
RTA 12	Ramona Ave	11th St		Los Osos	1
RTA 12	Ramona Ave	7th		Los Osos	1
RTA 12	Santa Maria Ave	2nd St		Los Osos	1
RTA 12	Santa Maria Ave	8th St		Los Osos	1
RTA 12	Santa Maria St	13th Street		Los Osos	1
RTA 12	Santa Ysabel	13th Street		Los Osos	1
RTA 12	Woodland Dr	Palisades Ave		Los Osos	1
RTA 12	Hwy 41	Hwy 1	Cheveron Gas Station	Morro Bay	1
RTA 12			Morro Bay	Morro Bay	1
RTA 12			Morro Bay High School	Morro Bay	2
RTA 12			Morro Bay High School	Morro Bay	3
RTA 12			Morro Bay Park	Morro Bay	5
RTA 12			Morro Bay Thrift	Morro Bay	1

RTA 12	Quintana Rd	Chorro Creek Rd	Ranch	Morro Bay	1
RTA 12	Main St	Elena St	Spencer's Market	Morro Bay	1
RTA 12			Vinyl Isle	Morro Bay	1
RTA 12	Beach St	Main St		Morro Bay	1
RTA 12	Binscarth Rd	Fern Ave		Morro Bay	1
RTA 12	Damar St	Sandalwood Ave		Morro Bay	1
RTA 12	Embarcadero			Morro Bay	1
RTA 12	Estero Ave	Marina St		Morro Bay	1
RTA 12	Harbor Ave			Morro Bay	1
RTA 12	Harbor St	Piney Wy		Morro Bay	1
RTA 12	Island St	Coral Ave		Morro Bay	1
RTA 12	Kern Ave			Morro Bay	1
RTA 12	Kings Ave	Pacific St		Morro Bay	1
RTA 12	Main St	Luzon St		Morro Bay	1
RTA 12	Mindoro St	Main St		Morro Bay	1
RTA 12	Morro Bay Blvd	Piney Wy		Morro Bay	1
RTA 12	Morro Bay Blvd	Shasta Ave		Morro Bay	1
RTA 12	Morro Bay Blvd	Kern Ave		Morro Bay	1
RTA 12	Morro Bay Park			Morro Bay	3
RTA 12	Morro Rd	Beach St		Morro Bay	1
RTA 12	Morro St	Islay St		Morro Bay	1
RTA 12	Pecho St	Kings Ave		Morro Bay	1
RTA 12	Quintana Rd	Main St		Morro Bay	1
RTA 12	Quintana Rd	South Bay Blvd		Morro Bay	2
RTA 12	South St	King St		Morro Bay	1
RTA 12	Tefft St	Carilllo St		Nipomo	1
RTA 12			Pismo Outlets	Oceano	2
RTA 12			Paso Robles	Paso Robles	2
RTA 12	Pine St	8th St	Paso Transit Center	Paso Robles	2
RTA 12	Boon St	Broadway	Santa Maria	Santa Maria	1
RTA 12	Enos	Wallos	Santa Maria	Santa Maria	1
RTA 12			Santa Maria	Santa Maria	1
RTA 12	Donovan Rd	Pepperwood		Santa Maria	1
RTA 12	Morro Rd	Monterey St	Anderson Hotel	SLO	1
RTA 12	Orcutt Rd	Laurel Ln	Atoll Center	SLO	1
RTA 12			Cal Poly Campus	SLO	7
RTA 12	Higuera St	Madonna Rd	Caltrans Office	SLO	1
RTA 12	Foothill Blvd	Santa Rosa St	Chevron Gas Station	SLO	1
RTA 12	Higuera St	Chorro St	Chipotle	SLO	1
RTA 12	Higuera St	Margarita Ave	DMV	SLO	2
RTA 12	Ella St	Johnson Ave	French Hospital	SLO	1
RTA 12			Kennedy Library	SLO	3
RTA 12	Foothill Blvd	Santa Rosa St	Mustang Village	SLO	3
RTA 12	Palm St	Morro St	Palm Theatre	SLO	1
RTA 12	Osos St	Church St	Sally Loos Wholesome Café	SLO	1
RTA 12	Foothill Blvd	Murray St	Sierra Vista Regional Medical	SLO	1
RTA 12			SLO Airport	SLO	1
RTA 12	Mill St	Santa Rosa St	SLO Court Facilities	SLO	2
RTA 12	Osos St	Palm St	SLO Transit Center	SLO	24
RTA 12	California Ave	Stafford St		SLO	1
RTA 12	Foothill Blvd	California Ave		SLO	1
RTA 12	Foothill Blvd	Patricia Dr		SLO	1
RTA 12	Foothill Blvd	Santa Rosa St		SLO	3

RTA 12	Foothill Blvd			SLO	1
RTA 12	Higuera St	Madonna Rd		SLO	2
RTA 12	Higuera St	Marsh St		SLO	2
RTA 12	Higuera St	Nipomo St		SLO	1
RTA 12	Higuera St	Pismo St		SLO	1
RTA 12	Higuera St	South St		SLO	1
RTA 12	Higuera St			SLO	1
RTA 12	Industrial Wy	Sacramento Dr		SLO	1
RTA 12	Johnson Ave	Bishop St		SLO	1
RTA 12	Laurel Ln	Augusta St		SLO	1
RTA 12	McMillan Ave			SLO	1
RTA 12	Mill St	Johnson St		SLO	1
RTA 12	Monterey Ave	Pacific St		SLO	1
RTA 12	Pacific St	Bernardo Ave		SLO	1
RTA 12	Palm St	Johnson Ave		SLO	1
RTA 12	Pine St	Ash St		SLO	1
RTA 12	Pismo St			SLO	1
RTA 12	Tank Farm Rd	Broad St		SLO	3
RTA 12	Las Tablas Rd		Templeton Park & Ride	Templeton	2
RTA 12	Rec Trail				1
RTA 14	Halcyon Rd		Arroyo Grande	Arroyo Grande	1
RTA 14	Hwy 1	Education Dr	Cuesta College	Cuesta	6
RTA 14	LOVR	Diablo Dr		Los Osos	7
RTA 14			Cal Poly Campus	SLO	1
RTA 14	Foothill Blvd	Santa Rosa St	Chevron Gas Station	SLO	1
RTA 14	Santa Rosa St	Foothill Blvd	Mustang Village	SLO	7
RTA 14			SLO Transit Center	SLO	5
RTA 14	Foothill Blvd	Santa Rosa St	Stenner Glen	SLO	1
RTA 14	Broad St	Santa Barabara St		SLO	1
RTA 14	Broad St	Tank Farm Rd		SLO	1
RTA 14	Broad St			SLO	2
RTA 14	California Blvd	Hathaway Ave		SLO	3
RTA 14	California Blvd	Stafford St		SLO	1
RTA 14	Chorro St	Foothill Blvd		SLO	1
RTA 14	Chorro St	Meinecke Ave		SLO	1
RTA 14	College	Paso Robles		SLO	1
RTA 14	Craig Way			SLO	1
RTA 14	Felton Wy	Ferini Rd		SLO	1
RTA 14	Foothill Blvd	California Blvd		SLO	3
RTA 14	Foothill Blvd	Jeffry Dr		SLO	1
RTA 14	Foothill Blvd	Patricia Dr		SLO	1
RTA 14	Foothill Blvd	Santa Rosa St		SLO	5
RTA 14	Foothill Blvd			SLO	2
RTA 14	Johnson Ave	Laurel Ln		SLO	1
RTA 14	Laurel Ln	Augusta St		SLO	1
RTA 14	Mill St	Morro St		SLO	1
RTA 14	Murray St	Stenner St		SLO	1
RTA 14	Ramona Dr	Palomar Ave		SLO	1
RTA 14	Las Tablas Rd	Bennett Wy	Las Tablas Park & Ride	Templeton	1

RTA 15			Baywood Park	Baywood	1
RTA 15	Ardath Dr			Cambria	1

RTA 15	Burton Dr	Hwy 1		Cambria	1
RTA 15	Moonstone Dr			Cambria	1
RTA 15	Cayucos Dr	Ocean Front Ave	Cayucos Pier	Cayucos	1
RTA 15	LOVR	9th St		Los Osos	1
RTA 15	LOVR	Pine St		Los Osos	1
RTA 15	Berwick Dr	Dreydon Dr		Morro Bay	1
RTA 15	Quintana Rd	South Bay Blvd		Morro Bay	1
RTA 15	Palm St	Osos St	SLO Transit Center	SLO	1
RTA 15	Johnson Ave	Mill St		SLO	1
RTA 15	Richard Ave	Stuart Dr			1
RTA 15	South Ocean	6th St			1

TABLE A5: Responses for RTA Route 15 Onboard Surveys
Questions 1 to 8

Questions	Answers								
Q1. What time did you board the bus?	**6-7 AM**	**7-8 AM**	**8-9 AM**	**9-10 AM**	**10-11 AM**	**11 AM - 12 PM**	**12-1 PM**	**1-2 PM**	**2-3 PM**
Number of Respondents	2	9	6	1	2	7	2	0	7
Percent of Respondents	5%	22%	15%	2%	5%	17%	5%	0%	17%
	3-4 PM	**4-5 PM**	**5-6 PM**		**AM**	**PM**	**SUM**		
Number of Respondents	2	0	3		27	14	**41**		
Percent of Respondents	5%	0%	7%	0%	66%	34%			
Q3. Where did you just come from?	**School/College**		**Work**		**Shopping**		**Medical/Dental**		
Number of Responses	3		4		2		0		
Percent of Responses	7%		9%		4%		0%		
	Rec/Social		**Home**		**Personal**		**Other**		**SUM**
Number of Respondents	1		31		3		2		**46**
Percent of Respondents	2%		67%		7%		4%		
Q5. How did you get to the bus?	**Transferred**		**Walked**		**Biked**		**Drove Alone**		
Number of Responses	9		21		6		1		
Percent of Responses	22%		51%		15%		2%		
	Dropped off		**Other**		**SUM**				
Number of Respondents	3		1		**41**				
Percent of Respondents	7%		2%						
Q5. If transferred, to which route?	**RTA 12**	**RTA 15**	**MBT**	**SUM**					
Number of Responses	7	3	1	11					
Percent of Responses	64%	27%	9%						
Q7. How will you complete your trip?	**Transfer**		**Walk**		**Bicycle**		**Drive Alone**		
Number of Responses	17		20		2		1		
Percent of Responses	40%		48%		5%		2%		
	Get Dropped Off		**Other**		**SUM**				
Number of Respondents	2		0		**42**				
Percent of Respondents	5%		0%						
Q7. To which route will you transfer?	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**MBT**	**SUM**			
Number of Responses	1	7	0	6	1	15			
Percent of Responses	9%	64%	0%	55%	9%				
Q8. Where are you going	**School/College**		**Work**		**Home**		**Shopping**		
Number of Responses	8		15		4		3		
Percent of Responses	19%		36%		10%		7%		
	Medical/Dental		**Rec/Social**		**Personal**		**Other**		**SUM**
Number of Respondents	2		4		3		3		**42**
Percent of Respondents	5%		10%		7%		7%		

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.

TABLE A4: Responses for RTA Route 14 Onboard Surveys
Questions 12 to 20

Questions **Answers**

Q10. How often do you ride the bus?	**Daily**	**2-4 days/week**	**1 day/week**	**1-4 days/mo**
Number of Respondents	47	29	0	1
Percent of Respondents	60%	37%	0%	1%
	< 1 day/mo	**First Time**	**SUM**	
Number of Respondents	0	1	78	
Percent of Respondents	0%	1%	100%	

Q11. Do you use other transit services?	**Yes**	**No**	**SUM**
Number of Respondents	47	31	**78**
Percent of Respondents	60%	40%	

Q11. If so, which ones?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**	**DAR**	
Number of Responses	5	10	18	4	0	0	1	0	
Percent of Responses	6%	11%	21%	5%	0%	0%	1%	0%	
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SLO**	**Other**	**SUM**
Number of Respondents	5	6	7	13	10	6	1	1	87
Percent of Respondents	6%	7%	8%	15%	11%	7%	1%	1%	

Q12. Car available for trip?	**Yes**	**No**	**SUM**	**Q14. Have driver's license?**	**Yes**	**No**	**SUM**
Number of Respondents	19	56	**75**	Number of Respondents	49	28	**77**
Percent of Respondents	25%	75%		Percent of Respondents	64%	36%	

Q13. How else would you make trip?	**Get a Ride**	**Drive my car**	**Taxi**	**Walk**
Number of Responses	37	9	5	1
Percent of Responses	42%	10%	6%	1%
	Bike	**No trip**	**Other**	**SUM**
Numer of Respondents	14	22	0	**88**
Percent of Respondents	16%	25%	0%	

Q15. Use WC lift?	**Yes**	**No**	**SUM**	**Q17: College student?**	**Yes**	**No**	**SUM**
Number of Respondents	0	75	**75**	Number of Respondents	68	4	**72**
Percent of Respondents	0%	100%		Percent of Respondents	94%	6%	

Q16. Age group?	**< 12**	**13-18**	**19-24**	**25-61**	**62-74**	**75+**	**SUM**
Number of Respondents	0	11	53	14	0	0	**78**
Percent of Respondents	0%	14%	68%	18%	0%	0%	

Q18. Opinion of Service?	**1**	**2**	**3**	**4**	**5**	**Average**
Frequency	2	2	16	28	25	4.0
On-time	1	3	12	23	36	4.2
Fares	1	8	33	17	14	3.5
Comfort	1	2	15	35	23	4.0
Courtesy of Drivers	0	0	16	30	29	4.2
Start Time	0	2	16	30	25	4.1
End Time	2	6	15	31	20	3.8
System Safety	0	0	12	31	30	4.2
Convenience of Stops	1	4	17	29	24	3.9
Convenience of Transfers	0	3	9	28	30	4.2
Cleanliness	1	3	13	28	31	4.1
Stops and Shelters	0	2	20	33	21	4.0

Q19. Overall Ranking?	**Poor**	**Fair**	**Good**	**Excellent**	**SUM**
Number of Respondents	1	11	37	27	**76**
Percent of Respondents	1%	14%	49%	36%	

Q20: Service Improvements?	**Frequency**	**New/Extended**	**Earlier Weekday**	**Later Weekday**
Number of Responses	32	10	4	18
Percent of Responses	39%	12%	5%	22%
	Earlier Saturday	**Later Saturday**	**Other**	**SUM**
Numer of Respondents	3	13	3	**83**
Percent of Respondents	4%	16%	4%	

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.

TABLE A3: Responses for RTA Route 14 Onboard Surveys
Questions 1 to 8

Questions **Answers**

Q1. What time did you board the bus?	**6-7 AM**	**7-8 AM**	**8-9 AM**	**9-10 AM**	**10-11 AM**	**11 AM - 12 PM**	**12-1 PM**	**1-2 PM**	**2-3 PM**
Number of Respondents	0	2	27	20	20	1	0	0	0
Percent of Respondents	0%	3%	39%	29%	29%	1%	0%	0%	0%
	3-4 PM	**4-5 PM**	**5-6 PM**	**6-7 PM**	**AM**	**PM**	**SUM**		
Number of Respondents	0	0	0	0	70	0	**70**		
Percent of Respondents	0%	0%	0%	0%	100%	0%			

Q3. Where did you just come from?	**School/College**	**Work**	**Shopping**	**Medical/Dental**	
Number of Responses	22	1	0	0	
Percent of Responses	28%	1%	0%	0%	
	Rec/Social	**Home**	**Personal**	**Other**	**SUM**
Number of Respondents	0	56	0	0	**79**
Percent of Respondents	0%	71%	0%	0%	

Q5. How did you get to the bus?	**Transferred**	**Walked**	**Biked**	**Drove Alone**
Number of Responses	16	43	12	0
Percent of Responses	20%	54%	15%	0%
	Dropped off	**Other**	**SUM**	
Number of Respondents	7	2	**80**	
Percent of Respondents	9%	3%		

Q5. If transferred, to which route?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**
Number of Responses	2	2	3	0	0	6	0
Percent of Responses	11%	11%	16%	0%	0%	32%	0%
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SUM**
Number of Respondents	2	0	2	1	1	0	19
Percent of Respondents	11%	0%	11%	5%	5%	0%	

Q7. How will you complete your trip?	**Transfer**	**Walk**	**Bicycle**	**Drive Alone**
Number of Responses	19	49	4	0
Percent of Responses	26%	66%	5%	0%
	Get Dropped Off	**Other**	**SUM**	
Number of Respondents	1	1	**74**	
Percent of Respondents	1%	1%		

Q7. To which route will you transfer?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**
Number of Responses	0	3	7	3	0	0	0
Percent of Responses	0%	16%	37%	16%	0%	0%	0%
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SUM**
Number of Respondents	0	0	1	1	0	0	15
Percent of Respondents	0%	0%	5%	5%	0%	0%	

Q8. Where are you going	**School/College**	**Work**	**Home**	**Shopping**	
Number of Responses	61	4	10	0	
Percent of Responses	78%	5%	13%	0%	
	Medical/Dental	**Rec/Social**	**Personal**	**Other**	**SUM**
Number of Respondents	1	0	2	0	**78**
Percent of Respondents	1%	0%	3%	0%	

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.

TABLE A1: Responses for RTA Route 12 Onboard Surveys
Questions 1 to 8

Questions	Answers								
Q1. What time did you board the bus?	**6-7 AM**	**7-8 AM**	**8-9 AM**	**9-10 AM**	**10-11 AM**	**11 AM - 12 PM**	**12-1 PM**	**1-2 PM**	**2-3 PM**
Number of Respondents	16	36	20	31	9	28	11	12	11
Percent of Respondents	7%	15%	8%	13%	4%	12%	5%	5%	5%
	3-4 PM	**4-5 PM**	**5-6 PM**	**6-7 PM**	**7-8 PM**	**8-9 PM**	**AM**	**PM**	**SUM**
Number of Respondents	5	18	28	8	1	4	140	98	**238**
Percent of Respondents	2%	8%	12%	3%	0%	2%	59%	41%	
Q3. Where did you just come from?	**School/College**		**Work**		**Shopping**		**Medical/Dental**		
Number of Responses	44		48		5		5		
Percent of Responses	17%		18%		2%		2%		
	Rec/Social		**Home**		**Personal**		**Other**		**SUM**
Number of Respondents	14		133		15		1		**265**
Percent of Respondents	5%		50%		6%		0%		
Q5. How did you get to the bus?	**Transferred**		**Walked**		**Biked**		**Drove Alone**		
Number of Responses	77		121		41		1		
Percent of Responses	29%		46%		16%		0%		
	Dropped off		**Other**		**SUM**				
Number of Respondents	20		4		**264**				
Percent of Respondents	8%		2%						
Q5. If transferred, to which route?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**		
Number of Responses	14	21	9	3	6	19	6		
Percent of Responses	16%	24%	10%	3%	7%	21%	7%		
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SUM**		
Number of Respondents	2	1	4	0	3	1	89		
Percent of Respondents	2%	1%	4%	0%	3%	1%			
Q7. How will you complete your trip?	**Transfer**		**Walk**		**Bicycle**		**Drive Alone**		
Number of Responses	72		154		24		2		
Percent of Responses	27%		59%		9%		1%		
	Get Dropped Off		**Other**		**SUM**				
Number of Respondents	8		3		**263**				
Percent of Respondents	3%		1%						
Q7. To which route will you transfer?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**		
Number of Responses	10	7	20	3	8	14	2		
Percent of Responses	11%	8%	22%	3%	9%	16%	2%		
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SUM**		
Number of Respondents	0	0	9	0	0	1	74		
Percent of Respondents	0%	0%	10%	0%	0%	1%			
Q8. Where are you going now?	**School/College**		**Work**		**Home**		**Shopping**		
Number of Responses	74		59		94		5		
Percent of Responses	28%		22%		35%		2%		
	Medical/Dental		**Rec/Social**		**Personal**		**Other**		**SUM**
Number of Respondents	6		9		16		4		**267**
Percent of Respondents	2%		3%		6%		1%		

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.

TABLE A2: Responses for RTA Route 12 Onboard Surveys
Questions 10 to 20

Questions | **Answers**

Q10. How often do you ride the bus?	**Daily**	**2-4 days/week**	**1 day/week**	**1-4 days/mo**
Number of Respondents	126	110	6	15
Percent of Respondents	47%	41%	2%	6%
	< 1 day/mo	**First Time**	**SUM**	
Number of Respondents	6	3	266	
Percent of Respondents	2%	1%		

Q11. Do you use other transit services?	**Yes**	**No**	**SUM**
Number of Respondents	168	95	**263**
Percent of Respondents	64%	36%	

Q11. If so, which ones?	**RTA 9**	**RTA 10**	**RTA 12**	**RTA 14**	**RTA 15**	**RTA**	**MBT**	**DAR**	
Number of Responses	36	39	25	19	15	11	25	4	
Percent of Responses	12%	13%	8%	6%	5%	4%	8%	1%	
	SLO 1	**SLO 2**	**SLO 3**	**SLO 4**	**SLO 5**	**SLO 6**	**SLO**	**Other**	**SUM**
Number of Respondents	10	15	25	26	28	14	9	8	309
Percent of Respondents	3%	5%	8%	8%	9%	5%	3%	3%	

Q12. Car available for trip?	**Yes**	**No**	**SUM**	**Q14. Have driver's license?**	**Yes**	**No**	**SUM**
Number of Respondents	100	163	**263**	Number of Respondents	164	98	**262**
Percent of Respondents	38%	62%		Percent of Respondents	63%	37%	

Q13. How else would you make trip?	**Get a Ride**	**Drive my car**	**Taxi**	**Walk**
Number of Responses	113	63	6	20
Percent of Responses	35%	20%	2%	6%
	Bike	**No trip**	**Other**	**SUM**
Numer of Respondents	35	77	8	**322**
Percent of Respondents	11%	24%	2%	

Q15. Use WC lift?	**Yes**	**No**	**SUM**	**Q17: College student?**	**Yes**	**No**	**SUM**
Number of Respondents	1	264	**265**	Number of Respondents	104	139	**243**
Percent of Respondents	0%	100%		Percent of Respondents	43%	57%	

Q16. Age group?	**< 12**	**13-18**	**19-24**	**25-61**	**62-74**	**75+**	**SUM**
Number of Respondents	1	34	93	120	18	0	**266**
Percent of Respondents	0%	13%	35%	45%	7%	0%	

Q18. Opinion of Service?	**1**	**2**	**3**	**4**	**5**	**Average**
Frequency	4	22	75	88	72	3.8
On-time	6	8	30	105	116	4.2
Fares	7	22	91	82	61	3.6
Comfort	2	12	85	97	65	3.8
Courtesy of Drivers	5	12	36	75	135	4.2
Start Time	4	12	54	96	92	4.0
End Time	10	19	71	90	65	3.7
System Safety	1	8	36	108	100	4.2
Convenience of Stops	5	20	70	97	70	3.8
Convenience of Transfers	8	13	53	93	73	3.9
Cleanliness	4	8	50	108	91	4.0
Stops and Shelters	12	25	76	87	56	3.6

Q19. Overall Ranking?	**Poor**	**Fair**	**Good**	**Excellent**	**SUM**
Number of Respondents	3	30	149	71	**253**
Percent of Respondents	1%	12%	59%	28%	

Q20: Service Improvements?	**Frequency**	**New/Extended**	**Earlier Weekday**	**Later Weekday**
Number of Responses	121	46	28	49
Percent of Responses	35%	13%	8%	14%
	Earlier Saturday	**Later Saturday**	**SUM**	
Numer of Respondents	42	58	**344**	
Percent of Respondents	12%	17%		

Source: Data collected April 23, 2013. LSC Transportation Consultants, Inc.

Appendix B
Sample Boarding and Alighting and On-time Performance Forms

Forms

This appendix includes examples of boarding and alighting forms and on-time performance forms for the following survey efforts:

- Boarding/Alighting Route 12
- On-time Route 12
- Boarding/Alighting Route 14
- On-time Route 14
- Boarding/Alighting Route 15
- On-time Route 15
- Boarding/Alighting Morro Bay Transit
- On-time Morro Bay Transit
- Boarding/Alighting Morro Bay Trolley, North Route
- Boarding/Alighting Morro Bay Trolley, Downtown Route
- Boarding/Alighting Morro Bay Trolley, Waterfront Route

Responses

Detailed Responses of boarding and alighting by stop for:

- RTA Route 12
- RTA Route 14
- RTA Route 15
- Morro Bay Transit

Appendix B: Total Boardings and Alightings by Stop, RTA Route 15

Daily Boardings/Alightings April 23, 2013	TOTAL		
Stop	**On**	**Off**	**Total**
Hearst Castle Visitor Center	1	0	1
Sebastian's Café (SB)	0	0	0
Hearst Drive at San Simeon	3	0	3
Moonstone @ San Simeon Pines Lodge	0	0	0
Moonstone Beach Drive 1	0	0	0
Moonstone Beach Drive 2	0	0	0
Moonstone Beach Drive 3	0	0	0
Moonstone at Windsor	0	0	0
Main (Cambria)	1	0	1
Main at Vets Hall	1	2	3
Main	1	0	1
Main @ Bluebird Inn	2	1	3
Burton at Main Street	23	1	24
Burton at Cambria Pines Lodge (across)	1	0	1
Burton at Burton Circle	0	0	0
Burton at Ardath	0	1	1
Ardath at Highway 1	1	0	1
Ocean at Cayucos Pier	2	3	5
Ocean & 3rd	8	3	11
Ocean and 9th	0	0	0
South Ocean at Old Creek	1	1	2
Highway 1 at San Jacinto	1	2	3
Morro Bay Park	33	33	66
South Ocean at Old Creek	0	2	2
Ocean at 8th	0	3	3
Ocean at 4th	0	3	3
Cayucos at Ash	5	2	7
Ardath at Highway 1	1	3	4
Burton at Ardath	0	0	0
Burton at Burton Circle	0	4	4
Burton at Cambria Pines Lodge	0	1	1
Burton at Main Street	12	12	24
Main @ Bluebird Inn	0	1	1
Main	0	2	2
Main at Vets Hall	2	0	2
Main	0	1	1
Moonstone at Windsor	0	0	0
Moonstone Beach Drive 3	0	1	1
Moonstone Beach Drive 2	0	0	0
Moonstone Beach Drive 1	0	0	0
Castillo at Otter	0	4	4
Sebastian's Café (SB)	0	0	0
Hearst Visitor Center	0	4	4
Total	99	90	189

Appendix B: Total Boardings and Alightings by Stop, RTA Route 14

Daily Boardings/Alightings, April-May, 2013			
RTA Route 14 NB to Cuesta B&A	**TOTAL**		
Stop	**On**	**Off**	**Total**
Gov't Center SLO	34	0	34
Santa Rosa @ Murray	0		0
Santa Rosa @ Mstng / Stenner Glen	52	1	53
CA Men's Colony (On Call)	0	0	0
Kansas @ Highway 1	0	0	0
Cuesta College	3	63	66
Achievement House	0	16	16
Total	***89***	***80***	***169***

RTA Route 14 SB to Gov't Ctr B&A	**TOTAL**		
Stop	**On**	**Off**	**Total**
Cuesta College	7	0	7
Kansas @ Highway 1	0	0	0
CA Men's Colony (On Call)	2	0	2
Santa Rosa at Foothill	0	3	3
Santa Rosa at Murray	0	2	2
Gov't Center SLO	0	4	4
Total	*9*	*9*	*18*

Appendix B: Total Boardings and Alightings by Stop, RTA Route 12

Average of One Day of Boardings/Alightings, counted Week of April 23-May 2, 2013

	TOTAL		
Stop	**On**	**Off**	**Total**
Gov't Center SLO	258	0	258
Santa Rosa @ Murray	20	2	22
Santa Rosa @ Mstng / Stener Glen	35	4	39
CA Men's Colony (On Call)	1	1	2
Kansas @ Highway 1 (on call)	0	4	4
Cuesta College	36	177	213
Morro Bay Park	31	82	113
South Bay @ Quintana	2	1	3
LOVR @ Ralphs	11	30	41
LOVR @ Vons	0	28	28
LOVR at Palisades	0	1	1
Pine at LOVR	11	19	30
Pine at Loma	8	5	13
Ramona @ 7th	0	5	5
7th at El Morro	4	5	9
2nd at Santa Maria	16	8	24
Santa Ysabel at 7th	3	4	7
11th @ Santa Ysabel (temporary)	3	1	4
11th @ El Moro	7	12	19
11th @ Ramona	4	1	5
10th at LOVR	31	16	47
LOVR @ Post Office (across from Ralphs)	9	1	10
South Bay at Quintana	1	0	1
Morro Bay Park	94	44	138
Cuesta College	187	38	225
Kansas @ Highway 1 (on call)	14	0	14
CA Men's Colony (On Call)	0	2	2
Santa Rosa at Foothill	3	70	73
Santa Rosa at Murray	0	0	0
Gov't Center SLO	0	239	239
Total	789	800	1,589

Appendix B: Total Boardings and Alightings by Stop, Morro Bay Transit

Daily Boardings/Alightings April 23, 2013	TOTAL		
Stop	**On**	**Off**	**Total**
1. Main at Bonita	1	0	1
Mimosa St at Hill St	1	0	1
Main at Las Vegas (Flag Stop)	1	0	1
2. Main at Spencer's Market	4	4	8
Elena at Elm (Flag Stop)	3	0	3
Greenwood at Elena (Flag Stop)	2	1	3
Greenwood at San Jacinto	0	3	3
3. Main at Sequoia	6	2	8
4. Main at Jamaica	0	0	0
Main & Mindoro	0	1	1
Main & Panay	1	1	2
5. Main at Tahiti	2	2	4
6. Beachcomber at Mindoro	1	0	1
Beachcomber at Java (Flag Stop)	1	0	1
Main & Mindoro	1	0	1
Main & Piney	1	0	1
Sandalwood & Damar	0	1	1
7. Sandalwood at San Jacinto	1	1	2
Greenwood at San Jacinto	0	4	4
Elm & San Jacinto	1	0	1
8. Atascadero at 200 Block (Teen Center; HS)	1	1	2
Main at Atascadero Rd (Flag Stop)	0	1	1
9. Atascadero at Morro Dunes	0	0	0
41 at Main (Flag Stop)	1	0	1
10. Atascadero at 300 Block (Motel 6)	0	0	0
11. Quintana at Cookie Crock	1	12	13
Quintana at Main	0	2	2
12. Quintana at Albertson's	7	9	16
Achievement House	0	1	1
13. City Park at Harbor (RTA stop)	3	8	11
Ridgeway at Kern (Dial-A-Ride)	0	1	1
Pacific St & Kings Ave	0	2	2
No Stop Location Information	1	0	1
14. Piney Way at Anchor	0	1	1
Anchor & Main	2	0	2
15. Market at Morro Bay Blvd.	0	0	0
16. Community Center/Senior Center	8	1	9
Harbor Wy	1	0	1
Harbor Wy & Napa	2	0	2
Mimosa & Hill St (Dial-A-Ride)	2	0	2
Main & Las Vegas	2	0	2
17. Main at Errol	0	1	1
Mimosa & Hill St (Dial-A-Ride)	0	1	1
Main & 41 (Dial-A-Ride)	0	1	1
1. Main at Bonita	1	3	4
Total	*59*	*65*	*124*

Appendix C
Sample Transfer Survey Forms

This appendix includes examples of the transfer forms used to count transfers at the SLO Transit and RTA Transit stops located at Osos Street and Palm Street in downtown San Luis Obispo.

Transfers to RTA 12 and 14

Surveyor Name: _____ Date: _____

Start Time _____ am/pm

Scheduled Buses			Transferring From…										
Arrival Time	Departure Time	Transferring To	SLO 1	SLO 2	SLO 3	SLO 4	SLO 5	SLO 6a	SLO 6b	RTA 9	RTA 10	RTA 12	RTA 14
:00	:03	RTA 14											
:22	:33	RTA 9											
:25	:33	RTA 12											
:28	:33	RTA 10											

Start Time _____ am/pm

Scheduled Buses			Transferring From…										
Arrival Time	Departure Time	Transferring To	SLO 1	SLO 2	SLO 3	SLO 4	SLO 5	SLO 6a	SLO 6b	RTA 9	RTA 10	RTA 12	RTA 14
:00	:03	RTA 14											
:22	:33	RTA 9											
:25	:33	RTA 12											
:28	:33	RTA 10											

Start Time _____ am/pm

Scheduled Buses			Transferring From…										
Arrival Time	Departure Time	Transferring To	SLO 1	SLO 2	SLO 3	SLO 4	SLO 5	SLO 6a	SLO 6b	RTA 9	RTA 10	RTA 12	RTA 14
:00	:03	RTA 14											
:22	:33	RTA 9											
:25	:33	RTA 12											
:28	:33	RTA 10											

Transfers to SLO Transit

Surveyor Name: _____ Date: _____

Scheduled Buses			Start Time _____ am/pm Transferring From…		Start Time _____ am/pm Transferring From…	
Arrival Time	Departure Time	Transferring To	RTA 12	RTA 14	RTA 12	RTA 14
:00	:05	SLO 2				
:05	:10	SLO 4				
:09	:15	SLO 1				
:15	**:15**	SLO 6b				
:17	:20	SLO 5				
:17	:25	SLO 3				
:20	:25	SLO 2				
:35	:40	SLO 4				
:37	:45	SLO 3				
:40	:45	SLO 2				
:45	**:45**	SLO 6b				
:47	**:47**	SLO 1				
:47	:50	SLO 5				
:57	:05	SLO 3				

Transfers to RTA 12 and 14 7:00 AM with Express Bus

Surveyor Name: _____ Date: _____

Start Time: 7:00 AM

Start Time: **7:00** AM			Transferring From…										
Arrival Time	Departure Time	Transferring To	SLO 1	SLO 2	SLO 3	SLO 4	SLO 5	SLO 6a	SLO 6b	RTA 9	RTA 10	RTA 12	RTA 14
7:00	7:03	RTA 14											
7:22	7:33	RTA 9											
7:25	7:33	RTA 12											
7:28	7:33	RTA 10											
--	7:42	**RTA 14 X**											

Appendix D
Presentation Materials for Cuesta College Intercept Surveys

This appendix includes a list of materials that were on display for intercept surveys on the Cuesta College campus, as well as sample comment cards (in English and Spanish).

Survey Materials

Materials included the following:

Posters:
- Announcement Poster with a statement on the purpose of the outreach (see attached).
- A map of the Morro Bay Transit fixed route (see attached)
- A map of the North Coast Fixed Route services (see attached)

Comment Cards:
- In English and Spanish

Riders Guides:
- RTA Route 12, 14 and 15 Riders Guide
- Morro Bay Transit Riders Guide

Free Passes (for passers-by who completed comment cards)
- RTA day passes
- Morro Bay Transit day passes

12	SAN LUIS OBISPO, CUESTA, MORRO BAY & LOS OSOS
14	SAN LUIS OBISPO TO CUESTA ONLY
15	MORRO BAY TO SAN SIMEON

HEARST CASTLE

SAN SIMEON

HEARST STATE BEACH (SEBASTIAN'S CAFE) SUMMER ONLY

HEARST CASTLE VISITOR'S CENTER

CASTILLO @ OTTER (NB ONLY)

HEARST @ SAN SIMEON (SB ONLY)

MOONSTONE @ SAN SIMEON PINES LODGE

SAN SIMEON CAMPGROUND DAY USE AREA SUMMER ONLY

MOONSTONE BEACH DR.

MAIN @ VETS HALL

MAIN @ BLUEBIRD INN

MOONSTONE @ WINDSOR

MAIN STREET

BURTON @ MAIN ST.

MAIN ST.

BURTON @ BURTON CIR.

BURTON @ ARDATH

BURTON DR.

BURTON @ CAMBRIA PINES LODGE

CAMBRIA

MAIN ST.

ARDATH @ HWY 1

FREE RIDE THE SUMMER BEACH TROLLEY!

HWY 46 (TOWARDS PASO ROBLES)

OCEAN @ CAYUCOS PIER (SB)

OCEAN

CAYUCOS DR.

CAYUCOS @ ASH (NB)

4TH (NB)

3RD (SB)

8TH (NB)

9TH (SB)

CAYUCOS

SOUTH OCEAN @ OLD CREEK

RTA 15 TO SAN SIMEON

HWY 1 @ SAN JACINTO SOUTHBOUND ONLY

SAN JACINTO

HWY 41 TOWARD ATASCADERO

MORRO BAY

MORRO BAY PARK HARBOR @ PINEY

SOUTH BAY @ QUINTANA

ROUTE 12 FROM SLO CONTINUES TO LOS OSOS OR TRANSFER TO ROUTE 15

BAYWOOD PARK

SANTA YSABEL @ 7TH ST.

SANTA YSABEL @ 15TH ST.

SANTA YSABEL AVE.

SOUTH BAY BLVD.

2ND @ SANTA MARIA *

11TH ST.

SANTA MARIA AVE.

2ND ST.

11TH @ EL MORRO

BAYWOOD ELEM.

EL MORRO AVE.

7TH @ EL MORRO

9TH ST.

7TH STREET

11TH @ RAMONA

15TH ST.

LOS OSOS MIDDLE SCHOOL

RAMONA AVE.

PINE @ LOMA *

RAMONA @ 7TH *

10TH @ SANTA YNEZ

LOS OSOS

PINE AVE.

PINE @ LOVR *

LOVR @ PALISADES *

10TH @ LOVR

10TH ST.

VONS

RALPHS

* INDICATES LIMITED SERVICE STOP. NOT SERVED ON SHORT ROUTE (MON-FRIDAY, 4 TRIPS/DAY. SEE SCHEDULE.) PASSENGERS MAY REQUEST COURTESY DROP-OFFS

ROUTE 12 SOUTH
TOWARD CUESTA & SAN LUIS OBISPO

WEEKDAY *HOURLY* SERVICE

7:00AM-8:00 PM + 8:38 PM & 9:38 PM

ROUTE 15 NORTH
TOWARD HEARST CASTLE

WEEKDAY SERVICE

7:02 AM, 10:02 AM,12:02 PM, 3:02 PM, 6:02 PM

SEE TIMETABLE FOR WEEKENDS

WEEKDAY TIMES TOWARD MORRO BAY
6:43AM, 7:08AM (12X CAL POLY)
7:43, 8:43, 9:43,10:46
11:46 HOURLY 12:28PM-5:28PM,
6:21PM, 7:21PM, 8:28PM, 9:28PM

SEE TIMETABLE FOR WEEKENDS

WEEKDAY TIMES TOWARD MORRO BAY
HOURLY 6:29AM - 11:39 AM
PLUS 6:54 AM (12X CAL POLY)
HOURLY 12:14 PM - 9:14PM

SEE TIMETABLE FOR WEEKENDS

Cuesta College Students
Save $$ while you study, text and talk!

ROUTE 12 &14 SOUTH
TOWARD SAN LUIS OBISPO

WEEKDAY *HOURLY* SERVICE

7:11AM-8:11 PM

ADDITIONAL WEEKDAY SERVICE

8:48, 9:48, 10:48, 1:48PM, 2:48PM, 3:48PM

ROUTE 12 NORTH
TOWARD MORRO BAY & LOS OSOS

WEEKDAYS: *HOURLY* SERVICE

6:46 AM-8:46 PM

SEE TIMETABLE FOR WEEKENDS

NORTH COAST - CONNECT TO ROUTE 15 IN MORRO BAY

CAL POLY SAN LUIS OBISPO

PERFORMING ARTS CENTER

GRAND

HIGHLAND DRIVE

N. PERIMETER

KENNEDY LIBRARY

101

SANTA ROSA @ MUSTANG VILLAGE & STNR. GLEN APTS.

PALM ST.

HIGUERA

MARSH ST.

SANTA ROSA RD.

EL CHORRO REGIONAL PARK/ SLO BOTANICAL GARDENS

CALIFORNIA MEN'S COLONY (CALL IN ONLY)

SANTA ROSA RD.

SANTA ROSA @ FOOTHILL

KANSAS AVE. (CALL IN ONLY)

CUESTA COLLEGE

ROMAULDO ROAD AT PARKING LOT #3 CALL ON THE WEEKENDS

FOOTHILL BLVD.

GOVERNMENT CENTER OSOS & PALM

RTA LOCAL BUSES CONNECT AT :33 PAST EACH HOUR

SLO TRANSIT STOP IS ACROSS THE STREET.

OSOS ST.

BROAD ST.

NIPOMO ST.

SOUTH ST.

MADONNA RD.

SAN LUIS OBISPO

S. HIGUERA @ MARGARITA (DMV/SOCIAL SERVICES)

S. HIGUERA RD.

TANK FARM RD.

TRADER JOES & FOOD 4 LESS

S.HIGUERA @ SUBURBAN

SUBURBAN RD.

LOS OSOS VALLEY RD.

TARGET

COSTCO

HOME DEPOT

RTA 10 TO SANTA MARIA

RTA 9 TO PASO ROBLES

SAN SIMEON Hearst Castle (15)
Cambria
Cayucos
Morro Bay — *Morro Bay Transit* (12 15)
Cuesta College (12)
Los Osos
Grover Beach
San Miguel (9)
PASO ROBLES *Paso Express*
Templeton — Las Tablas
Atascadero — *El Camino Shuttle*
Santa Margarita
SAN LUIS OBISPO *SLO Transit* Routes 1-5, 6a & 6b
Pismo Beach — Premium Outlets — *South County Area Transit*
Arroyo Grande — Halcyon
Nipomo
SANTA MARIA *SMAT* (10)

rta REGIONAL TRANSIT AUTHORITY

Transfer Point

Park & Ride

Effective August 19, 2012

Call 541-2228 or visit www.slorta.org
For other transit information: call 511

EFFECTIVE: AUGUST 19, 2012

LEGEND

- FULL ROUTE 12 (DAILY)
- 12 SHORT ROUTE (FOUR TIMES/DAY M-F)
- ROUTE 12X CAL POLY (M-F)
- ROUTE 14 (M-F)
- ROUTE 15 (DAILY)
- ROUTE 9 (DAILY)
- ROUTE 10 (DAILY)
- TRANSFER POINT
- TIMED STOP
- UNTIMED STOP

MAP NOT TO SCALE

Route 12 Timed Stops: San Luis Obispo, Cuesta College, Los Osos, Morro Bay

BOLD = PM

Route	Northbound: San Luis Obispo, Gov't Center	Northbound: San Luis Obispo, Cuesta College	Northbound: Morro Bay, Morro Bay Park Arrive	Northbound: Morro Bay, Morro Bay Park Depart	Los Osos Loop (Connect TO RTA 15): Santa Ysabel at 15th	Los Osos Loop: 10th at LOVR	Los Osos Loop: Pine at LOVR	Los Osos Loop (Connect FROM RTA 15): 2nd at Santa Maria	Los Osos Loop: Santa Ysabel at 15th	Southbound: Morro Bay, Morro Bay Park Arrive	Southbound: Morro Bay, Morro Bay Park Depart	Southbound: San Luis Obispo, Cuesta College	Southbound: San Luis Obispo, Gov't Center
Monday - Friday *Lunes A Viernes*													
	-	-	-	-	6:23 *start*	6:29	6:32	6:40	6:43	6:55	7:00	7:11	7:25
12x	*** 12x arrives at Cal Poly at 7:30 am ***				6:48	6:54	6:57	7:05	7:08	7:18	7:18	***	7:39
	6:33	6:46	6:55	7:15	7:23	7:29	7:32	7:40	7:43	7:55	8:00	8:11	8:25
	7:33	7:46	7:55	8:15	8:23	8:29	8:32	8:40	8:43	8:55	9:00	9:11	9:25
	8:33	8:46	8:55	9:15	9:23	9:29	9:32	9:40	9:43	9:55	10:00	10:11	10:25
12s	9:33	9:46	9:55	10:25	10:33	10:39	→	→	10:46	10:55	11:00	11:11	11:25
12s	10:33	10:46	10:55	11:25	11:33	11:39	→	→	11:46	11:55	**12:00**	**12:11**	**12:25**
	11:33	11:46	11:55	**12:00**	**12:08**	**12:14**	**12:17**	**12:25**	**12:28**	**12:38**	**1:00**	**1:11**	**1:25**
	12:33	**12:46**	**12:55**	**1:00**	**1:08**	**1:14**	**1:17**	**1:25**	**1:28**	**1:38**	**2:00**	**2:11**	**2:25**
	1:33	**1:46**	**1:55**	**2:00**	**2:08**	**2:14**	**2:17**	**2:25**	**2:28**	**2:38**	**3:00**	**3:11**	**3:25**
	2:33	**2:46**	**2:55**	**3:00**	**3:08**	**3:14**	**3:17**	**3:25**	**3:28**	**3:38**	**4:00**	**4:11**	**4:25**
	3:33	**3:46**	**3:55**	**4:00**	**4:08**	**4:14**	**4:17**	**4:25**	**4:28**	**4:38**	**5:00**	**5:11**	**5:25**
	4:33	**4:46**	**4:55**	**5:00**	**5:08**	**5:14**	**5:17**	**5:25**	**5:28**	**5:38**	**6:00**	**6:11**	**6:25**
12x	**5:10**	***	**5:38**	**5:38**	**5:46**	**5:52**	**5:55**	**6:03**	**6:06** *end*	*** 12x departs Cal Poly at 5:20 pm ***			
12s	**5:33**	**5:46**	**5:55**	**6:00**	**6:08**	**6:14**	→	→	**6:21**	**6:30**	**7:00**	**7:11**	**7:25**
12s	**6:33**	**6:46**	**6:55**	**7:00**	**7:08**	**7:14**	→	→	**7:21**	**7:30**	**8:00**	**8:11**	**8:25**
	7:33	**7:46**	**7:55**	**8:00**	**8:08**	**8:14**	**8:17**	**8:25**	**8:28**	**8:38**	**8:38**	**8:49**	**9:03**
	8:33	**8:46**	**8:55**	**9:00**	**9:08**	**9:14**	**9:17**	**9:25**	**9:28**	**9:38**	**9:38**	**9:49**	**10:03** *end*
Saturday *Sabado*													
	-	-	-	-	*start* 7:23	7:29	7:32	7:40	7:43	7:53	8:00	CALL	8:25
	8:33	CALL	8:55	9:00	9:08	9:14	9:17	9:25	9:28	-	-	-	-
	-	-	-	-	10:23	10:29	10:32	10:40	10:43	10:53	11:00	CALL	11:25
	11:33	CALL	11:55	**12:00**	**12:08**	**12:14**	**12:17**	**12:25**	**12:28**	-	-	-	-
	-	-	-	-	**12:23**	**12:29**	**12:32**	**12:40**	**12:43**	**12:53**	**1:00**	**CALL**	**1:25**
	1:33	**CALL**	**1:55**	**2:00**	**2:08**	**2:14**	**2:17**	**2:25**	**2:28**	-	-	-	-
	-	-	-	-	**3:23**	**3:29**	**3:32**	**3:40**	**3:43**	**3:53**	**4:00**	**CALL**	**4:25**
	4:33	**CALL**	**4:55**	**5:00**	**5:08**	**5:14**	**5:17**	**5:25**	**5:28**	-	-	-	-
	-	-	-	-	**6:23**	**6:29**	**6:32**	**6:40**	**6:43**	**6:53**	**7:00**	**CALL**	**7:25**
	7:33	**CALL**	**7:55**	**8:00**	**8:08**	**8:14**	**8:17**	**8:25**	**8:28** *end*	-	-	-	-
Sunday *Domingo*													
	-	-	-	-	*start* 8:23	8:29	8:32	8:40	8:43	8:53	9:00	CALL	9:25
	9:33	CALL	9:55	10:00	10:08	10:14	10:17	10:25	10:28	10:38	10:38	CALL	11:00
	11:33	CALL	11:55	**12:00**	**12:08**	**12:14**	-	-	-	-	-	-	-
	-	-	-	-	**12:23**	**12:29**	**12:32**	**12:40**	**12:43**	**12:53**	**1:00**	**CALL**	**1:25**
	1:33	**CALL**	**1:55**	**2:00**	**2:08**	**2:14**	**2:17**	**2:25**	**2:28**	**2:38**	**2:38**	**CALL**	**3:00**
	3:33	**CALL**	**3:55**	**4:00**	**4:08**	**4:14**	-	-	-		-	-	-
	-	-	-	-	**4:23**	**4:29**	**4:32**	**4:40**	**4:43**	**5:00**	**5:00**	**CALL**	**5:25**
	5:33	**CALL**	**5:55**	**6:00**	**6:08**	**6:14**	**6:17**	**6:25**	**6:28** *end*	-	-	-	-

Route 14 Timed Stops

Weekdays during Cuesta Fall & Spring Sessions Only

To Cuesta: Gov't Center	To Cuesta: Cuesta College	From Cuesta: Cuesta College	From Cuesta: Gov't Center
7:42	7:55	8:48	9:00
8:03	8:16	9:48	10:00
9:03	9:16	10:48	11:00
10:03	10:16	**1:48**	**2:00**
1:03	**1:16**	**2:48**	**3:00**
2:03	**2:16**	**3:30**	**3:45**
3:03	**3:16**	**3:48**	**4:00**

Connect w/ RTA 10x

BUY A PASS SAVE MONEY

Menos dinero, compra un pase

Regional Day Pass	$5.00
RTA & SCAT 7-Day Pass	$14.00
RTA 31-Day Pass	$44 Regular/$22 Discount
Regional 31-Day Pass	$64 Regular/$32 Discount
RTA & SCAT Stored Value Card	$15 Value

*Only the Day Pass is available on the bus.
Sólo el Regional Day Pass es availabe a bordo del autobús.

Purchase passes at Rabobank branches
throughout San Luis Obispo County.
See Ride Guide for more pass outlet locations.

CASH FARES *TARIFAS*	San Luis Obispo	Kansas/CMC Cuesta	Morro Bay/ Los Osos	Cambria/Cayucos/ San Simeon
San Luis Obispo	$1.50	$2.00	$2.50	$3.00
Kansas/CMC/ Cuesta College	$2.00	$1.50	$2.00	$2.50
Morro Bay/Los Osos	$2.50	$2.00	$1.50	$2.00
Cambria/Cayucos/ San Simeon	$3.00	$2.50	$2.00	$1.50

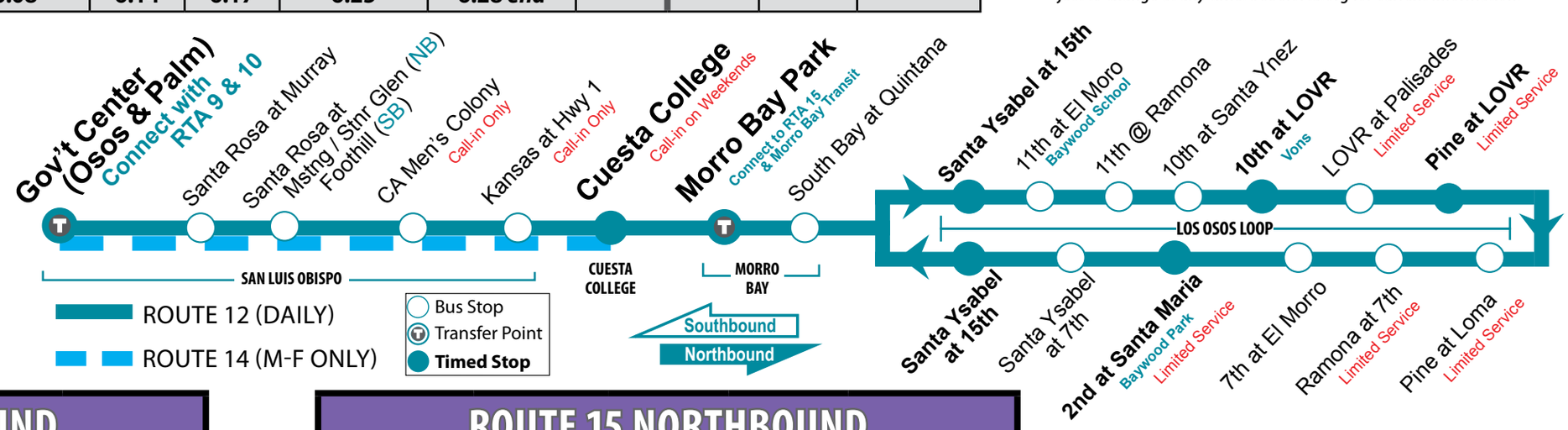
REGIONAL DAY PASS: $5.00

Discount Fares are **half the regular cash fares** for **Seniors** (65-79), **Students** (K-12), **Disabled and Medicare Card Holders**.

Ask for a FREE transfer ticket when you pay the full fare between Route 15 and 12 only. Transfers tickets are not available on return trips, or on RTA Routes 9 or 10.

Please carry exact fare. No change is given. All information is subject to change at any time. See slorta.org for current information.

PLAN YOUR TRIP on www.slorta.org



BOLD = PM

ROUTE 15 SOUTHBOUND
TIMED STOPS: HEARST CASTLE TOWARDS MORRO BAY

	SAN SIMEON: Hearst Castle Visitors Center	SAN SIMEON: Hearst Dr. @ San Simeon	CAMBRIA: Burton @ Main St.	CAYUCOS: Ocean @ Cayucos	MORRO BAY: Morro Bay Park - *Arrive*
Mon- Fri *Lunes A Viernes*	----	start 6:05	6:17	6:40	6:55
	8:00	8:05	8:17	8:40	8:55
	11:00	11:05	11:17	11:40	11:55
	2:00	**2:05**	**2:17**	**2:40**	**2:55**
	5:00	**5:05**	**5:17**	**5:40**	**5:55**
Saturday *Sabado*	-	7:05 start	7:17	7:40	7:55
	10:00	10:05	10:17	10:40	10:55
	12:00	**12:05**	**12:17**	**12:40**	**12:55**
	3:00	**3:05**	**3:17**	**3:40**	**3:55**
	6:00*	**6:05**	**6:17**	**6:40**	**6:55**
Sunday *Domingo*	-	start 8:05	8:17	8:40	8:55
	12:00	**12:05**	**12:17**	**12:40**	**12:55**
	4:00	**4:05**	**4:17**	**4:40**	**4:55**

12 & 15 Connect at Morro Bay Park

ROUTE 15 NORTHBOUND
TIMED STOPS: MORRO BAY TOWARDS HEARST CASTLE

	MORRO BAY: Morro Bay Park - *Depart*	CAYUCOS: Cayucos Dr. @ Ash	CAMBRIA: Burton @ Main St.	SAN SIMEON: Castillo @ Otter Way	SAN SIMEON: Hearst Castle Visitors Center
Mon- Fri *Lunes A Viernes*	7:02	7:14	7:34	7:47	7:54
	10:02	10:14	10:34	10:47	10:54
	12:02	**12:14**	**12:34**	**12:47**	**12:54**
	3:02	**3:14**	**3:34**	**3:47**	**3:54**
	6:02	**6:14**	**6:34**	**6:47 end**	----
Saturday *Sabado*	9:02	9:14	9:34	9:47	9:54
	12:02	**12:14**	**12:34**	**12:47**	**12:54**
	2:02	**2:14**	**2:34**	**2:47**	**2:54**
	5:02	**5:14**	**5:34**	**5:47**	**5:54***
	8:02	**8:14**	**8:34**	**8:47 end**	
Sunday *Domingo*	10:02	10:14	10:34	10:47	10:54
	2:02	**2:14**	**2:34**	**2:47**	**2:54**
	6:02	**6:14**	**6:34**	**6:47end**	----

*** Peak Summer season only: when Castle gates are open**

RTA
805.541.2228
slorta.org
transit info
call 511

No service on holidays:
New Years Day, Memorial Day, 4th of July, Labor Day, Thanksgiving and Christmas

North Coast Transit Service
RTA Routes 12-14-15, Morro Bay Transit, and Cambria Trolley

Legend

Regional and Local Transit Routes

- RTA Route 12, Short (SLO-MB-LO-MB-SLO)
- RTA Route 12, Long (SLO-MB-LO-MB-SLO)
- RTA Route 14 (SLO to Cuesta College)
- RTA Route 15 (Morro Bay to Hearst Castle)
- Cambria Trolley (serviced by RTA)
- Morro Bay Transit: Fixed Route
- Morro Bay Trolley

Regional and Local Transit Stops

- RTA stops, time points
- RTA stops, non-time points
- Local transit stops, time points
- Local transit stops, non-time points

- Transit Center

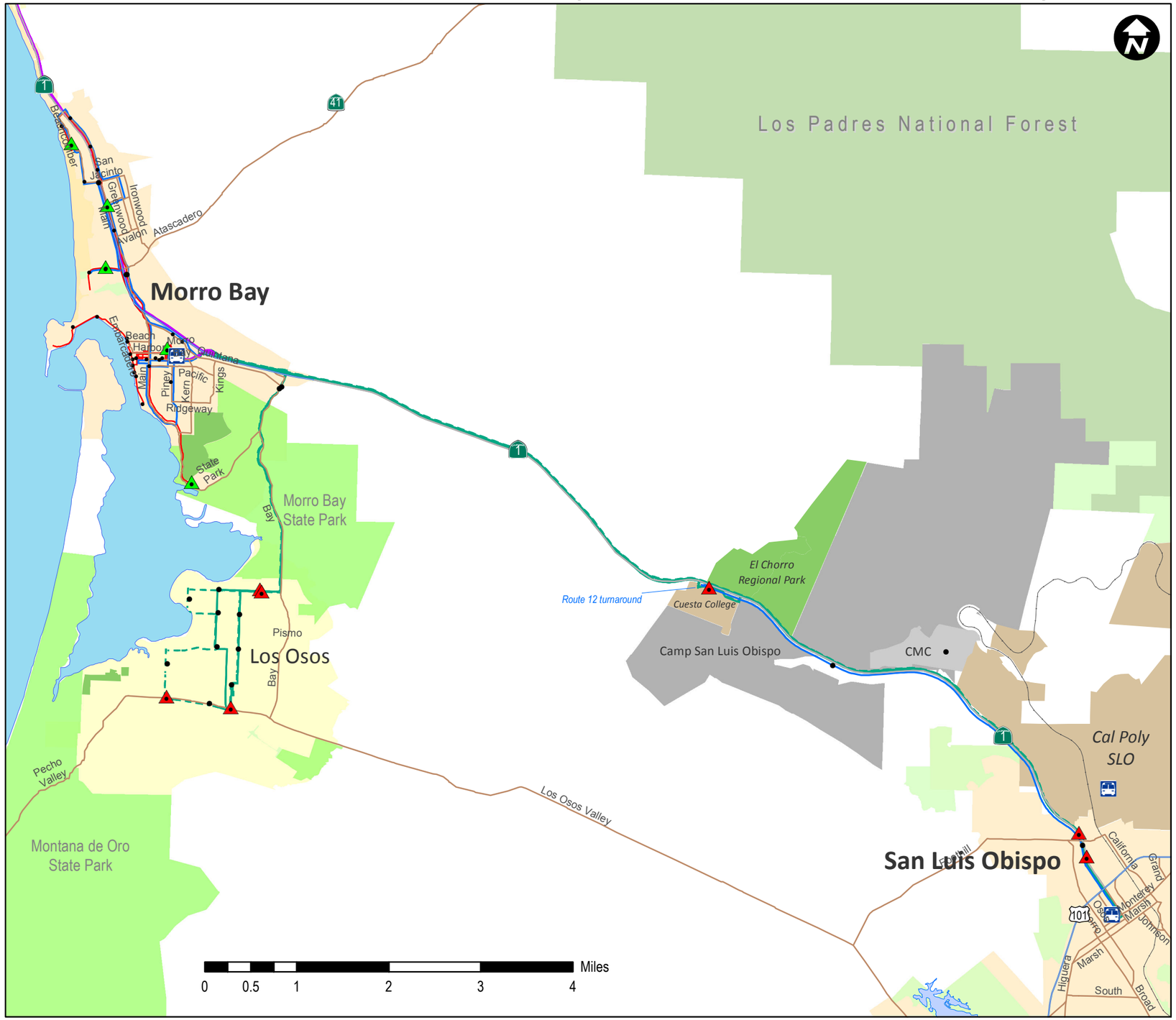
Roadways

- Freeway and Expressway
- Rural 2-Lane Highway
- Major Roadways

- Union Pacific Railroad
- Regional Parks and Golf Courses
- City limits
- Unincorporated communities

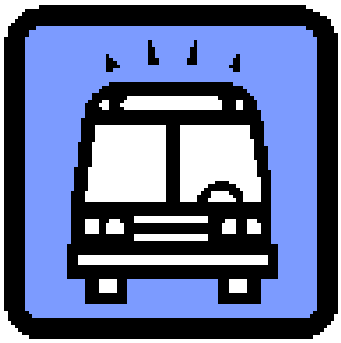
San Luis Obispo Council of Governments

Map purpose: North Coast Transit Survey RFP
Map created by: Geoffrey Chiapella, SLOCOG
Date created: January 4, 2013



TRANSIT INFORMATION and FEEDBACK

RTA and MORRO BAY TRANSIT



TELL US WHAT YOU THINK!!

- ★ **Do you use RTA and/or Morro Bay Transit Services?**
- ★ **If you do, how would *you* improve them?**
- ★ **If you don't, do you wish you could? What would it take for you to be able to use transit?**

Come on over and check out your local and regional transit. Fill out a comment card. Your input is important to us!

Morro Bay Transit
Fixed Route ★ Call-A-Ride

rta
REGIONAL TRANSIT AUTHORITY

Cuesta College Intercept Survey Responses

Improvements passengers would like to see:

3 was old bus; 6B was really nice. More bike storage on buses would be great.
All is well
Better schedules online & times for every stop.
Buses more often
Extended bus hours in the evening and on weekends
Extended hours on weekend
Free food, jk. Amazing. 24 hr service if possible.
I am quite satisfied.
I miss the stop at Cal Poly to and from Cuesta (direct)
I want a service in Callbero any ways cuz I walk in Pine almost 40 min.
I would love for an online driver schedule list so that I don't have to see my ex-boyfriend
I'd love increased service between SLO and Cuesta
It works really well for me.
Little too expensive
More buses and more pick up times. If it became more efficinet with time and more routes, people would drive less. People I know would love to ride the bus but need a better system in place.
More frequency of busses arriving at stops
More pick ups and drop offs in Cayucos.
More San Luis to Los Osos strait trip via LOVR
More Saturday service between SLO and Morro Bay
More stops and smaller fees
More stops, more bus stations (centers)
Nicer drivers, better control over passengers (12, 14); making sure disabled get on first and get seats.
No improvements necessary
No, working well for me.
None
None--the systems in place fit my needs perfectly.
Punchcard. I use the bus, but only 3 times/week (not enough for a monthly bus pass cost). Punchcard would be easier & I would probably use bus more.
Reinstate route that goes to Madona Plaza for RTA
Serving more areas in Nipomo. Only serving 1/2 of Nipomo--missing lots of people. Times work well.
Slightly wider seats and to wait longer at bus stops
There should be an 11:33 or 12:33 pick up from Cuesta
They are great. They could be on time more. They are often late.
Transfer services: Hour long waits if exact transfer missed. Cost--no $ transfer, 2 separate charges. Pass for both City and RTA?
USB port to charge my cell phone. More travel on Sunday. Better bus passes (like the "LA tap card")
Works well for me.
Works well for me. MAYBE longer hours
Works well. Allmost ran out of gas. Transit saves $. Bus by HS to work--always miss connection.
Would like to use (if/but...)
I used 3 years ago and would like to try again. Was only 2x/day then.
Don’t know exact locations
I have to be somewhere at a specific time
I live in Atascadero. Long ride.
It's cheaper to carpool
Now I use Vespa/bike
Changes that might encourage use:
Better control of passengers
cheaper bus rates $25-30

I live of LOVR & Madona, take O'Connor to Cuesta. If there was a faster bus I definitely would
I would need to stop driving
If the bus went to South Higuera
It would be nice if the 9 stopped off the north end of Atascadero
More affordable than bike/Vespa
More pick up times, quicker transit, more buses
More stops, more centers. I would love to use the bus in general.
Take less time from AG to SLO
To go to school.
Other Comments:
Works really well. Really want to ride the double decker.

RTA and Morro Bay Transit want to know about your use of or interest in transit services. If you're interested in transit, we would like your opinion about services. (Mark answers as appropriate)

Have you used transit services in the area? ☐ Yes ☐ No

If yes, which services? (check all that apply) ☐ RTA Route 12 ☐ RTA Route 14 ☐ RTA Route 15
☐ Morro Bay Transit ☐ Other (please list) _____

What service improvements would you like to see?

_____

_____

_____

If you **don't use transit**, why not? (check main reason) ☐ Prefer to drive ☐ Times don't work
☐ Bus takes too long ☐ Doesn't serve where I go (list location _____)
☐ Other reason (please list) _____

Would you like be able to use transit? ☐ Yes ☐ No **If yes**, what changes could make this happen?

_____

Please **WRITE** any additional **COMMENTS** you have regarding the alternatives on the **BACK** of this card, and return it to the envelope marked "comments" on the table. If you want more info, feel free to write your name and contact information on the back. Thank you for your input!

RTA and Morro Bay Transit want to know about your use of or interest in transit services. If you're interested in transit, we would like your opinion about services. (Mark answers as appropriate)

Have you used transit services in the area? ☐ Yes ☐ No

If yes, which services? (check all that apply) ☐ RTA Route 12 ☐ RTA Route 14 ☐ RTA Route 15
☐ Morro Bay Transit ☐ Other (please list) _____

What service improvements would you like to see?

_____

_____

_____

If you **don't use transit**, why not? (check main reason) ☐ Prefer to drive ☐ Times don't work
☐ Bus takes too long ☐ Doesn't serve where I go (list location _____)
☐ Other reason (please list) _____

Would you like be able to use transit? ☐ Yes ☐ No **If yes**, what changes could make this happen?

_____

Please **WRITE** any additional **COMMENTS** you have regarding the alternatives on the **BACK** of this card, and return it to the envelope marked "comments" on the table. If you want more info, feel free to write your name and contact information on the back. Thank you for your input!

MORRO BAY TRANSIT

Effective 8/19/12 through 6/30/13

Days and Hours

Monday through Friday
6:25 a.m. - 6:45 p.m.

Fixed Route Stops

*Bus stop times are shown in minutes on the hour during service hours.

1. Main at Bonita
2. Main at Spencer's Market
3. Main at Sequoia
4. Main at Jamaica
5. Main at Tahiti
6. Beachcomber at Mindoro (stairs to campground)
7. Sandalwood at San Jacinto (beach access)
8. Atascadero at 200 Block (Teen Center; High School)
9. Atascadero at Morro Dunes
10. Atascadero at 300 Block (Motel 6)
11. Quintana at Cookie Crock
12. Quintana at Albertson's
13. City Park at Harbor
14. Piney Way at Anchor
15. Market at Morro Bay Blvd. (Centennial Stairway)
16. Community Center/Senior Center
17. Main at Errol

You may board or leave the bus at any point along the route where the driver can make a safe stop, but it is recommended catching the fixed route bus at the designated bus stops.

Call-A-Ride ~ 772-2744

Call-A-Ride curb-to-curb service is available to everyone. The fixed route bus will flex off route up to 3/4 of a mile to pick up/drop off the rider, then return on route before the next scheduled stop. **Be ready when the bus arrives by being out at the curb at your scheduled pick up time.**

To schedule a Call-A-Ride trip, call between the hours of 8 a.m. to 10 a.m., Monday through Friday, to schedule a ride for the next day. Monday trips will need to be scheduled on the Friday before.

Transit Connections

The Fixed Route connects with the Regional Transit Authority north coast routes at City Park. In addition, during the trolley season, the Fixed Route connects with trolley routes at City Park and at the Centennial Stairway on Market Street.

Holidays

Fixed Route and Call-A-Ride service is not available on City observed holidays.

Bag Limit

Due to limited space in the bus, each passenger may bring either 2 paper or 3 plastic bags on board the bus.

Bicycle Racks

The bus is equipped with a bicycle rack for your use. Space is on a first come, first served basis. Passengers are responsible for both loading and unloading the bicycle from the rack.

Please signal to the driver that you will be loading your bicycle. Also, when exiting the bus, remind the driver that you will be unloading your bicycle from the rack.

The City is not responsible for bicycles left on or for damages arising from bicycles not properly affixed to the rack.

No bicycles will be allowed inside the bus.

FARE INFORMATION

Fare is on a per ride basis
- **Fixed Route - $1.50**
- **Discount Fixed Route* - 0.75**
- **Call-A-Ride - $2.50**

***Seniors (65 & over) and disabled individuals are eligible for the discount fare.**

Children under 5 years old ride the fixed route free with a fare paying adult (limit 2).

PASS INFORMATION

Day Pass:
- **Fixed Route - $4**
- **Discount Fixed Route - $2**

Punch Pass: 11 rides
- **Fixed Route - $15.00**
- **Discount Fixed Route - $7.50**
- **Call-A-Ride - $25**

The Fixed Route will accept Regional 31 Day and Day Passes.

morro-bay.ca.us/mbt
(805) 772-2744

Additional Transit Services

Regional Transit Authority

slorta.org
541-2228
541-2544 Runabout information

Operates transit services connecting communities in San Luis Obispo county.

Fixed Route Service

Routes 12 and 15 serve Morro Bay. Connections between RTA's fixed routes and the City's fixed route are made at City Park.

Runabout

RTA also operates Runabout the American's with Disabilities Act (ADA) service to fixed routes for San Luis Obispo county.

To learn if you qualify to use Runabout, visit RTA's website, slorta.org/runabout or call RTA.

SLO Regional Rideshare

rideshare.org
For transportation info call 511

One-stop-shop for transportation information to increase mobility for people living, working and visiting San Luis Obispo County.

Ride On Transportation

ride-on.org
541-8747

Ride On operates a senior and medical shuttle within the county.

North Coast Senior Shuttle

- Seniors 65 and older
- Fare is $3 each way
- Monday and Wednesday
- 9 am until 5 pm
- Travel anywhere between Cambria and SLO

Medical Shuttle

- CenCal or Medi-Cal insurance pays for the trip
- Medical appointment shuttle service to and from the doctor's office or hospital anywhere in SLO County.
- Ask for the Medi-Cal Secretary when calling for a ride

Mobility Coordinator

Contact Ride-On's Transportation Mobility Coordinator to help determine which transit service available best fits your trip's need. Call 541-8747 and ask for the Mobility Coordinator.

Good Neighbor Program

547-7025
This program provides free rides to seniors 55+ & adults 18+ with disabilities. Call to arrange a ride for medical appointments, errands, shopping, social engagements and more.

Transit Connections

Morro Bay Transit connects with Regional Transit Authority Routes 12 and 15 at City Park.

During the trolley season, Morro Bay Transit connects with the trolley routes at City Park and at the Centennial Stairway on Market Street. The Regional Transit Authority connects with the trolley at City Park.

Travel Tips

- No eating, drinking, smoking, or playing loud music.
- No standing or sitting in the step wells.
- No animals, except for certified service, guide, or signal dogs used by physically challenged riders.
- Do not willfully disturb the driver or other passengers.
- No graffiti, alcohol, drugs or weapons of any kind.
- Keep the bus clean by using the trash receptacle.
- Remain seated until bus comes to a complete stop.

Morro Bay Transit
Fixed Route ★ Call-A-Ride

Morro Bay Transit

Fixed Route and Call-A-Ride

morro-bay.ca.us/transit

772-2744

Effective 8/19/12 through 6/30/13

AGENDA NO.: **A-6**

DATE: **11/4/2013**

PUBLIC WORKS ADVISORY BOARD
City of Morro Bay, Department of Public Services

Director's Report / Information Items

Prepared: 10/29/2013

Category	Information Item	Staff Contact	Status
Transit	Morro Bay Transit and Trolley	Janeen Burlingame	On September 26, the City Council approved a one year extension of the Morro Bay Transit and Trolley Operations and Management Agreement with MV Transportation, effective January 1, 2014. The 2013 Trolley season ended Sunday, October 6. Morro Bay Transit conducted an onboard survey regarding weekend service. Results are included in the 11/4/13 staff report regarding consideration of adding some type of weekend service.
Wastewater	NEW WRF MMRP	Bruce Keogh, Rob Livick	See item C-2 this Agenda. Future meetings include: Public Workshop 11-5-2013, City Council Meeting 11-12-13 Staff is working on continuing with the Major Maintenance and Repair Plan to keep the treatment plant operating safely, efficiently and meeting all the discharge permit requirements for the next five or so years while the new plant site is being selected, permitted, designed and constructed. Council and the Sanitary District have approved a capital budget for FY 2013/2014 of approximately $1.2 million, that includes: Chlorine Building Rehabilitation, Clean/Repair Digester #2, replace Headworks Screening and other smaller pump and valve replacement projects. For additional information regarding the MMRP see the latest staff report in the Council Agenda item C-1 October 8, 2013 (http://www.morro-bay.ca.us/ArchiveCenter/ViewFile/Item/1925) Current information on the status of the New Water Reclamation Facility (WRF) project can also be found on the City of Morro Bays website (www.morro-bay.ca.us/WRF).
Other Capital Projects	Fire Station 53 Admin/Living Quarters Project	Rob Livick	No Change: Project is complete. Working on the final paperwork for OES, FEMA and USDA.

Category	Information Item	Staff Contact	Status
Water	Resource Management, Operations	Rob Livick, Jamie James	- Mandatory Water Conservation Measures: (No Change) Mandatory Water Conservation Measures are in effect. The community is currently at a Moderately Restricted Water Supply condition in accordance with Chapter 13 of the City of Morro Bay Municipal Code. - State Water Project: The State Water Project (SWP) maintenance shutdown is currently in effect and runs from November 1 through November 26. The City will be supplying potable water through the use of its Desal plant running its Brackish Water Reverse Osmosis treatment units on local groundwater and supplementing by blending with raw local groundwater and the emergency supply from the California Men's Colony, as needed. When State water is on, the SWP is only providing 35 percent of requested water. That means that with the City's drought buffer (insurance) and water in storage in San Luis Reservoir, which is over 2 x our annual allocation, deliveries are adequate to ensure that Morro Bay will receive 100% of its entitlement. The California Coastal Commission Permit to operate the salt water wells and outfall expired in 1999. The City has applied to for a permit to make those facilities permanent - Potable Water Production (in ac-ft):

Year	Chorro Basin	Morro Basin	R/O Plant	State Water)	
1997	986	249	0	301	1536
1998	38	0	0	1287	1326
1999	34	0	0	1359	1393
2000	4	0	0	1396	1400
2001	12	0	0	1398	1410
2002	1	32	47	1373	1454
2003	3	29	13	1384	1429
2004	49	213	20	1206	1487
2005	204	151	0	1008	1362
2006	257	79	25	1010	1371
2007	276	35	19	1116	1446
2008	184	52	28	1175	1439
2009	235	80	66	1069	1450
2010	86	391	258	873	1609
2011	18	101	84	1144	1347
2012	1	109	70	1130	1310
2013 (YTD)	0	24.1	10.1	914.9	949.1
Total	2388	1545.1	640.1	19143.9	22769

- Water Rates: See item C-4

Category	Information Item	Staff Contact	Status
Collection System Capital Projects	Collection System	Jarrod Whelan Rob Livick	- Lift Station 3 (Quintana Road): The project is complete, accepted and is in operation. - Lift Station 2 (Front Street): The project is complete, accepted and is in operation.
Storm Water (no change)	Storm Water Plan	Rob Livick	The City submitted its annual Stormwater report to the Water Board by the June 1, 2013 deadline. This year the annual report is available for review on the City's website (http://ca-morrobay.civicplus.com/documents/9/78/80/112/NPDES%20Annual%20Report%20Year%204_201306031224323905.pdf) Post Construction control requirements are to be adopted by the City by September 6, 2013. A new phase II small MS4 general permit was adopted on February 5, 2013 by the State Resources Control Board. The City has 6 months to revise our current stormwater management plan to include these new permit requirements.
	Total Daily Maximum Load (TMDL) Program		Staff is continuing with water quality sampling near several outfalls in the bay and is testing for pathogens. Pathogens are the constituent for which the Regional Board has the most concern due to public contact and shellfish operations. See page 23 of the above referenced annual report for additional information.

Category	Information Item	Staff Contact	Status
Streets/Sidewalks/ Storm Drain Maintenance	Local Street Maintenance Projects	Mike Wilcox, R&P	Street, Sidewalk, Street Tree and Storm drain maintenance has shifted to the Recreation and Parks Maintenance Division as of July 1, 2010. If you have street, street tree or storm drain maintenance issues please call 772-6278 so that it can be added to the list of work. The City will still be patching potholes and the best way to notify the City regarding a pothole that needs attention is to use our E-Notify system (on the City's website www.morro-bay.ca.us, click on City Departments, then on Recreation and Parks to the E-Request Form or http://morro-bay.ca.us/erequest). Upon receipt, those E-Requests will be reviewed, cataloged and entered into our database. Finally, the repairs will be scheduled. In the future, the City will be adding to the website a list or "Street Maintenance Queue" so you will be able to monitor the progress and see when your pothole may be repaired.
	Pavement Management Plan	Sauerwein/Whelan	The 2013 Street rehabilitation program is will commence on November 4, 2013 with a preconstruction meeting with the contractor Souza Construction. The sealing portion of theis project is due to be awarded at the November 12, 2013 City Council meeting. Over 700,000 of street work will be performed. See attachment for Summary of street work and http://www.morro-bay.ca.us/bids.aspx?bidID=13 for complete plans.
	Morro Creek Bridge	Sauerwein/Rands	The project is proceeding forward per the schedule. The environmental document is currently out for its 30 day public review. To review the initial study go to http://www.morro-bay.ca.us/index.aspx?nid=771
Street Trees	Urban Forest Plan	Hanson	Scheduled to go to Planning Commission December 2013
Misc			**Notify Me:** Sign up for Notify Me on the City's Website for notification of Council, Boards and Commissions information. Notify Me can be accessed from a link on the City's Homepage. **Let Us Know:** The City has added a new feature to the website, Let Us Know, which is replacing the Citizen E-Request link on the City's Homepage. With Let Us Know, citizens can submit a compliment, request, or report a concern to the City for predetermined issues without the need to phone the City during business hours (for example: reporting a pothole). Staff can also add requests to Let Us Know for someone over the phone or in the office if they do not have access to a computer. Each category in Let Us Know is assigned to the appropriate staff member to handle so citizens don't have to figure out what department to contact for an issue they need to report on.

*** Please contact individual staff members prior to the meeting if possible for more detailed information**.

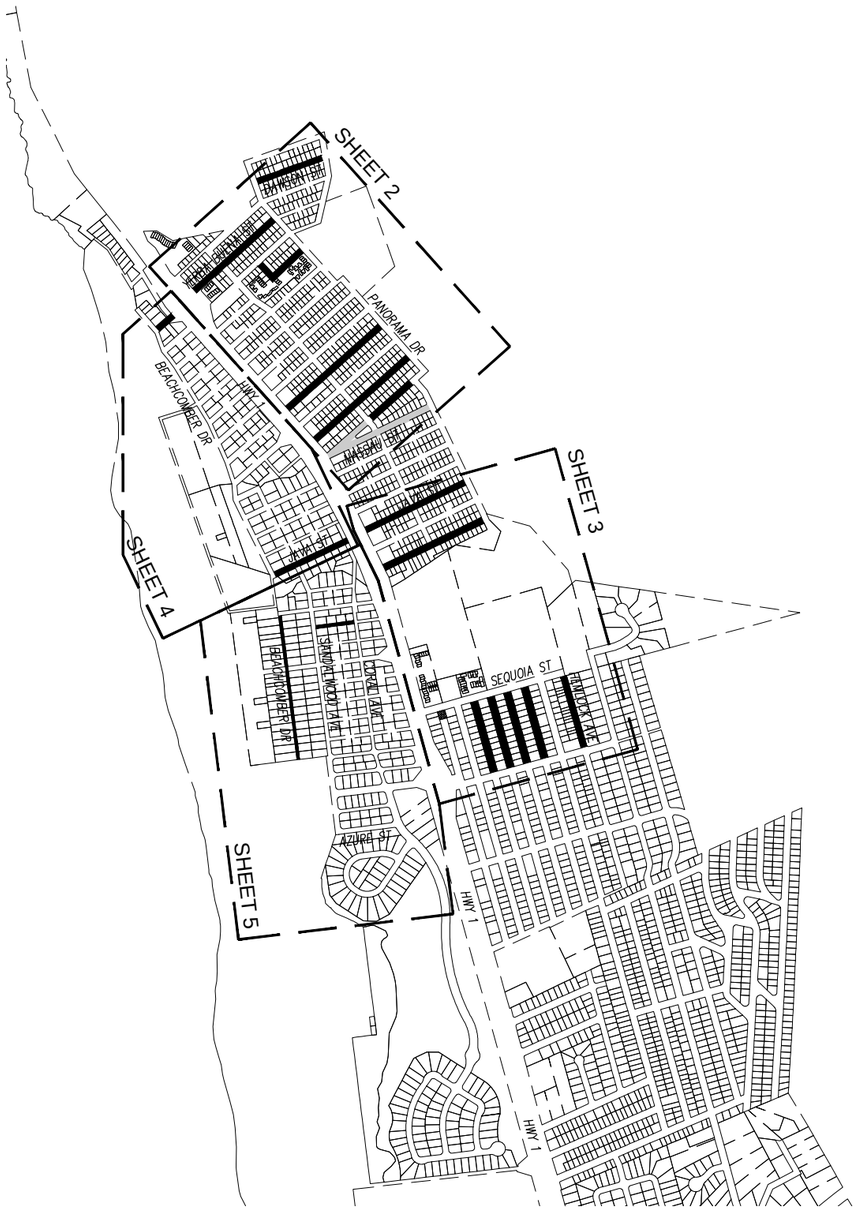
CITY OF MORRO BAY

3-LAYER CAPE SEAL & MICRO SURFACING PROJECT

Director's Report Attachment

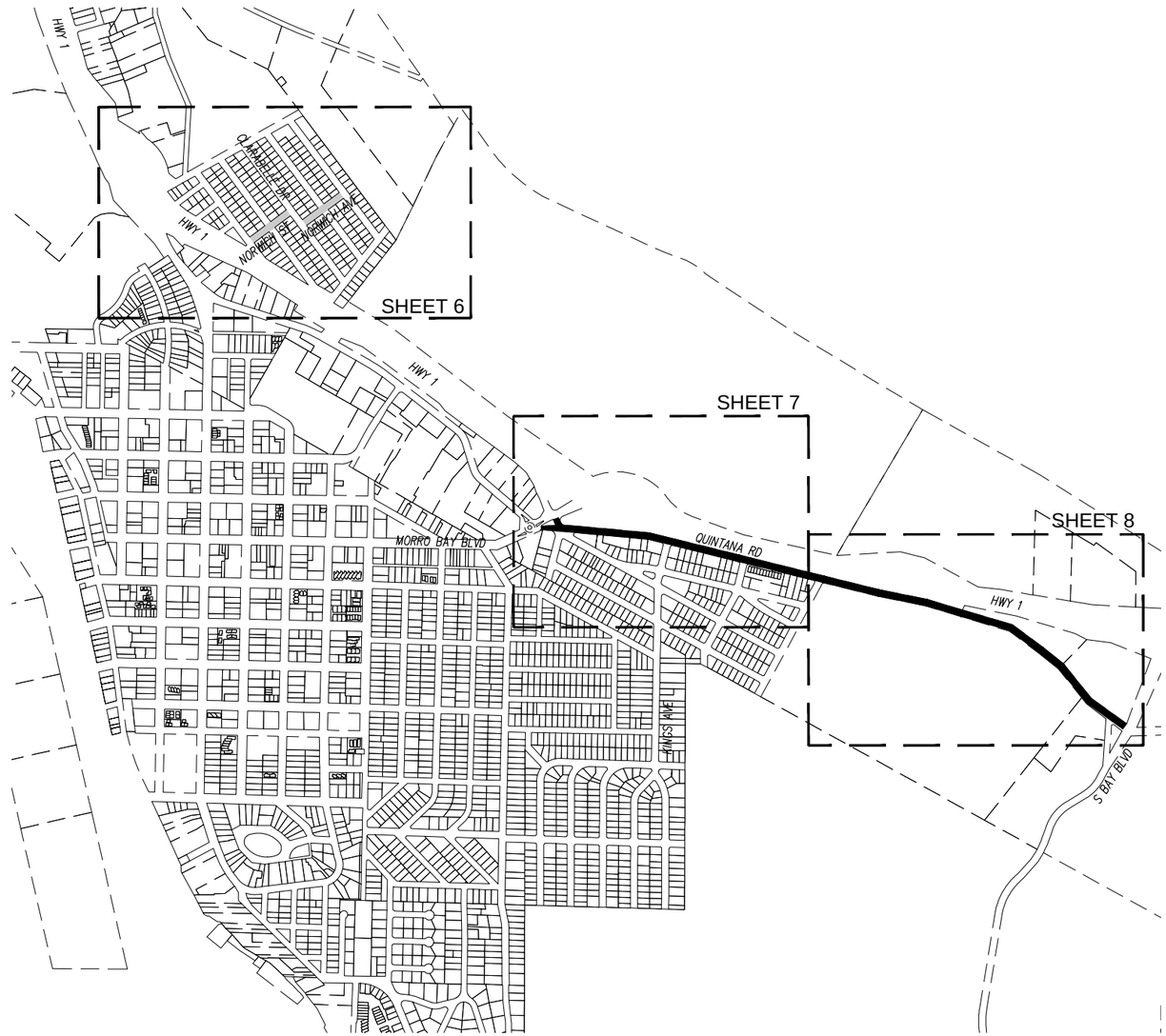
LEGEND

- 3- LAYER CAPE SEAL
- MICRO SURFACING
- PAVEMENT MARKINGS ONLY



VICINITY MAP - NORTH MORRO BAY

NTS



VICINITY MAP - SOUTH MORRO BAY

NTS

955 SHASTA AVENUE MORRO BAY, CA 93442 805-772-6261 www.morro-bay.ca.us

CITY OF MORRO BAY
DEPARTMENT OF PUBLIC SERVICES
3-LAYER CAPE SEAL & MICRO SURFACING PROJECT

ROAD SCOUTS

DRAWN BY:	SPLS	SHEET NO:
MB-2013-SO4	COVER SHEET	1 OF 9
SCALE:	NTS	

AGENDA NO: C-1

MEETING DATE: November 4, 2013

Staff Report

TO: **Public Works Advisory Board** **DATE: October 29, 2013**

FROM: **Janeen Burlingame, Management Analyst**

SUBJECT: **Morro Bay Transit Options for Weekend Service**

RECOMMENDATION

Staff recommends the Board do the following:

1. Consider the options for weekend Morro Bay Transit service;
2. Recommend the City Council expand transit service on Saturdays, year round, for an 8 hour day, beginning July 1, 2014;
3. Recommend the City Council authorize the allocation of $15,300 from the FY 13/14 Transportation Development Act funds for Saturday year round service; and
4. Recommend the City Council implement the weekend service on a trial basis for one year with a review of actual ridership and farebox ratio impact after 6 months.

ALTERNATIVES

1. Recommend the Council implement Option 2.
   Impact: Year round Sunday service is estimated to yield a farebox ratio of 5.1% (State requirement is 10%).

2. Recommend the Council implement Option 3.
   Impact: Saturday service during the trolley's off season (winter and spring months) is estimated to yield a farebox ratio of 10% (State requirement is 10%).

3. Recommend the Council implement Option 4.
   Impact: Sunday service during the trolley's off season (winter and spring months) is estimated to yield a farebox ration of 5% (State requirement is 10%).

4. Recommend the Council implement Options 1 and 2.
   Impact: Year round Saturday and Sunday service is estimated to yield a farebox ratio of 7.7% (State requirement is 10%).

5. Recommend the Council select Options 3 and 4.
   Impact: Saturday and Sunday service during the trolley's off season (winter and spring months) is estimated to yield a farebox ratio of 7.5%.

FISCAL IMPACT

There is no general fund impact to adding Saturday service. Funding for the added service would come from the Transportation Development Act monies that are allocated to the City each year. The estimated cost for a year round Saturday 8 hour day is $15,271 and fares are estimated at $1,567 (assuming all new rides and there is no shift in rides from weekday), resulting in an estimated 10.3% farebox ratio.

Prepared By: _JB_ **Dept Review: _RL_**

SUMMARY

At its July 9 meeting, the Council directed staff to bring an item to the Public Works Advisory Board regarding evaluating options for weekend transit service during winter months after the trolley season ends, including a rider survey, and then bring the item to the Council for consideration.

An on board survey of transit riders was conducted by Morro Bay Transit during the month of September. Results of this survey are included in Attachment 1 and summarized in the Discussion section below.

The North Coast Transit Surveys 2013 project, conducted by the San Luis Obispo Council of Governments, started in spring 2013, included an on board survey on all fixed routes operating along the north coast to gather various rider demographic and boarding/alighting information, including if there are any improvements to the service requested by riders (see Agenda Item A-5 for summary of Technical Memorandums for this project). Results relating to weekend requests for Morro Bay Transit were reviewed when developing options for consideration.

Staff developed cost, fare and farebox ratio estimates for various weekend service options that is included in Attachment 2.

DISCUSSION

Existing Transit Services in Morro Bay

Current local transit services provided in Morro Bay include Morro Bay Transit, a year round, weekday deviated fixed route with Call-A-Ride trips where the bus goes off route up to ¾ of a mile to pick up/drop off riders, and Morro Bay Trolley, a seasonal fixed route service that operates Friday through Monday from Memorial Day to Labor Day and then weekends only until the first weekend in October.

The Regional Transit Authority (RTA) operates limited weekend service of its Routes 12 and 15 that stop in Morro Bay at City Park, and have no other stops in Morro Bay other than one on the highway at San Jacinto for Route 15. Additionally, RTA operates Runabout, the Americans with Disabilities Act complementary paratransit service for qualified users, on weekends when the fixed routes for RTA and the Trolley are running.

During the trolley season, local riders who are able to walk to a trolley stop are able to use the service to get to/from their homes to the Downtown and waterfront areas. Historically, the local ridership is minimal, comprising less than 10% of trolley ridership (derived from prior trolley on board surveys). According to the on board surveys from the North Coast Transit Surveys project that took place in July 2013 over one day, 13% of trolley riders were local residents (half of which were full time and half were part time residents).

North Coast Transit Surveys 2013 Project

On board surveys were conducted on Morro Bay Transit as part of the North Coast Transit Surveys project. Surveying was conducted over a one day period in April 2013. One question asked about service improvements and 36% of respondents indicated Saturday service while 26% indicated Sunday service.

Morro Bay Transit On Board Survey

On board surveys were conducted during the month of September 2013. Results are summarized in Attachment 1. A total of 55 surveys were collected. It is estimated that there are between 80 and 90 unique riders for Morro Bay Transit, resulting in a 50% response rate.

Two-thirds of the respondents indicated Saturday service would best serve their needs and one-third indicated Sunday service. Regarding how often weekend service would be used, 79% of respondents indicated every weekend and 18% indicated once or twice a month. Regarding the purpose of the trip, 29% indicated shopping, 19% recreation or social activity and 18% connection with RTA fixed route 12 or 15. Regarding what time during the weekend would best serve their needs, 20% indicated 9-10 AM while the other times were close with 15% and 14% each.

A question about what current fare the respondent pays for weekday service was included to aid with developing estimated fares in order to calculate a farebox ratio for each option. There was an even split between Regular and Discount categories (37% and 38% respectively). Regional and VIP passes made up 25%. The City is required by the San Luis Obispo Council of Governments to honor Regional and VIP passes. The City is reimbursed for Regional pass rides at about 60% of the actual fare while there is no reimbursement for VIP pass riders as the pass enables the rider to use fixed route transit service for free (the pass is for seniors over the age of 80).

Weekend Service Options

Using the data from the North Coast Transit Surveys project and Morro Bay Transit on board surveys, several options with an 8 hours service day were identified and estimates for cost, fares and farebox ratio were developed, shown in Attachment 2. Essentially, there are 6 options for Saturday and Sunday service individually and the whole weekend, both for year round service and service on during the trolley off season (33 weeks per year).

An 8 hour day was selected for the options as the survey results did not yield an overwhelming winner in terms of the times during the day that would best serve the needs of the riders responding to the survey. The 8 hour day would also allow enough time for a resident to use RTA routes 12 or 15 to go to San Luis Obispo or north to San Simeon area and be able to return to Morro Bay and get back home.

1. **Option 1 - Year round, Saturday only, 8 hour day:**
    - Estimated Cost: $15,271
    - Estimated Fares: $1,567
    - Estimated 10.3% farebox ratio

    While the request from Council was to examine options for weekend service during the trolley off season, staff included an option for year round Saturday service as the Call-A-Ride service on the deviated fixed route would be available for those riders who are not able to walk to a trolley stop during the trolley season. The trolley is a fixed route only and does not deviate off route for curb-to-curb service.

    Offering year round service would allow for all current users of Morro Bay Transit to be able to use Saturday service, including those in the Beach Tract, Radcliffe area or south end of town who have no trolley service in that area, or the north end of town a couple of blocks off of Main Street, not just those who live near and can walk to a trolley stop.

2. **Option 2 - Year round, Sunday only, 8 hour day:**
    - Estimated Cost: $15,271
    - Estimated Fares: $784
    - Estimated 5.1% farebox ratio

    As with Option 1, a year round Sunday service option was included as the Call-A-Ride service on the deviated fixed route would be available for riders who are not able to walk to a trolley stop during the trolley season.

    As with Option 1, offering year round service would allow for all current users of Morro Bay Transit to be able to use Saturday service, including those in the Beach Tract, Radcliffe area or south end of town who have no trolley service in that area, or the north end of town a couple of blocks off of Main Street, not just those who live near and can walk to a trolley stop.

3. **Option 3 - Trolley Off Season, Saturday only, 8 hour day:**
    - Estimated Cost: $9,988
    - Estimated Fares: $995
    - Estimated 10.0% farebox ratio

This option would provide for Saturday service during the trolley off season from the 2nd week in October to the weekend before Memorial Day weekend.

4. **<u>Option 4 - Trolley Off Season, Sunday only, 8 hour day</u>:**
    - Estimated Cost: $9,988
    - Estimated Fares: $497
    - Estimated 5.0% farebox ratio

    This option would provide for Sunday service during the trolley off season from the 2nd week in October to the weekend before Memorial Day weekend.

5. **<u>Option 5 – Year Round Saturday and Sunday, 8 hour days</u>:**
    - Estimated Cost: $28,359
    - Estimated Fares: $2,351
    - Estimated 8.3% farebox ratio

    This option would provide for year round Saturday and Sunday service.

6. **<u>Option 6 – Trolley Off Season Saturday and Sunday, 8 hour days</u>:**
    - Estimated Cost: $11,426
    - Estimated Fares: $1,492
    - Estimated 8.2% farebox ratio

    This option would provide for Saturday and Sunday service during the trolley off season from the 2nd week in October to the weekend before Memorial Day weekend.

Fare estimates were based on an estimate of riders who would use the weekend service and would be newly generated rides, not trips that are being shifted from the weekday to the weekend. In other words, a rider using transit for the same number of trips each week but now that weekend service is available, the rider would still take the same number of trips, but just shift the day in the week when those rides occur.

This occurred with the former Dial-A-Ride service when Saturday was added resulting in lower ridership numbers than anticipated for the added service and negatively impacting the farebox ratio due to lower fares being generated. It is likely this would occur again with adding weekend service; however, it will not be known what that actual impact may be until the weekend service is operating.

For this reason, staff is recommending that any weekend option selected be on a one year trial basis with a review after 6 months to determine actual ridership and to what extent the shift in trips is occurring that would impact the amount of fares generated and negatively impact the farebox ratio.

Transportation Development Act Farebox Ratio Requirement

The Transportation Development Act (TDA) requires the City maintain a 10% farebox ratio for transit services it provides using TDA funds. Falling below the 10% ratio would trigger the assessment of a resulting in the loss of some of the Local Transportation Fund (LTF) monies the City receives for transit services. The penalty is calculated by taking the difference between the fares collected and the fares that should have been collected to reach the 10% ratio.

According to the FY 2011/2012 annual TDA audit, the City was at 10.7% and in compliance. The FY 2012/2013 audit is just about to start and will be completed in the next couple of months with a new farebox ratio being calculated to determine continued compliance.

CONCLUSION

Weekend options 2, 4, 5 and 6 are not estimated to meet a 10% farebox ratio and are not being recommended by staff to implement as they would result in the transit system's overall farebox ratio to fall below 10% and risk losing LTF funds that are used to provide Morro Bay Transit, Trolley and Senior Bus (currently in development) services.

Of the remaining options, 1 and 3, both are projected to just reach the 10% farebox ratio threshold, barring enough of a shift in when existing trips are being taken that fares are lower than projected and the farebox ratio falls below 10%.

As mentioned previously, offering year round service would allow for all current users of Morro Bay Transit to be able to use Saturday service, including those in the Beach Tract, Radcliffe area or south end of town who have no trolley service in that area, or the north end of town a couple of blocks off of Main Street, not just those who live near and can walk to a trolley stop.

Staff recommends the Board do the following:

1. Consider the options for weekend Morro Bay Transit service;
2. Recommend the City Council expand transit service on Saturdays, year round, for an 8 hour day, beginning July 1, 2014;
3. Recommend the City Council authorize the allocation of $15,300 from the FY 13/14 Transportation Development Act funds for Saturday year round service; and
4. Recommend the City Council implement the weekend service on a trial basis for one year with a review of actual ridership and farebox ratio impact after 6 months.

ATTACHMENTS

1. Morro Bay Transit On Board Survey Results
2. Weekend Service Options - Cost, Fare and Farebox Ratio Estimates
3. Morro Bay Transit Route Map
4. Morro Bay Trolley Route Map

Attachment 1

Morro Bay Transit - On Board Survey

September 2013

Total Surveys Returned: 57 — 48 English, 9 Spanish

1 If Morro Bay Transit added weekend service, would you use it?

57	100%	Yes
	0%	No

2 If yes, how often would you use Morro Bay Transit on the weekends?

45	79%	Every weekend
10	18%	Once or twice a month
2	4%	Other
		1 Weekdays
		1 Unknown
0	0%	Once a month

3 If yes, which day(s) would best serve your transit needs?

51	66%	Saturday
26	34%	Sunday

4 If yes, what would be the purpose of your trips(s)?

45	29%	Shopping
30	19%	Recreation or social activity
28	18%	Connect with regional fixed route 12 or 15 bus
23	15%	Library
20	13%	Work
8	5%	Other
		3 Church
		1 Embarcadero
		1 To festivals
		1 All the weekend activities
		1 Appointment

5 If yes, what time(s) during the weekend would best serve your transit needs?

35	20%	9-10 AM
27	15%	11 AM - 12 PM
27	15%	2-3 PM
24	14%	10-11 AM
25	14%	12-1 PM
24	14%	1-2 PM
13	7%	Other
		1 1% 6-9 AM
		1 1% 3-6 PM
		1 1% 3-6:45 PM
		2 1% 3-4 PM
		1 1% 8 AM
		1 1% 4-5 PM
		1 1% Meet #12 at Park at 4:55 Pm and 7:55 PM
		6 3% All day
		1 1% 6-9 PM

6 What fare do you currently pay for weekday service?

23	38%	Discount fare
22	37%	Regular fare
10	17%	Regional pass
5	8%	VIP pass
		1 For #12

Additional Comments

1 A Thought: a longer wait at the City Park to catch the 12 coming from SLO

Attachment 2

Morro Bay Transit - Weekend Cost and Fare Estimates

(assumes July 1, 2014 start with new Transportation Development Act funding year)

	Option 1	Option 2	Option 3	Option 4	Option 5	Option 6
Cost Estimate	**Saturday Year Round 8 Hour Day (416 hours)**	**Sunday Year Round 8 Hour Day (416 hours)**	**Saturday Off Season 8 Hour Day (264 hours)**	**Sunday Off Season 8 Hour Day (264 hours)**	**Sat. & Sun. Year Round 8 Hour Day (832 hours)**	**Sat. & Sun. Off Season 8 Hour Day (528 hours)**
Vehicle Service Hours	$9,002	$9,002	$5,713	$5,713	$18,004	$11,426
Fuel	$3,786	$3,786	$2,402	$2,402	$7,571	$4,805
Maintenance	$300	$300	$190	$190	$599	$380
Advertising	$2,184	$2,184	$1,683	$1,683	$2,184	$1,683
Cost Estimate:	**$15,271**	**$15,271**	**$9,988**	**$9,988**	**$28,359**	**$18,294**

Fare Estimate	**Option 1**		**Option 2**		**Option 3**		**Option 4**		**Option 5**		**Option 6**	
Total Estimated Riders[1]	1664		832		1056		528		2496		1584	
Estimated Regular	616	$ 924	308	$ 462	391	$ 586	195	$ 293	924	$ 1,385	586	$ 879
Estimated Discount	632	$ 474	316	$ 237	401	$ 301	201	$ 150	948	$ 711	602	$ 451
Estimated Regional Pass[2]	283	$ 170	141	$ 85	180	$ 108	90	$ 54	424	$ 255	269	$ 162
Estimated VIP[3]	133	$ -	67	$ -	84	$ -	42	$ -	200	$ -	127	$ -
		$ 1,567		**$ 784**		**$ 995**		**$ 497**		**$ 2,351**		**$ 1,492**
Estimated Farebox Ratio[4]:		**10.3%**		**5.1%**		**10.0%**		**5.0%**		**8.3%**		**8.2%**

[1]Industry standard: Saturday ridership is half of weekday ridership; Sunday ridership is half of Saturday ridership.

[1R]ider fare category breakdown based on the on board survey responses for weekend service.

[2]City required by SLOCOG to honor Regional Passes and receives approximately 60% fare reimbursement for each rider.

[3]City required by SLOCOG to honor VIP passes (seniors over 80) and received no fare reimbursement as these are free rides.

[4]State requirement for Transportation Development Act funds is 10% ratio.

ATTACHMENT 3

MORRO BAY TRANSIT

Effective 8/14/13 through 6/30/14

FARE INFORMATION

Fare is on a per ride basis

- Fixed Route - $1.50
- Discount Fixed Route* - 0.75
- Call-A-Ride - $2.50

Children under 5 years old ride the fixed route free with a fare paying adult (limit 2).

PASS INFORMATION

Day Pass:

- Fixed Route - $4
- Discount Fixed Route* - $2

Punch Pass: 11 rides

- Fixed Route - $15.00
- Discount Fixed Route* - $7.50
- Call-A-Ride - $25

The Fixed Route will accept Regional 31 Day and Day Passes.

*Seniors (65 & over) and disabled individuals are eligible for the discount fare.

Please carry exact fare. Drivers do not make change.

Days and Hours

Monday through Friday
6:25 a.m. - 6:45 p.m.

Fixed Route Stops

*Bus stop times are shown in minutes on the hour during service hours.

1. Main at Bonita
2. Main at Spencer's Market
3. Main at Sequoia
4. Main at Jamaica
5. Main at Tahiti
6. Beachcomber at Mindoro (stairs to campground)
7. Sandalwood at San Jacinto (beach access)
8. Atascadero at 200 Block (Teen Center; High School)
9. Atascadero at Morro Dunes
10. Atascadero at 300 Block (Motel 6)
11. Quintana at Cookie Crock
12. Quintana at Albertson's
13. City Park at Harbor
14. Piney Way at Anchor
15. Market at Morro Bay Blvd. (Centennial Stairway)
16. Community Center/Senior Center
17. Main at Errol

You may board or leave the bus at any point along the route where the driver can make a safe stop, but it is recommended catching the fixed route bus at the designated bus stops.

Call-A-Ride ~ 772-2744

Call-A-Ride curb-to-curb service is available to everyone. The fixed route bus will flex off route up to 3/4 of a mile to pick up/drop off the rider, then return on route before the next scheduled stop. **Be ready when the bus arrives by being out at the curb at your scheduled pick up time.**

To schedule a Call-A-Ride trip, call between the hours of 8 a.m. to 10 a.m., Monday through Friday, to schedule a ride for the next day. Monday trips will need to be scheduled on the Friday before.

Transit Connections

The Fixed Route connects with the Regional Transit Authority north coast routes at City Park. In addition, during the trolley season, the Fixed Route connects with trolley routes at City Park and at the Centennial Stairway on Market Street.

Holidays

Fixed Route and Call-A-Ride service is not available on City observed holidays.

Bag Limit

Due to limited space in the bus, each passenger may bring either 2 paper or 3 plastic bags on board the bus.

Bicycle Racks

The bus is equipped with a bicycle rack for your use. Space is on a first come, first served basis. Passengers are responsible for both loading and unloading the bicycle from the rack.

Please signal to the driver that you will be loading your bicycle. Also, when exiting the bus, remind the driver that you will be unloading your bicycle from the rack.

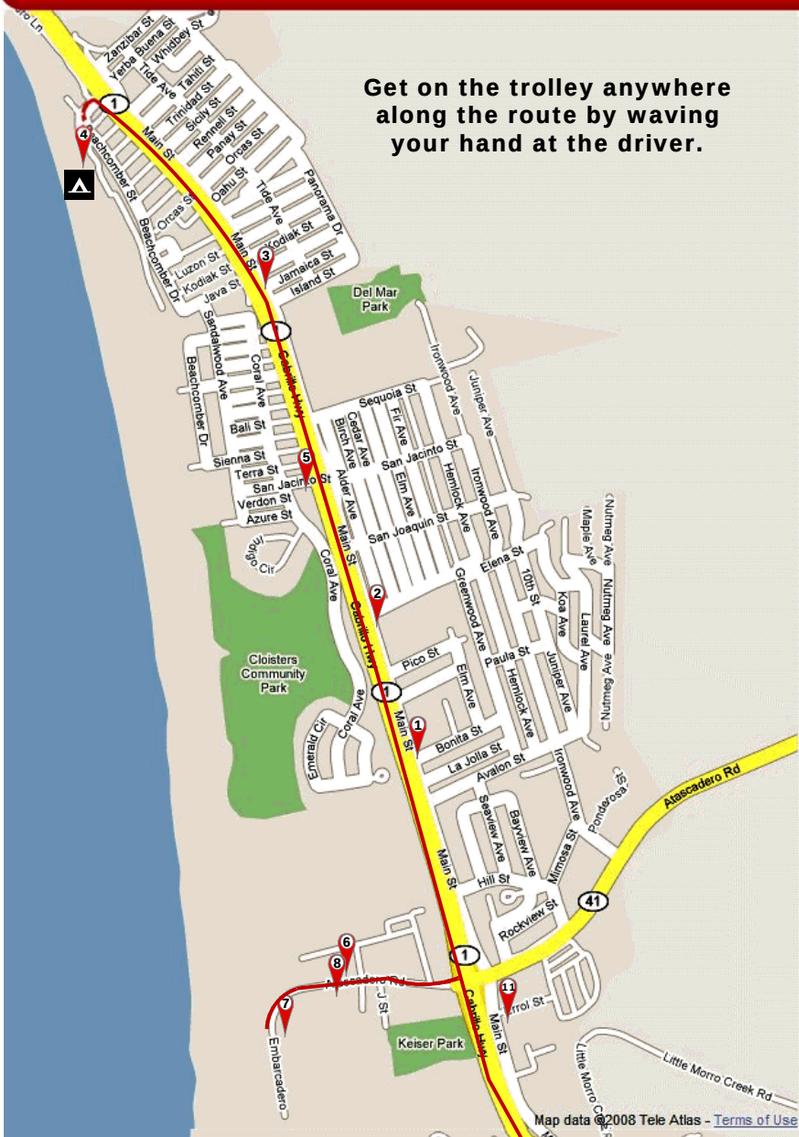
The City is not responsible for bicycles left on or for damages arising from bicycles not properly affixed to the rack.

No bicycles will be allowed inside the bus.

morro-bay.ca.us/mbt
(805) 772-2744

ATTACHMENT 4

MORRO BAY TROLLEY



North Morro Bay Route

Approximate 1 hour loop

1. Main at Bonita
2. Main at Elena
3. Main at Jamaica
4. Morro Strand State Park Campground
5. Hwy 1 at San Jacinto
6. Atascadero at 200 Block (northside)
7. Atascadero at Morro Dunes
8. Atascadero at 200 Block (southside)
9. Market at Morro Bay Blvd. (transfer point to Waterfront and Downtown routes)
10. City Park at Harbor (transfer point to Downtown route & Regional Transit Service Route 12)
11. Main at Errol

Downtown Route

Approximate 30 minute loop

1. Shasta at Kennedy Way
2. City Park at Harbor (transfer point to North Morro Bay route & Regional Transit Service Route 12)
3. Morro Bay Blvd. at Napa
4. Morro Bay Blvd. at Monterey
5. Morro Bay State Park Campground
6. Main at Pacific
7. Market at Morro Bay Blvd. (transfer point to Waterfront and North Morro Bay routes)
8. Morro Bay Blvd. at Main
9. Morro Bay Blvd. at Napa

Waterfront Route

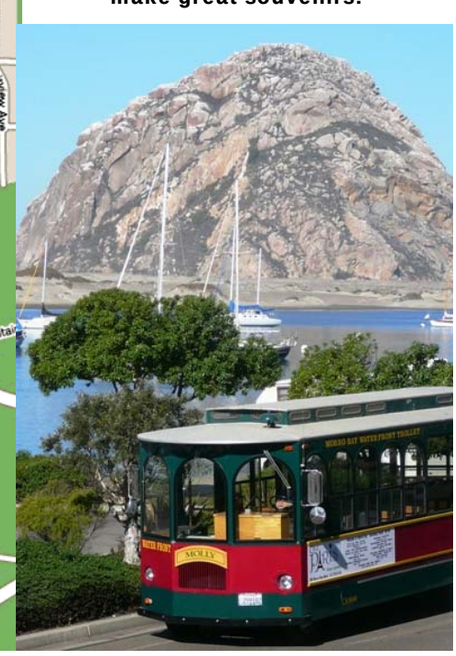
Approximate 20 minute loop

1. Embarcadero at Front
2. Morro Rock
3. Embarcadero at Coleman Beach
4. Embarcadero at Beach
5. Embarcadero at Harbor
6. Embarcadero at Pacific
7. Embarcadero at Marina
8. Tidelands Park
9. Embarcadero at Driftwood
10. Embarcadero at Giant Chessboard
11. Market at Morro Bay Blvd. (transfer point to North Morro Bay and Downtown routes)

50¢
Child 5-12 yrs. old
$1.25
13 yrs. and older
$3
All Day Pass

Children under 5 ride free (limit 2 per fare paying rider)

Wooden Trolley Tokens make great souvenirs!



DAYS AND HOURS

Memorial Day weekend through 1st weekend in October*

Friday	11 a.m. - 7 p.m.
Saturday	11 a.m. - 7 p.m.
Sunday	11 a.m. - 6 p.m.
Monday	11 a.m. - 5 p.m.
Holidays	11 a.m. - 6 p.m.

4th of July
11 a.m. to approximately one hour after fireworks

***Friday & Monday operate Memorial Day through Labor Day only.**

For more information call 772-2744
morro-bay.ca.us/trolley

AGENDA NO: C-2

MEETING DATE: November 4, 2013

Staff Report

TO: **Public Works Advisory Board** **DATE: October 30, 2013**

FROM: **Rob Livick, PE/PLS – Public Services Director/City Engineer**

SUBJECT: **Public Draft Options Report for the NEW Water Reclamation Facility (WRF)**

RECOMMENDATION

Receive the report, take public testimony, and forward any recommendations or coments to the City Council.

FISCAL IMPACT

The preliminary cost estimates for the development, design, permitting and construction of a new WRF range from $90 to $160 million depending on the site. These costs include a 30-percent contingency and a 30-percent allowance for engineering, environmental review, permitting and other required "soft costs". At this point in the process this is as accurate as we can estimate costs. Once a site is selected and preliminary engineering is performed, then the cost estimates can be refined.

DISCUSSION

At the January 10, 2013 California Coastal Commission (CCC) meeting, the CCC voted to deny the Coastal Development Permit (CDP) for construction of an upgraded wastewater treatment plant (WWTP) at its existing location. In summary, the basis for denial included: Local Coastal Plan - Zoning inconsistency, failure to avoid coastal hazards, failure to include a sizable reclaimed water component and the project is located within an LCP-designated sensitive view area.

Project Planning has begun based on community values, for the NEW Water Reclamation Facility (WRF). The City has developed a tentative schedule for the preliminary work effort for the WRF. This charts a path of site selection and other important community decisions that are needed to see the WRF project move forward with success. The Council's goal is to make these decisions by the end of 2013.

We are now at a major point in the preliminary work effort for the planning of a WRF project, the public release of the draft *Options Report*. The purpose of the report is to provide information to assist the community through the City Council in making a decision about an appropriate location to build a new WRF that will ultimately replace the City's existing Wastewater Treatment Plant. The plan also addresses available treatment technology, the use and disposal of biosolids, reclamation and disposal options.

The report is based on a review of existing technical studies and recent public input, which, when collectively considered in the context of newly developed technical information, will allow the community to

Prepared By: RL Dept Review: RL

understand the rationale contained in the report recommendations.

Once the City Council chooses a site, the next steps would include acquiring the site, gaining the support of the Coastal Commission to pursue development on the site, and the creation of potential designs for the facility, as well as developing a plan to finance and pay for the new facility. This would be followed by environmental review under the California Environmental Quality Act (CEQA)/National Environmental Protection Act (NEPA), permitting as needed, annexation (if necessary), and ultimately construction and operation. These future actions are beyond the scope of this study.

CONCLUSION

The Board should take public testimony, and provide any recommendations or comments to staff who will forward to the consultant team and the City Council.

ATTACHMENTS

1. WRF Draft Options Report - Executive Summary
   For the complete report go to: http://www.morro-bay.ca.us/documents/9/39/269/WRF%20Draft%20Options%20Report%2010_29_13_201310291152571480.pdf

City of Morro Bay
New Water Reclamation Facility Project
First Public Draft Options Report

1. Purpose of the Report

The purpose of this report is to provide information that assists the City Council in making a decision about an appropriate location to build a new Water Reclamation Facility (WRF) to replace the City's existing Wastewater Treatment Plant. The report is based on a combination of existing technical studies and recent public input, which, when collectively considered in the context of newly developed technical information, will allow the community to understand the rationale behind the recommendations contained in this report.

This is a comparative siting study that considers a combination of environmental, logistical, engineering and economic factors. It is not a technical or engineering analysis. It is not intended to design a project, or even locate the new project within a specific parcel. It is planning-level information that begins a series of actions leading to the eventual construction and operation of a new facility. It is not intended to repeat the work done in the previous rough and fine screening evaluations, particularly the exhaustive policy analysis contained in those documents. Those documents are included in this new study by reference, and where the analysis in this new study differs from the conclusions of those previous studies, it will be so noted.

Once the City Council chooses a site, the next steps would include acquiring the site, gaining the support of the Coastal Commission to pursue development on the site, and the creation of potential designs for the facility, as well as a plan for paying for that facility. This would be followed by environmental review under the California Environmental Quality Act (CEQA), resource regulatory agency permitting as needed, annexation (if necessary), and ultimately construction and operation. These future actions are beyond the scope of this study.

This report includes extensive information about different technologies that could be applied to the project design, discussing the pros and cons, cost and siting ramifications, and the effectiveness of such technologies relative to treating wastewater to tertiary standards and beyond. This information is found in **Appendix A**. The report also discusses options on how to dispose of or use biosolids that are byproducts of wastewater treatment (**Appendix B**). This information is intended to help the City Council make an informed decision about the most appropriate site. It is important to note that the Council will not be asked to make a decision about which technologies to apply in designing the new WRF—that is more appropriately left to a project designer responding to the stated goals for the new facility. Instead, the Council will be asked to provide direction regarding the following:

- *The overall goals for the new WRF relative to:*
    - *the level of wastewater treatment;*
    - *goals for the use of reclaimed water;*
    - *goals for the beneficial reuse of biosolids;*
    - *the timing and schedule of meeting these goals; and*

- *An appropriate location for such a facility*

From there, this information will be provided to potential design consultants, who will propose on the project and recommend an appropriate approach to meet these goals. The best design will be the one that balances the long-term utility of the facility, expandability as needed, the use of appropriate technologies to achieve the City's stated goals, and lifecycle cost.

2. Executive Summary

Broadly speaking, the new WRF is intended to accomplish several goals, including the following:

- Production of tertiary, disinfected wastewater in accordance with Title 22 requirements for unrestricted urban irrigation
- Designed to be able to produce reclaimed wastewater for potential users, which could include public and private landscape areas, agriculture, or groundwater recharge
- Onsite composting
- Energy recovery
- Ability to treat contaminants of emerging concern in the future

Seven sites are examined in this report relative to their ability to meet these goals, which represent a reconfiguration of many (but not all) of the 17 sites examined in the 2011 Rough Screening Evaluation. They range in size, and the number of properties included in each, based on factors described in this report. These sites include:

- Site A (Chevron)
- Site B (Morro Valley)
- Site C (Chorro Valley)
- Site D (CMC Wastewater Treatment Plant Site)
- Site E (Power Plant—southern portion of property)
- Site F (Panorama)
- Site G (Giannini)

Note that the existing Wastewater Treatment Plant Site was removed from consideration as a result of the California Coastal Commission's January 2013 denial of a new facility at that location.

Table ES-1 summarizes the sites as they are studied in this report, which are shown in Figure 1.

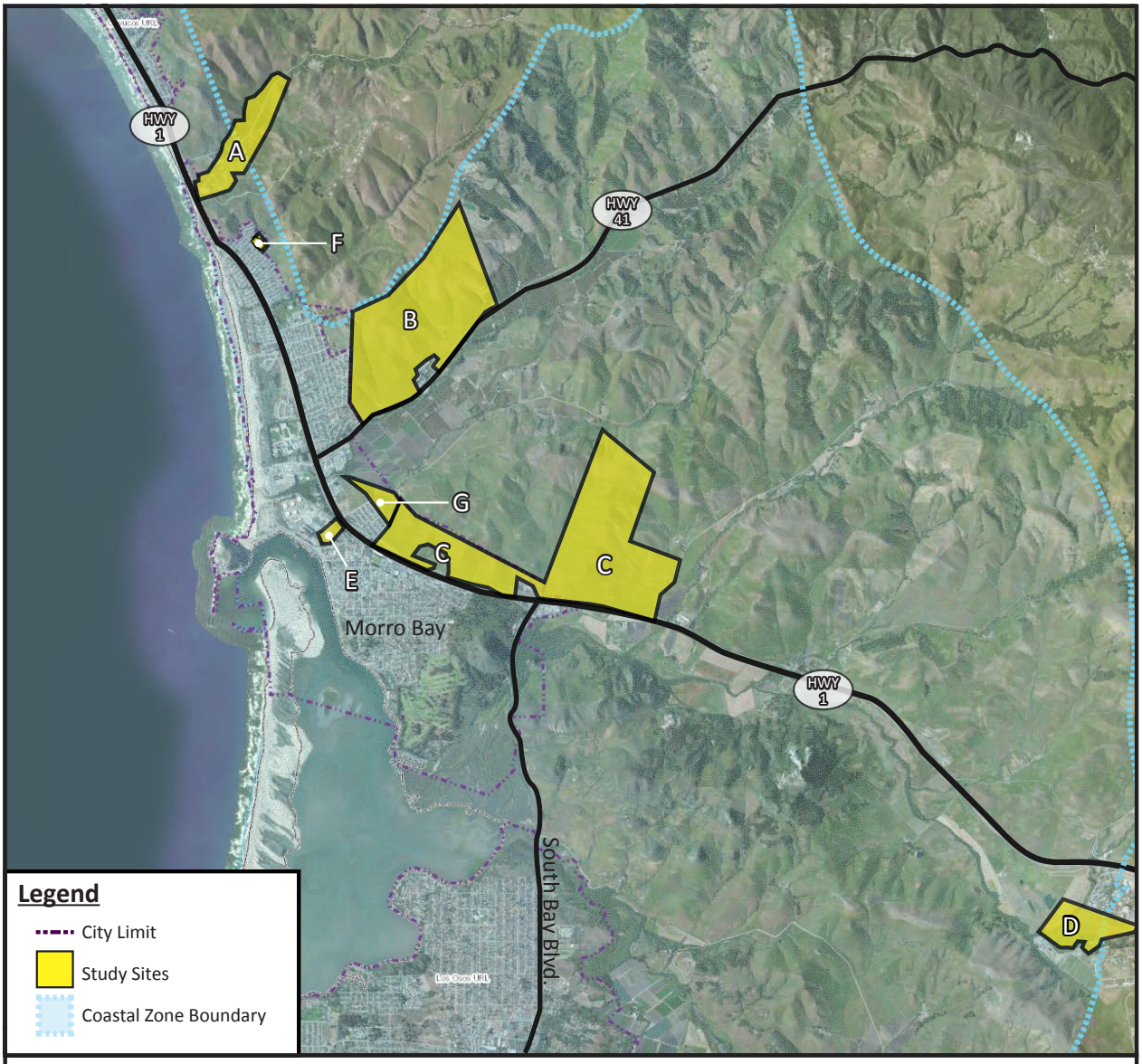


Figure 1: Overview of Study Sites

JFR
PLANNING AND ENVIRONMENTAL CONSULTING

Note: Map data obtained from County Assessor's mapping database

0 0.4 0.8mi

N

Study Sites Legend

Site A (Chevron)
Site B (Morro Valley)
Site C (Chorro Valley)
Site D (CMC Wastewater Site)
Site E (Power Plant - southern portion of property)
Site F (Panorama)

Table ES-1. Sites Examined in the Report

Site	Site Name for this Report	Includes these sites, as identified in the Rough Screening Evaluation	Also includes these parcels, not previously studied	Discussion
A	Chevron	5, 15 APN 073-075-004 (13.3 ac) Ownership: Standard Pipeline APN 073-075-008 (14.2 ac) APN 073-075-010 (5.6 ac) APN 073-077-034 (126.8 ac) Ownership: Chevron USA	None	Originally combined in the 2012 Dudek Fine Screening Report. Logical framework because of common ownership, and offers potential multi-agency advantage because of proximity between Morro Bay and Cayucos. These sites are not within the City limits.
B	Morro Valley	10, 16 (Rancho Colina; Righetti) APN 073-085-027 (187.4 ac) Ownership: W. Macelvaine APN 073-084-013 (259.3 ac) Ownership: C. Righetti	APN 073-085-019 (40.4 ac) Ownership: F. Bunting et al APN 073-085-018 (176.3 ac) Ownership: L. Foster	Several Morro Valley sites share common characteristics, such as proximity to avocado orchards (possible water reuse customer), as well as similar soils and infrastructure connectivity to the rest of the City. This includes several relatively unconstrained sites along Highway 41 generally north of Morro Creek that include sufficient land area lower than 250 feet above sea level. None of these sites are in the City limits.
C	Chorro Valley	2 APN 068-411-006 (5.6 ac) Ownership: D. Shepard APN 068-411-007 (45.5 ac) Ownership: Seashell Communities Asset *(these parcels are in the City)*	APN 068-401-013 (157.5 ac) Ownership: Tri-W Enterprises *(this parcel is in the City)* APN 073-121-022 (436.4 ac) APN 073-121-024 (138.3 ac) Ownership: J. Maino *(these parcels are located in the County)*	These parcels share common features, such as proximity to Chorro Creek and the Morro Bay estuary, which offer possible recharge opportunities for habitat. These sites have common infrastructure linkage potential to the City along Highway 1 relatively near (or in) the City limits.
D	CMC	12 APN 073-221-028 (118.94 ac) Ownership: State of California	None	This is the only site adjacent to an existing treatment facility, and it has multi-agency cost-sharing potential. At the same time, it is the farthest from the City. While in the Chorro Valley, its distance from the City may present challenges with respect to the cost of extending infrastructure as compared to the "Chorro Valley" sites described above. There may be potential to recharge Chorro Creek and the bay, similar to the "Chorro Valley" sites.
E	Power Plant	7 (southern portion only) APN 066-331-039 (92.9 ac) Ownership: Dynegy Morro Bay	None	This site has unique characteristics. Only the southernmost 12 acres of this property will be considered, as the rest exhibits fatal flaws as noted previously. It is within the City, and

Table ES-1. Sites Examined in the Report

Site	Site Name for this Report	Includes these sites, as identified in the Rough Screening Evaluation	Also includes these parcels, not previously studied	Discussion
		(only the southern 12-acre portion of this site is included in the analysis)		located in an area with extensive existing infrastructure. This portion of the site is mostly undeveloped in an upland location.
F	Panorama	9 APN 065-038-001 (9 ac) Ownership: CVI Group, LLP	None	This site's north Morro Bay location within the City limits offers some increased potential for a multi-agency partnership with Cayucos. It also has some locational constraints with respect to its proximity to existing residential neighborhoods.
G	Giannini	17 APN 068-401-011 (17.8 ac) Ownership: J. and E. Giannini	None	This site sits in an upland area overlooking the Morro Valley south of Morro Creek, and as such does not easily fit into the "Morro Valley" locations described as "Site B", which are farther inland across the creek on the north side of the highway. Thus, it is considered by itself in this report.

These sites were analyzed based on a variety of factors, which were identified and prioritized in part through a public outreach process that included stakeholder interviews and a workshop. The issues, and relative weighting used, are summarized in Table ES-2. The input received during the public outreach process is summarized in **Appendix C**.

Table ES-2. Summary of Issues and Weighting Used in This Report

Major Issue	Sub-Issue within Major Issue	Relative Weight (1-10; 10 highest)	Relative Weight Converted to % within Major Issue	Total Weight (% Issue Weight x % Sub-Issue Weight)
Environmental: 28.6%				
	Avoid Coastal Hazards	8	10.7%	3.1%
	Avoid Steep Slopes and High Elevation	3	4.0%	1.1%
	Promote Public Access/Recreation	5	6.7%	1.9%
	Minimize Visual (and other proximity) Impacts	10	13.3%	3.8%
	Sustainable Use of Public Resources	10	13.3%	3.8%
	Avoid Environmentally Sensitive Habitat Areas	8	10.7%	3.1%
	Avoid Cultural Resources	7	9.3%	2.7%
	Avoid Agricultural Resources	8	10.7%	3.1%
	Promote Coastal Dependent Development	6	8.0%	2.3%
	Minimize Carbon Footprint	7	9.3%	2.7%
	Minimize Traffic	3	4.0%	1.1%
	Subtotal all Environmental Issues		*100.0%*	*28.6%*
Logistics: 14.1%				
	Complies with NPDES Permit Requirements	10	27.8%	3.9%
	Minimizes Project Implementation Schedule	8	22.2%	3.1%
	Ease of Property or Right-of-Way Acquisition	7	19.4%	2.7%

Table ES-2. Summary of Issues and Weighting Used in This Report

Major Issue	Sub-Issue within Major Issue	Relative Weight (1-10; 10 highest)	Relative Weight Converted to % within Major Issue	Total Weight (% Issue Weight x % Sub-Issue Weight)
	Configuration and/or Expandability of the Site	8	22.2%	3.1%
	Multi-Agency Use Potential	3	8.3%	1.2%
	Subtotal all Logistics Issues		*100.0%*	*14.1%*
Engineering and Design: 27.1%				
	Minimizes Distance for City Collection System	7	21.2%	5.8%
	Minimizes Distance to Direct or Indirect Reuse	7	21.2%	5.8%
	Ability to Use a Range of Treatment Technologies	8	24.2%	6.6%
	Ability to Include Multiple Functions	4	12.1%	3.3%
	Ability to Remove Contaminants of Emerging Concern	2	6.1%	1.6%
	Potential to Generate Energy and Revenue	5	15.2%	4.1%
	Subtotal all Engineering and Design Issues		*100.0%*	*27.1%*
Cost: 30.2%				
	Minimizes Capital Costs	6	26.1%	7.9%
	Minimizes Operating Costs	7	30.4%	9.2%
	Minimizes User Cost (increases to monthly bills)	10	43.5%	13.1%
	Subtotal all Cost Issues		*100.0%*	*30.2%*
All Issues: 100%				**100.0%**

Note: As a sample calculation, the weighting for "Avoid Coastal Hazards" was derived as follows. The factor weight (8) was converted to a relative weight among all environmental sub-issues (by dividing 8 by the combined total of all weights of all environmental sub-issues, or 8/75, or 10.7%). This was then multiplied by the weight of the Environmental issue category (28.6%) relative to the other major issues (such as cost and logistics) to get a total weight among all factors. In this case, the calculation is 0.107 x 0.286 = 0.0306, or 3.1%.

Each site was then analyzed relative to these issues. Site E (Power Plant Site) received the highest overall score, receiving a score of 8.07 out of 10, and is thus the highest rated site. The other six sites received scores between 5.01 and 7.72. While Site E is ranked highest, it is not the only site that merits consideration by the City Council. The Morro Valley Site (Site B) ranked a clear second, and would be a solid choice when all factors are considered together. Within Site B, the Righetti property has the most promise because it is the closest property to the City, which would minimize the cost of extending infrastructure to some extent. Site B is also close to potential reuse opportunities, notably irrigated agriculture along Highway 41.

Table ES-3 analyzes each site and in more detail in order of ranking, why the sites ranked where they did, and summarizes the strengths and weaknesses of each. The scores shown are on a sale of 1 to 10, with 10 being the highest.

Table ES-3. Summary Analysis of Site Rankings

Rank	Site	Score	Discussion
1	Site E: Power Plant Site	8.07	Received the highest overall score, and the main reason is its substantially lower cost than any other site. If cost were not a factor, the site would rank a close second behind Site B (Morro Valley), and receive a similar score as Site C (Chorro Valley). Site E and Site B received very similar and relatively high scores in the

Table ES-3. Summary Analysis of Site Rankings

Rank	Site	Score	Discussion
			Environmental/LCP category. The primary advantages of this site are: • By far the lowest cost because of its proximity to existing wastewater infrastructure; • Relatively free of LCP constraints—above the 100-year flood zone; no agricultural soils; no ESHA; • Development would not be visible from Highway 1 or the ocean or bay, and would not block existing previously impaired ocean views from homes on Scott Street because of downhill location; • Has excellent potential to access two major water reuse opportunities—Morro Valley agriculture and Chorro Valley groundwater recharge; • Is located on an undeveloped portion of an existing industrial site • Has sufficient area to allow for flexibility in design The primary challenges associated with this site are: • Possible political perception that it may have constraints because of its location relatively near the coast; • Proximity to several houses across Scott Street, which may result in short-term nuisance impacts during construction, odors, and potential long-term issues related to views, all of which will need to be addressed through the design; • It is not known whether Site E requires remediation from past industrial uses associated with the nearby power plant and oil tank farm; • There are significant cultural resources on the site
2	Site B: Morro Valley	7.72	Ranked a close second, and had a good balance of scores relative to environmental, engineering and cost issues. Had the highest overall score for environmental and engineering issues, and ranked second in estimated costs. Has excellent reclamation potential because of proximity to irrigated agriculture along Highway 41. The primary advantages of this site are: • Proximity to possible reclamation opportunities—irrigated agriculture along Highway 41; • Properties are large and allow for flexibility in design, as well as expansion potential; • Minimizes coastal policy impacts because of inland location; • Relatively lower cost compared to most sites, with the exception of Site E. The primary challenges associated with this site are:

Table ES-3. Summary Analysis of Site Rankings

Rank	Site	Score	Discussion
			• Need to extend infrastructure up Highway 41—the farther, the more expensive it will be; • Potential impacts to prime farmland on parts of some properties; • Limited site locations because of slopes and rising elevation along Highway 41
3	Site C: Chorro Valley	7.01	Ranked slightly higher than the Giannini and Chevron sites. Ranked lower than Morro Valley mainly because of cost considerations, otherwise similar in other respects. Reuse opportunities may be available if there are no conflicts with nearby water wells, related primarily to groundwater recharge and potential habitat enhancement along the Chorro Creek watershed. However, if these are the primary reuse opportunities for this site, then project costs and permitting timeframe will be higher than other sites with adjacent, direct reuse opportunities such as irrigation. The primary advantages of this site are: • Proximity to possible wastewater reuse opportunities—groundwater recharge or habitat enhancement along Chorro Creek and the Morro Bay estuary; • Minimizes coastal policy impacts because of inland location The primary challenges associated with this site are: • Need to extend infrastructure up Highway 1—the farther, the more expensive it will be; • Somewhat higher cost compared to most other sites; • Limited site locations because of slopes and rising elevation along Highway 1 • Potential visual impacts from Highway 1 • Proximity to homes along Downing Street (Tri-W parcel only) may result in visual and nuisance impacts
4	Site G: Giannini Property	6.92	Ranked between the Chorro Valley and Chevron sites. In many respects, has some of the advantages of the Morro Valley site, including proximity to irrigated agriculture for potential water reuse. Proximity to residential neighborhood, slopes and difficult site configuration are challenges at this location. In the middle of the pack in terms of cost. The primary advantages of this site are: • Proximity to possible reclamation opportunities—irrigated agriculture along Highway 41; • Minimizes coastal policy impacts because of inland location; The primary challenges associated this site are: • Proximity to residential area;

Table ES-3. Summary Analysis of Site Rankings

Rank	Site	Score	Discussion
			• Difficult site configuration because of slope; • Cultural resources are present on site; • Truck traffic associated with sludge removal could be an issue if routed through neighborhood
5	Site A: Chevron	6.85	Ranked slightly lower than Chorro Valley and Giannini sites. Primary advantage is that it is an existing industrial property that has multi-agency use potential with Cayucos. Distance from reclamation opportunities are a substantial constraint, as is the likely difficulties associated with site acquisition, unless the WRF coincides with Chevron's long-range plans for reuse of its site. Several Coastal-related site constraints must be addressed, including ESHA, cultural resources, coastal views and prime agricultural lands. The primary advantages of this site are: • Existing industrial site without neighbors; • Highway truck access from biosolids removal is good; • Proximity to Cayucos if they become a partner agency; • Site previously studied extensively, so the constraints associated with the site are well-known, and can be avoided to a large extent. The primary challenges associated this site are: • Far from possible reclamation opportunities; • ESHA, Cultural Resources, Prime Agricultural land, and visual impacts all present constraints—limited locations where a new WRF can be built; • Site acquisition may be difficult unless City's interests are aligned with Chevron's
6	Site F: Panorama	6.44	Ranked relatively low because of difficult and constrained site near an existing neighborhood. Primary advantage is that it is in the City, and is used for non-residential purposes. The primary advantages of this site are: • Site is already in the City, and used for industrial purposes; • Far from coast, and would not block coastal views or access The primary challenges associated this site are: • Far from possible reclamation opportunities; • Visually prominent from many residential neighbors; • Small site, further constrained by flood plain and habitat issues ESHA; • Would require removal and clean-up of existing oil tanks; • Truck traffic would go through existing neighborhood

Table ES-3. Summary Analysis of Site Rankings

Rank	Site	Score	Discussion
7	Site D: CMC Wastewater Site	5.01	Ranked last because of extremely high capital and energy use costs, related primarily to distance from City. Certain perceived advantages (such as proximity to existing CMC WWTP) will not translate to cost savings, because existing plant is not expandable to serve the City. The site's proximity to Chorro Creek provides some water reuse opportunities. However, if these are the primary reuse opportunities for this site, then project costs and permitting timeframe will be higher than other sites with adjacent, direct reuse opportunities such as irrigation. The site has prime agricultural soils, but with limited production potential. The primary advantages of this site are: • Theoretical synergy with existing WWTP, in terms of sharing water reuse infrastructure; • No neighbors; • Site is on public land, which may provide opportunities for multi-agency cooperation; • Far from coast, and would not block coastal views or access; • Good access to Highway 1 for biosolids removal The primary challenges associated this site are: • Extremely high capital costs; • Uses for other types of public facilities (such as parks) may be limited since Department of Corrections site with controlled access. • Relatively higher need to acquire properties or rights-of-way to allow extension of infrastructure to City (because of distance to City); • High energy use and carbon emissions because of distance to city and pumping requirements; • Site includes prime agricultural soils

Based on the above analysis, this report recommends that either Site E (Power Plant) or Site B (Morro Valley) have the best potential for locating a new WRF. Both have challenges, but they also have substantial advantages over the other five sites. It should also be remembered that how the various factors are weighed is crucial in drawing these conclusions. Although subjective, public input played a key role in weighing these factors, modified by our teams' engineering and planning experience, as well as the technical information already available for many of the sites.

Relative to the issue of cost, the estimates used in this analysis are intended to be comparative in nature, appropriate for a siting study. Actual costs will depend on a detailed project design and work plan, as well as other issues related to financing, interest rates, phasing, and the timing and cost of regulatory agency permitting and review. None of these factors can be fully known at this time. The purpose of the Options Report provides a comparative framework for each site under consideration, to allow the City Council to understand the rough order of magnitude of costs that might be expected at the various sites, which can only be refined through more detailed design work.

AGENDA NO: C-3

MEETING DATE: November 4, 2013

Staff Report

TO: **Public Works Advisory Board** **DATE: October 30, 2013**

FROM: **Rob Livick, PE/PLS – Public Services Director/City Engineer**

SUBJECT: **Review of San Jacinto Street Parking and Striping**

RECOMMENDATION

Receive the options, take public testimony, and provide any recommendations or comments to staff.

FISCAL IMPACT

The potential cost for the any changes range from any of the potential short term measures range from a few hundred to a few thousand (widening of San Jacinto between Alder and Birch). The ultimate solution is the widening of San Jacinto and the installation of sidewalk to accommodate all users that cost is beyond the scope of this report and would likely be in the range of 500,000 - $600,000.

DISCUSSION

In the summer of this year, City staff met with representatives from Del Mar School, the community and SLOCOG to brainstorm a short term solution for a "*safe route to school*" prior to the beginning of this school year. With San Jacinto improvements being only 34-feet in width with no sidewalk, it is difficult to accommodate the needs of all users. The consensus of this ad hoc group was to create a plan for during school hours that would removing parking from San Jacinto between Alder and Greenwood Avenues and create a route for the pedestrian and bicyclists to commute to the school site, but allow parking after 4:00 P.M. and on the weekends. Along with these new features the City also planned to "refresh" existing striping and curb painting in the area.

During the development of the plan, city staff looked at the segment of San Jacinto between Alder and Birch Avenues and concluded, with existing funding, the City could install sidewalk and make drainage improvements to the South side of San Jacinto in this reach. Additionally, staff saw a way to accommodate parking along the South side of San Jacinto and still allow for bicyclists and this block long section of sidewalk. This accommodation required the elimination of the bicycle lane along the North side of San Jacinto and an offset centerline in this block.

After experiencing the improvements, over the past few weeks, staff has heard the following concerns from the neighbors and users of the route:

- Offset in the centerline in San Jacinto is confusing.

Prepared By: RL **Dept Review: RL**

- Parking in the block between Alder and Birch is hazardous to the cyclists.
- Parking is needed along San Jacinto.
- Sight distance problems with parking.
- The North Side of San Jacinto between Alder and Birch needs a striped bike lane
- Parking should be removed along the full length of San Jacinto not just during school hours to accommodate all pedestrians and cyclists, not just students

CONCLUSION

The San Jacinto corridor is designated as a Major Collector Street and needs to be able to accommodate all users as a complete street, including motorists, bicyclists and pedestrian traffic. The optimum solution to accommodate all the users is a street widening and the installation of sidewalk. Unfortunately, the ultimate solution cannot be funded with existing City resources. The City Engineer recommends the following changes in order to meet the best needs of all users:

1. Remove all on street parking along San Jacinto between Alder and Ironwood. This will not impact City Transit service as the buses stop, not park.
2. Add a bike lane to the North Side of San Jacinto between Alder and Birch Streets.
3. Restripe centerline to accommodate #2.
4. Look for additional funding to improve San Jacinto.

ATTACHMENTS

1. Aerial photo showing San Jacinto and surrounding area
2. Aerial photo showing San Jacinto – Alder to Main
3. Selection of terrestrial photographs

ATTACHMENT 1

Google Earth Pro

feet 800
meters 200

ATTACHMENT 2

Photo 1: San Jacinto at Alder looking Southwesterly

Photo 2: San Jacinto at Birch looking East

Photo 3: Alter at San Jacinto looking Northeasterly - sight distance problem

Photo 4: San Jacinto at Alder looking Southwesterly

Photo 5: San Jacinto at Birch looking West

Photo 6: San Jacinto at Alder looking West

Photo 7: San Jacinto At Alder looking Northeasterly

AGENDA NO: C-4

MEETING DATE: November 4, 2013

Staff Report

TO: **Public Works Advisory Board** **DATE: October 30, 2013**

FROM: **Rob Livick, PE/PLS – Public Services Director/City Engineer**

SUBJECT: **Formation of a PWAB Subcommittee for the preparation of a Request for Proposals and assistance in the selection of a Water and Sewer Rate Consultant**

RECOMMENDATION

Select two members to serve on the subcommittee.

FISCAL IMPACT

There is no fiscal impact as a result of this action.

DISCUSSION

At their October 22, 2013 City Council directed staff to bring this to the Board for the selection of a subcommittee to assist staff in the development of an Request for Proposals (RFP) for the selection of a consultant to study the Morro Bay water and sewer rates. This study would be presented to City Council to assist them in making decisions in the adjustment of water and sewer rates along with determining if the current rate structure is appropriate. Additionally, the rate consultant is to develop a rate review policy.

CONCLUSION

Base upon City Council direction the Board is directed to select a two member subcommittee for the purpose of advising staff regarding the development of an RFP and also assist in the consultant selection process.

ATTACHMENTS

1. Staff report for Item C-1 of the October 22, 2013

Prepared By: RL **Dept Review: RL**

AGENDA NO: C-1

MEETING DATE: October 22, 2013

Staff Report

TO: **Honorable Mayor and City Council** **DATE: October 17, 2013**

FROM: **Rob Livick, PE/PLS - Public Services Director/City Engineer**

SUBJECT: **Authorization to Issue a Request for Proposal (RFP) for a Rate Study for Water & Sewer Rates with Additional Background Information**

RECOMMENDATION

Authorize staff to prepare and issue an RFP and award a contract for the analysis of Water and Sewer rates for potential adjustments, in accordance with the City's Consultant Hiring Policy.

ALTERNATIVES

1. Direct staff to perform the rate study using existing City staff, by either
    a. Contract out other work to accommodate the resources required for the rate study, or
    b. Hire temporary staffing to accommodate the resources required for the rate study.

2. Defer the rate study until such time that the Department has sufficient resources to perform the study without impacting other priority projects.

FISCAL IMPACT

It is anticipated that the total cost to perform a cost of the services study and rate analysis for both water and wastewater rates should not exceed $75,000. The source of the funds would be the Water and Sewer accumulation accounts; and the cost of the study would be divided equally between the two funds.

SUMMARY

Both the water and sewer funds have upcoming required future expenses for which the current rate structures will not provide adequate funding. Additionally, the current rate structures of both revenue streams do not produce adequate funds to meet debt coverage ratios required by the State Revolving Fund (SRF) for future loans and the Central Coast Water Authority (CCWA), the State water provider, for the existing debt service for the State Water Project debt. In order to determine the rate requirements to support both the ongoing maintenance and operations along with the implementation of the Capital

Prepared by: __RL__ Dept. Review: RL__

City Manager Review:_____

City Attorney's Review:_____

improvement program, the rates need to be assessed to determine their adequacy. After the rate study has been performed, the community can decide how those costs will be distributed amongst the users.

BACKGROUND/DISCUSSION

On September 10, 2013 staff brought the issue of commencing a water and sewer rate study to City Council for their review and authorization. At that meeting staff received direction from the City Council to bring this item back with additional detail and information before they could consider embarking on a study of the adequacy of the City's water and sewer rate structure to support the needs of providing the service to the respective customers. The areas that the Council gave staff direction to provide additional detail were:

A. Review of the last twenty years of City Council's actions on water and sewer rates
B. Potential Rate Review Policy
C. Comparison between Morro Bay's rates and other area water and sewer providers
D. How the Water and Sewer rates Tie together
E. Historical Information Regarding Expenditures

A. History of Water and Sewer Rate Discussion/Action

The following table summarizes the City Council actions regarding water and sewer rates since 1994. In staff's research of the historical information it should be noted that sewer and water rates were reviewed and adjusted quite regularly and during some periods annually since incorporation. The end of these regular adjustments seems to coincide with the implementation of California's Proposition 218. Proposition 218 was a proposition in the State of California on the November 5, 1996 ballot. Prop 218 significantly changed local government finance. Prop 218 amended the California Constitution (Articles XIIIC and XIIID) which, as it relates to assessments, requires the local government to have a vote of the affected property owners for any proposed new or increased assessment before it could be levied. The Proposition was passed by California voters on November 5, 1996, and the assessments portion placed in effect on July 1, 1997.

Date	Subject	Action
2/9/1994	Report To PWAB regarding Proposed Water Rate Structure	Forwarded to Council
5/25/1995	Water Rate Increase	Council Adopted Resolution 57-95
10/28/1996	Report on Rates and Future implications	Discussion and no action
11/5/1996	Proposition 218 approved by the voters	N/A
12/8/1997	Proposed rate adjustment for Licensed Health Care Facilities, eliminating reduced fee	Council Adopted Resolution 86-97
6/22/1998	Rate Adjustment for Sewer Rates	Council Adopted Resolution 64-98
6/23/1998	Memo to Council RE: Statewide Wastewater Rate Survey	No Action
10/14/2002	Water Management Plan Status Report	Accept Report/ No Rate implications
8/28/2006	Establishment of Interim Wastewater Rate Increase	Council Adopted Resolution 39-06
11/13/2007	Establishment of new Wastewater Rates including an escalator	Council Adopted Resolution 55-07
6/9/2008	Discussion of Water and Sewer Rates and the Calculations Used	No Action Taken

3//2013	Discussion regarding Need for Water and Sewer Rate Increase	Continued with Council Direction
9/10/2013	Discussion regarding RFP Water Rate Study	Continued with Council Direction

B. Rate Review Policy

As stated in the previous section, in the past, i.e. prior to mid-late 1990's, the City would regularly review and make adjustments to water and sewer rates. These adjustments were typically fairly modest adjustments and were intended to keep pace with inflation. When proposition 218 was passed and with subsequent court decisions regarding utility rates it appears that due to the difficulty in adjusting rates, the City stopped reviewing water and sewer rates on an annual or semiannual basis. Instead, at least with sewer rates, the City made large infrequent adjustments in the rates. With water rates, due to the retirement of the debt on the Desal Plant in the early 2000's, there was no need to make any adjustments to rates until the Finance Department was notified in Fiscal Year 09/10 that the City was no longer meeting the debt coverage ratio for the State Water debt service.

Other Communities review their water and sewer rates on a regular basis. The City of Pismo Beach looks at their water and sewer rates based upon their five year planning period for capital projects. While Contra Costa Water District reviews their rates on an annual basis to keep their revenue adjustments at less than the rate of inflation. And a little further north, Tacoma Water's policy includes regular reviews being performed to determine the adequacy of rates, and a full revenue requirements study being performed every two years.

Staff would recommend that the City of Morro Bay establish a revenue (rate) review policy that ensures that the City receives enough revenue to provide a high level of service to its customers and sustain the conveyance and treatment infrastructure. It is staffs opinion that this period should not exceed a comprehensive review and potential adjustment every five years with a check-in during the annual budget review.

C. Rate Comparison

Staff has researched the water and sewer rate structures for the other communities and during that research discovered that both Atascadero Mutual Water Company and Templeton Community Services District have prepared similar analyses. The results of these comparison studies are summarized in the following tables:

Typical Residential Monthly Sewer Rates

(August 2013)

City of Pismo Beach(1)	$82.86
Cambria CSD	$68.91
City of San Luis Obispo	$50.33
Nipomo CSD	$44.16
City of Morro Bay	**$43.42**
City of Paso Robles	$37.80
Templeton CSD	$31.21
Avila CSD	$28.70
City of Arroyo Grande	$27.60

Heritage Ranch CSD	$26.09
City of Atascadero	$20.16
Oceano CSD	$18.79

(1) Pismo Beach Rate as of October 1, 2013

Typical Residential Monthly Water Rates
800CF/Month
(July 1, 2013)

City of San Luis Obispo	$60.35
City of Arroyo Grande	$53.04
City of Grover Beach	$49.08
City of Morro Bay	**$44.53**
Heritage Ranch CSD	$42.81
Cambria CSD	$35.92
Atascadero Mutual	$35.15
City of Pismo Beach	$35.09
Nipomo CSD	$32.26
Templeton CSD	$31.30
Santa Margarita CSA	$29.63
City of Paso Robles	$25.60

While it is interesting to look at the typical water and sewer rates in other communities, each community has a different profile for the source and costs of their water, and the methods of wastewater treatment. The basis for water and sewer rates is to recover all the costs associated with each utility and to equitability distribute the costs across the customer classes. This will be different for each community.

D. How Water and Sewer Rates Tie Together?

In the City of Morro Bay both the Water and Sewer fees are based upon the water that flows through the water meter at the end users location. The sewer rate has been adjusted to account for water that is used outside of the residence or business for irrigation and other outside uses. Additionally, there are water meters in the community that only are connected to irrigation systems and therefor do not have a sewer charge component.

The timing for the study and adjustment of the rates do not need to be performed at the same time. Although much of the same data is used in a rate study for both water and sewer and there are economies of scale to study both at the same time. That is the primary reason for staff bringing both the water and sewer rate studies to City Council simultaneously. Additionally, with the sewer rate, we know that there is an expensive project looming on the horizon for the citizens of Morro Bay. In order to construct such a large project, debt will be required. If that debt can be reduced through the development of a reserve fund, the overall cost of the project is reduced.

E. Historical Expenditures for the Water and Sewer Funds

Both the Water and Sewer funds are enterprise funds and therefore must be self-sustaining, i.e. all operations, maintenance and capital projects be funded by rates and other sources of funding that enters that fund. As is indicated in the budget summary tables below, both the

water and sewer funds currently have adequate reserves, but the operating expenses exceed the revenue due to increases in operating costs and large maintenance and repair projects that are needed to insure a safe and adequate water supply along with a sewer collection and treatment systems that protects the environment and the public health.

Summary of Water Fund Budget FY 2008 - 2013

	FY 08/09	FY 09/10	FY 10/11	FY 11/12	FY 12/13	FY 13/14(1)
Total Revenue	3,721,886	3,564,020	3,432,694	3,427,046	3,462,500	3,465,000
Change in Revenue		-4.43%	-3.83%	-0.16%	1.02%	0.07%
Operating Expenses including cost allocation	3,804,498	3,817,457	2,824,713	4,479,568	4,103,034	4,004,003
Change in Expenses		0.34%	-35.14%	36.94%	-9.18%	-2.47%
Capital Projects	1,288,628	278,151	-	750,000	-	1,850,000
Water Reserve Balance	5,166,472	4,984,596	4,842,676	4,350,747	3,436,851	1,346,096

Summary of Sewer Fund Budget FY 2008 - 2013

	FY 08/09	FY 09/10	FY 10/11	FY 11/12	FY 12/13	FY 13/14(1)
Total Revenue	3,132,491	3,520,103	3,764,312	4,854,930	3,536,000	3,719,000
Change in Revenue		11.01%	6.49%	22.46%	-37.30%	4.92%
Operating Expenses including cost allocation	2,484,018	2,831,174	2,988,676	2,877,309	2,800,176	4,314,813
Change in Expenses		12.26%	5.27%	-3.87%	-2.75%	35.10%
Capital Projects	29,799	156,707	-	1,185,095	-	1,110,000
Water Reserve Balance	2,658,118	2,978,205	2,997,320	3,885,574	5,665,231	5,044,584

(1) Budget Projections

Need for a Rate Study

As stated in previous staff reports, in order for the City to make any adjustments to the water and sewer rates equitably, the City should perform the following tasks:

- Evaluate the revenue, operation and maintenance expense, and capital needs of the Water and Wastewater Funds and ensure that revenue is sufficient to meet long-term obligations.
- Develop five-year financial plans for the Water and Wastewater Funds that stabilizes rate adjustments to avoid rate spikes while meeting financial planning criteria for each fund.
- Create schedules of water and wastewater rates and charges that are fair and equitable, that provide predictable sources of revenue developed in the financial plans, and that meet Proposition 218 requirements for rates and charges.

The City has a need to determine the cost of services and review its rates for both water and wastewater. These studies typically include projection of revenue and expense, identification of capital improvements, proposed financing of the improvements, development of a pro forma statement showing all financial obligations and debt service coverage, allocation of costs, and design of rates. The water rate studies should follow methodologies of the American Water Works Association while wastewater rate studies follow methods of the Water Environment Federation. It is anticipated that to complete the studies and move forward with a Proposition 218 vote will take approximately one year.

While existing City staff does have the technical expertise to perform a rate study, we lack sufficient human resources. The City does not have the available resources to perform the rate study, coordinate the public outreach effort and coordinate the required proposition 218 election for setting rates. Therefore, staff recommends the issuance of an RFP to select the most qualified firm for the cost of services and rate studies.

CONCLUSION

Based on the projected needs for the maintenance of our water system, the relocation and construction of the water reclamation facility as well as continued maintenance of our current wastewater treatment plant and to increase the debt coverage ratio to the minimum required amounts, the request of Council is to authorize staff to prepare and issue an RFP and award for the analysis of Water and Sewer rates for potential adjustments in accordance with the City's recently adopted Consultant Hiring Policy.

ATTACHMENTS

1. Minutes from September 10, 2013 City Council Meeting
2. Staff Report D-4 from September 10, 2013 City Council Meeting
3. Minutes, Resolutions and Staff Reports relating to water and sewer rates 1994-2008
4. Water Rate Detail from other SLO County agencies
5. Water and Sewer Budget Sheets

keep up the City's escalators with the owner. Mr. Schultz stated that that was a topic for Closed Session.

MOTION: Councilmember Nancy Johnson moved approval of Item D-3, directing staff to negotiate a sublease agreement for the sublease of 307 Morro Bay Blvd with Grandmas Place. The motion was seconded by Councilmember Leage and carried unanimously, 5-0.

D-4 AUTHORIZATION TO ISSUE A REQUEST FOR PROPOSAL (RFP) FOR A RATE STUDY FOR WATER & SEWER RATES; (PUBLIC SERVICES)

Public Services Director Rob Livick presented the staff report.

The public comment period for Item D-4 was opened.

Barbara Doerr posed some questions to Council regarding the funding of the WRF. Can the City use TOT or other tax measures to help pay for the WRF in an effort to help subsidize everybody equally?

The public comment period for Item D-4 was closed.

Mayor Irons stated that this staff report came to Council back in March of this year. Those minutes stated that this item was requested to be brought back and include a history of why we would go 20 years without adjusting water rates as well as what a rate policy would look like. This report doesn't have any of that data in it which troubles him. We need to come up with policy where we are proactively reviewing things. Before we go to an RFP, those questions need to be answered.

Councilmember Christine Johnson looked at the March 26th minutes as well and feels we need to dig in and lay out for the community as to why we haven't raised water rates in the last 20 years. She would love to see some historical analysis, doesn't have to be very detailed, maybe times and dates of when things were brought forward and what the decisions were. It would be helpful to her when she makes big decisions on rates. She would like to know the thought processes that previous Council's went through and how they struggled with it.

City Attorney Rob Schultz stated that 20 years ago when the City raised its rates, we had to fund State water and subsequently the desalination plant. It was only until approximately 5 years ago that the City found itself "behind the curve" financially; we hadn't been behind prior to that. It is his recollection that water rate discussions have come forward 2 or 3 times but there was never political support and so was never moved forward.

Councilmember Smukler agreed that the previous Council did discuss this issue but never came to any agreement. He feels it is very important in moving forward to present the community the justification of why we need this as well as provide the implications of what happens if this isn't done. He too feels we need to provide the history that has brought us here, to take a little more time to work through this, and then make the decision as to what the rate study needs to accomplish.

Mayor Irons read an excerpt from the March 26th minutes that stated "there should be more information, historical information, rate comparisons with other cities, as well a more detailed breakdown of our costs and expenses, and how our water and sewer rates tie together". The community needs to be educated as to why our water rates are where they are and why it took 20 years for us to address it. We need to look at a policy to address this issue and shouldn't be so quick to go out to RFP with this.

Councilmember Smukler agrees feels there needs to be more work done internally to present the justification information discussed at the previous meeting. He also feels it's important to present historical information regarding expenditures in both the water and sewer funds and how they've been managed so far.

Mayor Irons also feels that the RFP can be worked on simultaneously so that it is ready to be sent out as soon as the historical information is presented at a future meeting.

Councilmember Christine Johnson is interested in what the historical thought process was, it isn't important who said what or when but instead, what was said.

Councilmember Smukler would also like to know where our rates stand in comparison to other cities in the County.

This item was continued and is to be brought back with the information requested.

D-5 DISCUSSION ON POTENTIAL REVENUE BALLOT MEASURES FOR THE JUNE 2014 ELECTION INCLUDING A SALES TAX, PUBLIC UTILITIES USER TAX, TRANSIENT OCCUPANCY TAX, AND 911 TAX; (CITY ATTORNEY)

City Attorney Rob Schultz presented the staff report.

Councilmember Leage is very much against increasing the TOT tax; he would rather see us look at bringing businesses into town to increase business revenues. If he had to select a revenue measure to support, it would be the sales tax.

The public comment period for Item D-5 was opened.

Barbara Doerr stated that any new tax should only go to the new WRF as it is the biggest project. She hoped that residents would be treated as intelligent voters and wants to see everything put out there at once. The City has had success with sales tax because they were up front with what they were asking for. She said she wouldn't support a Utility User Tax as it would have to be addressed every year. She would support a TOT tax increase. She hoped they wouldn't look at an assessment tax.

The public comment period for Item D-5 was closed.

Mayor Irons stated that this item came forward from the results of a Councilmember request as well as results of the Street Summit. For him, this is driven by the community and the

AGENDA NO: D-4

MEETING DATE: September 10, 2013

Staff Report

TO: **Honorable Mayor and City Council** **DATE: September 3, 2013**

FROM: **Rob Livick, PE/PLS - Public Services Director/City Engineer**

SUBJECT: **Authorization to Issue a Request for Proposal (RFP) for a Rate Study for Water & Sewer Rates**

RECOMMENDATION

Authorize staff to prepare and issue an RFP and award a contract for the analysis of Water and Sewer rates for potential adjustments, in accordance with the City's Consultant Hiring Policy.

FISCAL IMPACT

Both the water and sewer funds have upcoming required future expenses for which the current rate structures will not provide adequate funding. Additionally, the current rate structures of both revenue streams do not produce adequate funds to meet debt coverage ratios. It is anticipated that the total cost to perform a cost of the services study and rate analysis for both water and wastewater rates will be $75,000; those costs would be divided equally between the two funds. The source of the funds would be the Water and Sewer accumulation accounts.

BACKGROUND/ DISCUSSION

The community's water and wastewater rates structures are both related to water consumption: water based upon direct meter readings and wastewater upon estimates of what portion of water delivered is "returned" to the sewer system. Wastewater rates also incorporate the constituents that the various types of customers add to the wastewater stream, such as detergents from laundry businesses and/or food products from restaurants. These higher strength wastewater streams require more treatment than residential strength wastewater and thus have higher rates for treatment.

Water Rates

In advance of setting the water rates in 1994, the City Council considered a number of different types of rate structures, including a flat rate (each billing unit costs the same), a multi-tiered system (flat rate for fixed costs plus variable rate for water delivered) and an inverted block rate (each successive billing unit costs more than the previous unit). The water rate philosophy adopted by the City Council was a version of the inverted block rate. This system's primary characteristic is that it provides for incentives for water

Prepared by: __RL__ Dept. Review: RL__

City Manager Review:_____

City Attorney's Review:_____

conservation but it also provides that higher volume customers effectively pay a significantly higher unit cost for water for which the City pays a flat rate (i.e., State Water at $1500 +/- per acre foot).

One of the areas wherein the inverted block rate was found lacking was that the originally calculated rates for low volume users, in this instance in the 0 – 3 billing unit per month category, did not recover the City's fixed cost for reading of meters, billing costs and maintenance of mains, service connections and meters. This fixed cost was estimated at the time to be about $30 per month per customer.

Another area of consideration related to this group of users, was the absentee owners of vacation homes. Under the previous rate structure, these absentee owners would use no water for the months they did not occupy their vacation homes and not therefore pay a monthly bill. When they occupied the home they would pay a nominal amount for the small amount of water used, then not pay a bill for the remainder of the year. Their meters would still be read, zero balance bills mailed, and maintenance would still be performed but no revenue would be received.

To answer these concerns, the minimum monthly billing amount for 0 – 3 billing units per month based upon the calculated 3 billing unit cost of $16.43 per month was implemented. This amount is less than the monthly fixed costs referenced above with the other customers subsidizing the remaining amount. Qualified customers able to provide low income documentation were afforded the opportunity to participate in a rate reduction program. There are currently approximately 50 customers on this program and due to inconsistencies with the requirements of proposition 218, the program will terminate in January of 2014.

The water rate structure has been in place unchanged since that time, with the exception of the rate reduction program which we can no longer offer due to Prop 218. During that same time, operational expenses have increased more than 200%. Additionally, there may be different strategies in a rate structure to encourage water conservation in accordance with the City's adopted 2010 Urban Water Management Plan and State Requirements. For the past four fiscal years, the City has not met its obligation to the State Water project for the debt coverage ratio. The City is required to earn/charge monies through rate payers so that the amount taken in is 1.25 times more than the amount required for operational expenses. Currently, this debt coverage ratio is only at 0.74 times the amount needed. Additionally, there are capital project needs within the system that are necessary to maintain a safe and dependable water supply, including the following major Capital projects: Desalinization Plant upgrades and replacement of the Nutmeg Water Tank. In addition to these major capital projects there are a host of smaller "maintenance" type projects whose costs are not insignificant. These projects include pump replacements, valve replacements and water meter replacements among other maintenance projects.

Wastewater Rates

The wastewater rate schedule underwent a similar consideration when it was originally adopted in the early 1980's based upon both community philosophical desires and Wastewater Treatment plant (WWTP) upgrade grant requirements. The adopted rate schedule is a multi-tiered system for residential customers with a flat rate component from 0 – 10 water billing units, which recovered fixed costs for both the Collection System and the WWTP and a variable component based upon usage above that amount and the constituents of the residential wastewater stream.

One matter for consideration in this issue is that while water use is directly metered and is therefore readily determined, discharges into the sewer system from customers are not directly metered and it can only be estimated how much wastewater is discharged from any given customer in any given billing period.

Water passing through the water meter is often used for irrigation and other purposes that do not result in a sewer discharge, thus making it impractical to clearly document the amount of discharge. The wastewater rate structure tries to accommodate this difference by providing an allowance for up to 10 billing units of water used. This allowance promises to alleviate arguments from customers as to whether their water use of, say, 7 billing units resulted in the discharge of 1, 5, or 7 units of wastewater.

With only two exceptions, since its original adoption, wastewater rate increases were implemented based upon uniform across-the-board percentage increases. One increase was implemented based upon the minimum monthly billing amount.

The second and most recent increase occurred in October 2007, where the City Council adopted a schedule of sewer rate increases to fund the construction of the wastewater treatment plant at the current site. This rate increase looked more closely at the residential and commercial categories and initially provided a 50% commercial and residential increase and a subsequent 7.25% annual commercial and 5% annual residential increase. This current rate schedule for increases ends in one year as Proposition 218 requires a new vote every five years for succeeding rate increases.

Due to events that have occurred since that adopted increase, including the denial of the Coastal Development Permit for the wastewater treatment plant at the current location and the community's desire to construct a new Water Reclamation Facility away from the coast, the assumptions used in the 2007 rate increase are no longer adequate. In late 2010/early 2011, finance staff worked with RBC Capital to verify debt service coverage in anticipation of entering into a State Revolving Fund loan, and discovered our revenues in excess of our expenditures were insufficient to meet debt coverage ratios.

In November 2012, the Public Services Director prepared a memo to City Council, advising them of the potential rate concerns with relocating the new Water Reclamation

Facility (WRF) at one of the alternative sites. The estimated rate adjustment of relocating to a new site is preliminarily estimated at 38-percent above the rate structure currently in place that was needed to build at the existing site. This proposed rate increase is not only needed to relocate and construct the new WRF, but also to pay for the Major Maintenance and Repairs to maintain operations at the existing plant, as well as meeting debt coverage ratios for financing a future WRF project.

In order for the City to make any adjustments to the water and sewer rates equitably, the City should perform the following tasks:

- Evaluate the revenue, operation and maintenance expense, and capital needs of the Water and Wastewater Funds and ensure that revenue is sufficient to meet long-term obligations.
- Develop five-year financial plans for the Water and Wastewater Funds that stabilizes rate adjustments to avoid rate spikes while meeting financial planning criteria for each fund.
- Create schedules of water and wastewater rates and charges that are fair and equitable, that provide predictable sources of revenue developed in the financial plans, and that meet Proposition 218 requirements for rates and charges.

The City has a need to determine the cost of services and review its rates for both water and wastewater. These studies typically include projection of revenue and expense, identification of capital improvements, proposed financing of the improvements, development of a pro forma statement showing all financial obligations and debt service coverage, allocation of costs, and design of rates. The water rate studies should follow methodologies of the American Water Works Association while wastewater rate studies follow methods of the Water Environment Federation. It is anticipated that to complete the studies and move forward with a Proposition 218 vote will take approximately one year.

Currently the City does not have the available resources to perform the rate study, coordinate the public outreach effort and coordinate the required proposition 218 election for setting rates. Therefore, staff recommends the issuance of an RFP to select the most qualified firm for the cost of services and rate studies.

CONCLUSION

Based on the projected needs for the maintenance of our water system, the relocation and construction of the water reclamation facility as well as continued maintenance of our current wastewater treatment plant and to increase the debt coverage ratio to the minimum required amounts, the request of Council is to authorize staff to prepare and issue an RFP and award for the analysis of Water and Sewer rates for potential adjustments in accordance with the City's recently adopted Consultant Hiring Policy.

MINUTES - MORRO BAY CITY COUNCIL
REGULAR MEETING – JUNE 9, 2008

B-3 DISCUSSION ON WATER AND SEWER RATES AND THE CALCULATIONS USED; (PUBLIC SERVICES)

Capital Projects Manager Bill Boucher stated this item has been placed on the agenda by Council request and intends to provide background and discussion on the genesis and calculations of the water and wastewater rate structures. The community's water rate structure was adopted in a two-step process in 1994 and 1995 and there have been no changes to the structure since that time. The most recent wastewater rate structure was adopted in November 2007 and will become effective on July 1, 2008. Any proposed changes to either rate structure must be done both with consideration of the public process required by Proposition 218 and adjusting portions of the rate structure upward if other portions are proposed to be lowered in order to generate the funding needed to pursue adopted programs and policies. The community's water and wastewater rates structures are both related to water consumption: water based upon direct meter readings and wastewater upon estimates of what portion of water delivered is "returned" to the sewer system. Wastewater rates also incorporate the constituents that the various types of customers add to the wastewater stream, such as detergents from laundry businesses and food products from restaurants. Mr. Boucher recommended the City Council receive this report for information, and direct staff accordingly.

Mayor Peters opened the hearing for public comment; there were no comments, and Mayor Peters closed the public comment hearing.

This was an informational item, and no action was taken.

Mayor Peters called for a break at 8:50 p.m.; the meeting resumed at 9:00 p.m.

B-4 DISCUSSION ON PLACING AN INITIATIVE ON THE NOVEMBER 2008 GENERAL ELECTION BALLOT IN REGARD TO A UTILITY USER TAX AND/OR A TRANSIENT OCCUPANCY TAX AND/OR AMENDING MEASURE D; (CITY ATTORNEY)

City Attorney Robert Schultz stated at previous City Council meetings, Council has requested information on placing a voter measure on the November 2008 General Election ballot in regard to increasing transient occupancy tax, establishing a Utility User Tax, and amending or repealing Measure D. Mr. Schultz requested Council direction regarding whether to proceed with preparing any measure, as the full text of the measure and the exact form of the question must be submitted to the San Luis Obispo County Clerk by July 23, 2008.

Mayor Peters opened the hearing for public comment.

AGENDA NO: B-3

Meeting Date: June 9, 2008 Action:_____

Staff Report

TO: **Honorable Mayor and City Council** **DATE: June 5, 2008**

FROM: **William T. Boucher, Capital Projects Manager**

SUBJECT: **Discussion on Water and Sewer Rates and the Calculations Used**

RECOMMENDATION: **Staff recommends the City Council receive and file this Report.**

FISCAL IMPACT: **None identified at this time.**

SUMMARY: This item has been placed on the agenda by Council request and intends to provide background and discussion on the genesis and calculations of the water and wastewater rate structures. The community's water rate structure was adopted in a two-step process in 1994 and 1995 and there have been no changes to the structure since that time. The most recent wastewater rate structure was adopted in November 2007 and will become effective on July 1, 2008.

Any proposed changes to either rate structure must be done both with consideration of the public process required by Proposition 218 and adjusting portions of the rate structure upward if other portions are proposed to be lowered in order to generate the funding needed to pursue adopted programs and policies.

BACKGROUND/ DISCUSSION: The community's water and wastewater rates structures are both related to water consumption: water based upon direct meter readings and wastewater upon estimates of what portion of water delivered is "returned" to the sewer system. Wastewater rates also incorporate the constituents that the various types of customers add to the wastewater stream, such as detergents from laundry businesses and food products from restaurants.

Water Rates: In advance of setting the water rates in 1994, the City Council considered a number of different types of rate structures, including a flat rate (each billing unit costs the same), a multi-tiered system (flat rate for fixed costs plus variable rate for water delivered)

Prepared By: _____ Dept Review: _____

City Manager Review: _____

City Attorney Review: _____

and an inverted block rate (each successive billing unit costs more than the previous unit). The water rate philosophy adopted by the City Council was a version of the inverted block rate. This system's primary characteristic is that it provides for incentives for water conservation but it also provides that higher volume customers effectively pay a significantly higher unit cost for water for which the City pays a flat rate (i.e., State Water at $1500 +/- per acre foot).

One of the areas wherein the inverted block rate was found lacking was that the originally calculated rates for low volume users, in this instance in the 0 – 3 billing unit per month category, did not recover the City's fixed cost for reading of meters, billing costs and maintenance of mains, service connections and meters. This fixed cost was estimated at the time to be about $30 per month per customer.

Another area of consideration related to this group of users were absentee owners of vacation homes. Under the previous rate structure, these absentee owners would use no water for the months they did not occupy their vacation homes and not therefore pay a monthly bill. When they occupied the home they would pay a nominal amount for the small amount of water used, then not pay a bill for the remainder of the year. Their meters would still be read, zero balance bills mailed, and maintenance would still be performed but no revenue would be received.

To answer these concerns, the City Council adopted the current minimum monthly billing amount for 0 – 3 billing units per months based upon the calculated 3 billing unit cost of $16.48 per month. This amount is less than the monthly fixed costs referenced above with the other customers subsidizing the remaining amount. Low volume customers having financial difficulty were afforded the opportunity to participate in a rate reduction program.

The water rate structure has been in place unchanged since that time and no rate increases are foreseen into the future.

Wastewater Rates: The wastewater rate schedule underwent a similar consideration when it was originally adopted in the early 1980's based upon both community philosophical desires and WWTP grant requirements. The adopted rate schedule is a multi-tiered system for residential customers with a flat rate component from 0 – 10 water billing units, which recovered fixed costs for both the Collection System and the WWTP and a variable component based upon usage above that amount and the constituents of the residential wastewater stream.

One matter for consideration in this issue is that while water use is directly metered and is therefore readily determined, discharges into the sewer system from customers are not directly metered and it can only be estimated how much wastewater is discharged from any given customer in any given billing period.

Water passing through the water meter is often used for irrigation and other purposes that does not result in a sewer discharge, making it impractical to clearly document the amount of discharge. The wastewater rate structure tries to accommodate this difference by providing an allowance for up to 10 billing units of water used. This allowance promises to alleviate arguments from customers as to whether their water use of, say, 7 billing units resulted in the discharge of 1, 5, or 7 units of wastewater.

Since its original adoption, the wastewater rates increases were implemented with two exceptions that were based upon uniform across-the-board percentage increases. One increase was implemented based upon the minimum monthly billing amount. The second and most recent increase, which is going into effect for water used in the month of July, looked more closely at the residential and commercial categories and provided a 50% commercial and residential increase and subsequent 7.25% annual commercial increase and 5% residential increases.

CONCLUSION: This report was prepared at Council request to provide information on how the existing water and wastewater rate structures were derived and implemented. No action is requested from the Council and Staff recommends the report be received and filed.

wtb:s:\city council staff reports\boucher\water and sewer rates060908

RESOLUTION NO. 55-07

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MORRO BAY ESTABLISHING USER RATES FOR RESIDENTIAL WASTEWATER SERVICES

THE CITY COUNCIL
City of Morro Bay, California

WHEREAS, in accordance with California Government Code Section 54344, the City Council has the authority to establish fees and charges for the City's Wastewater System; and

WHEREAS, the community of Morro Bay seeks to upgrade the wastewater treatment plant to tertiary treatment standards per the recommendations in the Wastewater Treatment Plant Facility Master Plan and to provide for a properly functioning wastewater collection system, complying with the State Water Resources Control Board requirements and the City of Morro Bay Sewer Collection System Master Plan; and

WHEREAS, after review of relevant financial data, it has been determined that existing Wastewater System rates and charges presently generate insufficient revenue for prudent operation of the System for the adequate health, safety, and welfare of the community; and

WHEREAS, the financial analysis for the wastewater treatment plant upgrade has provided a plan for funding of the treatment plant operations and maintenance activities into the future; and

WHEREAS, the City Council finds that an adjustment in rates charged for these services is necessary now to provide adequate funds to commence required activities on the wastewater treatment plant upgrade and the collection system for systems operations, maintenance and replacement; and

WHEREAS, a notice of the public hearing of the proposed changes to the wastewater rates was mailed to each rate payer not less than forty-five days prior to the public hearing, in compliance with Section 6 of Article XIII-D of the Constitution of the State of California; and

WHEREAS, a duly noticed public hearing of these proposed rate increases was held before the City Council on November 13, 2007; and

WHEREAS, at the hearing on November 13, 2007, Jim Nance, Judith Brown, Marcia Turner, John Barta, Nancy Bast, Michael Durrick, Don Rauch and Susan Mullen were present and spoke in opposition to the proposal; and David Nelson and Lanny McKay were present and spoke in support of the proposal; and

WHEREAS, on November 13, 2007, the City Clerk advised the Council that 267 written protests of the proposal were received prior to the hearing; and

WHEREAS, on November 13, 2007, the City Council received two written rate increase protests that were submitted at the time of the public hearing; and

WHEREAS, after hearing public testimony and staff's report and recommendations, the City Council has determined that certain rates and charges for the City's Wastewater System should be revised and amended.

NOW, THEREFORE, the City Council of the City of Morro Bay hereby resolves as follows:

SECTION 1: FINDINGS. After hearing testimony, considering the evidence offered, and duly deliberating the matters presented, the City Council of the City of Morro Bay finds and determines that:

A. Pursuant to the authority of the Revenue Bond Law of 1941 (Government Code Sections 54300-54700) and of Morro Bay Municipal Code Chapter 13, the City of Morro Bay operates and maintains systems and facilities for the collection, treatment, and disposal of sewage and wastewater; and

B. The City Council is empowered to prescribe, revise, and collect charges for the services and facilities furnished by the City's Wastewater System (the "System"); and

C. The proceedings related to the proposed increases in wastewater rates and charges have been duly noticed in compliance with the Constitution of the State of California, Government Code Section 54354.5, and other applicable laws; and

D. The rates and charges set forth below are not discriminatory; and

E. The rates and charges set forth below are not excessive, inasmuch as revenues from said rates and charges will not exceed the costs of providing wastewater services; and

F. The revenue generated by the rates and charges set forth below will be sufficient to pay the current expenses of maintenance and operation of the System, to honor other City obligations dependent upon System revenues, and to otherwise allow the City to comply with Government Code Section 54515 and other applicable laws and regulations.

SECTION 2: WASTEWATER SERVICE RATES AND CHARGES. Based upon these findings, the City Council hereby determines that it is in the interests of the general welfare of the community to adjust rates for Residential and Non-Residential categories pursuant to the following rate schedule:

Single Family Residential	$34.02 flat for 10 ccf + $3.04 each ccf over 10
Single Family Condos	$34.02 flat for 3 ccf + $3.04 each ccf over 3
Multiple Family Residential	$34.02 flat for 10 ccf + $3.04 each ccf over 10
Mobile Home Parks	$3.04 per ccf ($34.02 minimum)
Commercial/Domestic Strength	$3.83 per ccf ($34.02 minimum)
Commercial Laundry	$3.83 per ccf ($34.02 minimum)
Condo – Common Area (with sewer)	$3.83 per ccf ($34.02 minimum)
Laundromat	$3.04 per ccf ($34.02 minimum)
Car Wash	$3.04 per ccf ($34.02 minimum)
Restaurants	$8.79 per ccf ($34.02 minimum)
Bakeries	$8.79 per ccf ($34.02 minimum)
Retirement Home/Hospital	$6.87 per ccf ($34.02 minimum)
Motels	$5.28 per ccf ($34.02 minimum)
Mortuaries	$5.73 per ccf ($34.02 minimum)
Hotels with Dining	$6.87 per ccf ($34.02 minimum)
Seafood Processors	$8.79 per ccf ($34.02 minimum)
Water Softeners	$3.04 per ccf ($34.02 minimum)
Schools	$3.04 per ccf ($34.02 minimum)
Other Public Facilities	$3.04 per ccf ($34.02 minimum)
City Facilities on Sewer	$3.04 per ccf ($34.02 minimum)
Power Plant	$391.01 flat rate – not read

SECTION 3: EFFECTIVE DATE. This Resolution is effective upon its adoption. However, the Rate Schedule set forth above in Section 2 shall begin with wastewater billed for the month of July 2008. Except as amended herein, all rates or charges related to the System as contained in Resolutions 39-06 and 59-06 shall remain in full force and effect.

SECTION 4: ANNUAL INCREASES: To reduce the negative impacts of inflation and other cost increases beyond the community's control, a 5% increase in residential rates and a 7.25% increase in non-residential rates shall be effective July 1st of each subsequent year.

SECTION 5: COLLECTION. The City Council hereby directs that the rates and charges established by this Resolution shall be billed and collected together with charges for other utility services rendered by the City of Morro Bay.

SECTION 6: ENFORCEMENT. In the enforcement of the collection of the rates and charges established herein, the City of Morro Bay may use any available remedy at law or in equity, provided, however, that said rates and charges shall not be collected by means of the San Luis Obispo County Assessor's roll of real property taxes, nor shall any delinquent rates or charges be enforced by means of a lien on real property.

PASSED AND ADOPTED by the Morro Bay City Council at a regular meeting thereof held on the 13th day of November 2007 by the following vote:

AYES: Grantham, Peirce, Peters
NOES: DeMeritt, Winholtz
ABSENT: None
ABSTAIN: None

JANICE PETERS, Mayor

ATTEST:

BRIDGETT BAUER, City Clerk

RESOLUTION NO. 39-06

RESOLUTION OF THE CITY COUNCIL OF MORRO BAY ESTABLISHING USER RATES FOR WASTEWATER SERVICES

THE CITY COUNCIL
City of Morro Bay, California

WHEREAS, the community of Morro Bay seeks to provide for a properly functioning wastewater collection system, complying with the State Water Resources Control Board requirements and the City of Morro Bay Collection System Master Plan; and

WHEREAS, an upcoming financial analysis for the wastewater treatment plant upgrade will provide a plan for funding of collection and treatment capital, operations and maintenance activities into the future; and

WHEREAS, the City Council finds that an adjustment in rates charged for these services is necessary now to provide adequate funds to commence required activities in the collection system for system operations, maintenance and replacement.

NOW, THEREFORE, BE IT RESOLVED by the City Council, City of Morro Bay that it is in the interests of the general welfare of the community to adjust rates with an increase of 20%; and

BE IT FURTHER RESOLVED the following monthly user rate schedule for services is adopted, effective November 2006; and

BE IT FURTHER RESOLVED, to reduce the negative impacts of inflation and other cost increases beyond the community's control, a uniform 5% increase in rates shall be effective January 1st of each subsequent year.

MONTHLY - WASTEWATER RATES

Multiple Family Residential	$20.10 flat for 10 ccf + $1.93 each ccf over 10
Mobile Home Parks	$1.93 per ccf ($20.10 minimum)
Commercial/Domestic Strength	$2.43 per ccf ($20.10 minimum)
Commercial Laundry	$2.43 per ccf ($20.10 minimum)
Condo - Common Area (with sewer)	$2.43 per ccf ($20.10 minimum)
Laundromat	$1.93 per ccf ($20.10 minimum)
Car Wash	$1.93 per ccf ($20.10 minimum)
Restaurants	$5.58 per ccf ($20.10 minimum)
Bakeries	$5.58 per ccf ($20.10 minimum)
Retirement Home/Hospital	$4.36 per ccf ($20.10 minimum)
Motels	$3.35 per ccf ($20.10 minimum)
Mortuaries	$3.64 per ccf ($20.10 minimum)
Hotels with Dining Room	$4.36 per ccf ($20.10 minimum)
Seafood Processors	$5.58 per ccf ($20.10 minimum)
Water Softeners	$1.93 per ccf ($20.10 minimum)
Schools	$1.93 per ccf ($20.10 minimum)
Other Public Facilities	$1.93 per ccf ($20.10 minimum)
City Facilities/on Sewer	$1.93 per ccf ($20.10 minimum)
Power Plant	$248.26 Flat rate - not read

PASSED AND ADOPTED by the Morro Bay City Council at a regular meeting held thereof on the 28th day of August, 2006 by the following vote:

AYES: Baxey, DeMeritt, Peirce, Peters, Winholtz
NOES: None
ABSENT: None

JANICE PETERS, Mayor

ATTEST:

Bridgett Bauer

BRIDGETT BAUER, City Clerk

MINUTES - MORRO BAY CITY COUNCIL
REGULAR MEETING – AUGUST 28, 2006

B. PUBLIC HEARINGS, REPORTS & APPEARANCES

B-1 RESOLUTION NO. 39-06 ADOPTING AN INTERIM WASTEWATER RATE INCREASE; (PUBLIC SERVICES)

Capital Projects Manager Bill Boucher stated in order to reduce the risk of untreated wastewater spills into the community and environment now and into the future, the City needs to increase user fees to fund identified programs. With an upcoming financial analysis leading to more significant rate increases on the horizon for the construction and operation of the committed Wastewater Treatment Plant upgrade, the City plans to dovetail the remainder of the Collection system programs into this overall analysis rather than trying to prepare a comprehensive analysis and rate structure now and revise it in a matter of weeks. A 20% rate increase should generate an additional $300,000 in annual revenues, enabling the commencement of activities required by the State Waste Discharge Requirements and recommended tasks of the adopted Collection System Master Plan. Mr. Boucher recommended the City Council conduct a public hearing on this matter, and adopt Resolution No. 39-06 approving a 20% interim wastewater rate increase.

Mayor Peters opened the hearing for public comment.

Joey Racano expressed opposition to the interim wastewater rate increase because the City is not in compliance with the Clean Water Act and is operating without a waiver.

Marla Bruton stated there is grant money and bonds available through the regional full tertiary plan that could assist the City instead of increasing wastewater rates.

Sandra Brazil stated the City should be using the $5 million that has been earmarked through the Joint Powers Authority with Cayucos Sanitary District that was meant for this purpose.

Jim Nance stated the City should offer a rate reduction for low-income people, and charge the high-end users with an increase in fees.

Jeff Odell referred to a gray water program used during a drought in Morro Bay about 20 years ago, and asked if that could be instituted again.

Mayor Peters closed the public comment hearing.

Councilmember Winholtz stated she is not interested in increasing rates at this time, and would like to implement an across the board fee based on the previous increase approved by Council.

Councilmember Baxley stated the rates would need to be increased at some point in order to implement the Sewer Master Plan. He expressed concern with implementing this increase at the same time as placing the sales tax initiative on the November ballot.

Councilmember DeMeritt stated she does not support a retroactive fee increase. She said the citizens should be made aware that an increase is impending.

Councilmember Peirce stated a rate increase would be required because the Wastewater Treatment Plant is in need of upgrades.

Mayor Peters stated she supports an across the board rate increase based on Council's previous action but not retroactively. She said those who have not had to pay an increase should have their rates increased.

MOTION: Mayor Peters moved the City Council adopt Resolution No. 39-06 with the amendment to remove the top two designations and begin a 20% increase by September 1, 2006. The motion was seconded by Councilmember Winholtz and carried unanimously. (5-0)

MOTION: Mayor Peters moved the City Council direct staff to return with a resolution to include an increase for single-family residences and single-family residential condominium units to begin January 1, 2007 and to include a 5% increase on a quarterly basis. The motion was seconded by Councilmember Winholtz and carried with Councilmember DeMeritt and Councilmember Peirce voting no. (3-2)

C. UNFINISHED BUSINESS

C-1 AUTHORIZATION FOR WASTEWATER TREATMENT ALTERNATIVES FOR ADDED ALTERNATIVES IN THE CHORRO VALLEY; (PUBLIC SERVICES)

MOTION: Councilmember Peirce moved the City Council continue this item to the September 11, 2006 City Council meeting. The motion was seconded by Councilmember Winholtz and carried unanimously. (5-0)

Meeting Date: August 14, 2006

Action:

Staff Report

TO : HONORABLE MAYOR AND CITY COUNCIL **DATE :** AUGUST 4, 2006

FROM : WILLIAM T. BOUCHER

SUBJECT : CONSIDERATION OF INTERIM WASTEWATER RATE INCREASE

RECOMMENDATION : Staff recommends the City Council conduct a public hearing on this matter and, as result, adopt a 20% interim wastewater rate increase via the adoption of Resolution No. 39-06.

FISCAL IMPACT : A 20% rate increase should generate an additional $300,000 in annual revenues, enabling the commencement of activities required by the State Waste Discharge Requirements and recommended tasks of the adopted Collection System Master Plan.

The average residential customer currently pays $16.75 per month for wastewater and the proposed 20% interim increase will raise that cost to $20.10. The increase will serve to help fund needed new programs in the Collection system pending the results of the financial analysis for expenses related to the upcoming improvements to the Wastewater Treatment Plant and Collection system capital projects.

The Sewer Revenue Fund is gradually being eroded due to the increasing maintenance needs resulting from the age of the Collection System and the preventative maintenance and operations costs of the recently-adopted WDR's.

A rate increase at this time of year will not capture the peak summer month of July but the accompanying Resolution No. 39-06 is written so as to include usage starting the month of August.

SUMMARY : In order to reduce the risk of untreated wastewater spills into the community and environment now and into the future, we need to increase user fees to fund identified programs.

With an upcoming financial analysis leading to more significant rate increases on the horizon for the construction and operation of the committed WWTP upgrade, we plan to dovetail the remainder of the Collection system programs into this overall analysis rather than trying to prepare a comprehensive analysis and rate structure now and revise it in a matter of weeks.

The purpose of this report is to provide for discussion of near term revenue needs for the Collection system and a supporting Resolution for an interim 20% "across-the-board" rate increase.

DISCUSSION : The recently-adopted Collection System Master Plan Update and State Waste Discharge Requirements (WDR) both compel the initiation of programs for our sewer collection system, including preparation and implementation of a sanitary sewer management plan, a spill prevention plan, reduction in stormwater inflow and infiltration (I/I), capital improvement projects and a computerized system for monitoring and reporting. All these programs have as their underlying intents the commitment to providing a sewer collection system with sufficient hydraulic capacity in accord with adopted planning policies, to maintain the system adequately to reduce risk of spills and to demonstrate

City Manager Review:

the adequacy of these programs to the State regulators via computerized monitoring and reporting.

Maintaining the integrity and effectiveness of the current Collection System is far more cost/effective and conserving than designing the system and treatment plant for excessive flows.

The current wastewater rate schedule generates revenues in the total annual amount of about $1.5 million. Adopted operational expenditures for the Collection system and Wastewater Treatment Plant for Fiscal Year 2006/07, not including any capital projects or Master Plan or WDR programs, total more than $1.6 million.

Revenues from the existing rate structure are not quite adequate to meet the current financial obligations and will fall further short of those needed to fund the existing operations of the Collection system and WWTP plus the added requirements of the WDR and Master Plan. The WDR portion of these requirements alone is estimated to cost customers an average of an additional $20 per month. With more than 5,400 customers, this translates to about $1.3 million in supplementary revenue needed to meet these costs.

At the same time we are seeing these substantially increased costs for the Collection system, we are also committing to a community upgrade of the WWTP that is estimated have a construction cost of about $20 million. A loan repayment for this amount would cost about $1.1 million per year, plus increased operational expenses that would result as well.

One of the pre-construction requirements of the WWTP upgrade is to perform a financial analysis/rate study and to implement a financial program adequate to meet the demands of capital projects, operations and maintenance of the infrastructure. The current WWTP upgrade schedule has the consultant selection process for this analysis commencing August 1, 2006 with an estimated cost of $85,000 (including the cost share for the Cayucos Sanitary District).

With costs anticipated to continue to rise due to inflation and other causes into the indefinite future, we have included a 5% annual adjustment for sewer rates in the attached Resolution No. 39-06, pending the results of the upcoming financial analysis.

CONCLUSION: While the Collection System will need to participate in this analysis and rates will need to be raised as result, it is critical that we implement an interim rate increase now so that we can commence the new mandated activities before the reporting requirements start this November and then winter rains hit. There are many tasks that need to be completed before these programs can begin, including those included in consideration of reorganization options: preparation and approval of job descriptions and salary ranges, budgetary adjustments, employee recruitment, training and equipment acquisition. This rate increase will allow us to commence those activities.

wtb:c:\bill\collections\cc-rates081406

attach.

RESOLUTION NO. 39-06

MINUTES - MORRO BAY CITY COUNCIL
REGULAR MEETING - OCTOBER 14, 2002

B-2 CONSIDERATION OF WATER MANAGEMENT PLAN STATUS REPORT; (PUBLIC SERVICES)

Capital Projects Manager Bill Boucher stated the Water Management Plan (WMP), adopted in 1994 and placed into effect upon Coastal Commission certification in 1995, established a blue print for water resources now and into the future. As a requirement of the WMP, the City is to periodically re-assess the condition of the community's potable water resources and submit a report to the Executive Director of the Coastal Commission. A Water Management Plan Status Report endorsed by subcommittees formed by the Planning Commission and Public Works Advisory Board, has come to the conclusion that the existing WMP remains valid and successful continuation of the programs will allow for adequate sustainable water supplies for the community at General Plan build-out. Mr. Boucher along with the Planning Commissioners and Public Works Advisory Board Members recommend the City Council approve the Water Management Plan Status Report, and direct staff to forward it to the Coastal Commission.

Mayor Anderson opened the hearing for public comment.

Bill Woodson, Chairman of Public Works Advisory Board, addressed the effectiveness of the sub-committees who reviewed the Water Management Plan Status Report. He said there are many opportunities for the City to benefit from water reclamation.

Betty Winholtz asked at what point would the City stop purchasing State Water.

Don Boatman stated water reclamation is beneficial because it saves water and is a good resource.

John Barta stated the review of the Water Management Plan by the sub-committee was a very useful and productive process. He said for policy purposes the water reclamation program is valuable; however, for operational, cost and practicality purposes, water reclamation is more difficult to implement.

Mayor Anderson closed the public comment hearing.

MOTION: Councilmember Elliott moved the City Council approve the Water Management Plan Status Report, and direct staff to forward it to the Coastal Commission. The motion was seconded by Councilmember Peirce and carried unanimously. (5-0)

MINUTES - MORRO BAY CITY COUNCIL
REGULAR MEETING - JUNE 22, 1998

Mayor Novak opened the hearing for public comment; there were no comments and the public hearing was closed.

Council consensus was in support of this grant program application.

MOTION: Councilmember Peirce moved the City Council adopt Resolution No. 57-98 approving the application for grant funds for the Coastal Resources Grant Program under Section 35030/35031 of the Public Resources Code for the reconstruction of the City dock located at 1250 Embarcadero. The motion was seconded by Councilmember Elliott and carried unanimously. (5-0)

B-5 RESOLUTION NO. 64-98 ESTABLISHING USER RATES FOR WASTEWATER SERVICES; (BOUCHER)

Public Works Director Bill Boucher reviewed the proposed rate increase of 15% for the first year, and 10% for two successive years and 5% in the fourth year. He said the proposed increase will both serve the operational requirements of the Wastewater Collection and Wastewater Treatment Divisions, and also provide a means through which the current and past loans from the Wastewater Capital Improvement Fund can be repaid. Mr. Boucher stated staff and the Public Works Advisory Board recommend the City Council accept the Wastewater Revenue Study and increase wastewater rates through the adoption of Resolution No. 64-98.

Mayor Novak opened the hearing for public comment.

Harry Rogers stated it is easy to analyze the necessity of this rate increase.

John Barta stated the community needs to share in costs to save for tomorrow.

Jim Wood questioned the proposed rates for different commercial businesses (seafood processors will pay more than most other businesses).

Neil Farrell reminisced a story he wrote in 1992 regarding a house flooded with sewage.

Mayor Novak closed the public comment hearing.

The consensus of Council was in approval of the proposed wastewater rate increases; however, with the amendment to maintain the single family residential and multi-family residential surcharge at 10 ccf.

MOTION: Councilmember Peirce moved the City Council adopt Resolution No. 64-98 establishing user rates for wastewater services, with an amendment to maintain the single family residential and multi-family residential surcharge at 10 ccf. The motion was seconded by Councilmember Elliott and carried unanimously. (5-0)

B-6 REVIEW OF CODE ENFORCEMENT ACTION AT 430 PACIFIC STREET; (HUNT)

City Attorney Rob Schultz reviewed the abatement procedures for 430 Pacific Street. This was an informational item and no action by the City Council was necessary.

The City Council received the report and no further action was taken.

C. UNFINISHED BUSINESS

C-1 RESOLUTION NO. 60-98 ADOPTING FISCAL YEAR 1998/99 BUDGETS; (KOSER)

Finance Director Jim Koser presented the Fiscal Year 1998/99 Budgets as previously reviewed by the City Council and recommended adoption by approval of Resolution No. 60-98.

MOTION: Councilmember Peters moved the City Council adopt Resolution No. 60-98 approving the Operating and Capital Improvement Budgets and making Appropriations for Fiscal Year 1998/99. The motion was seconded by Councilmember Peirce and carried unanimously. (5-0)

C-2 RESOLUTION NO. 54-98 ESTABLISHING THREE-HOUR PARKING TIME LIMIT ON THE FOUR MID-EMBARCADERO WEST SIDE STREET ENDS AND CITY-LEASED PARKING LOT NEXT TO THE SHELL SHOP; AND ORDINANCE NO. 469 REVISING SECTION 10.36.120 (CURB MARKINGS) AND SECTION 10.36.170 (FOR A LIMITED TIME) OF THE MORRO BAY MUNICIPAL CODE - SECOND READING/ADOPTION; (BOUCHER)

Public Works Director Bill Boucher recommended approval of the second reading and adoption of Ordinance No. 469 revising Section 10.36.120 (Curb Markings) and Section 10.36.170 (For a Limited Time) of the Morro Bay Municipal Code, and adoption of Resolution No. 54-98 establishing Three-Hour Parking Time Limit on the Four Mid-Embarcadero West Side Street Ends and City-Leased Parking Lot next to the Shell Shop.

City of

Morro Bay
DEPARTMENT of PUBLIC WORKS

M E M O R A N D U M

to : Honorable Mayor and City Council

from : Director of Public Works

date : June 23, 1998

subject: Statewide Wastewater Rate Survey

I don't like to compare our rates to other communities during consideration of our needs. Now that you adopted my recommended structure last night perhaps you would like to know where our rates are now compared to other similar communities.

The State Water Resources Control Board (SWRCB) does biannual statewide rate surveys. The latest edition is dated April 1997(FY 1996-97 data). Current charges may now be higher for some agencies. The survey is based upon specific criteria to compare "apples to apples." I should note that for the purposes of this survey, we reported a service population of 10,000 although our actual population is slightly less. The rate comparison for comparable communities is as follows(*all rates are monthly for single family dwellings):*

CITY OF MORRO BAY: $10.44 per month

	Low	High	Average	Median
Statewide (755 reporting);	$2.71	$75.00	$18.11	$15.84
By population:				
All 1,000 to 9,999	$4.90	$75.00	$18.11	$15.84
All 10,000 to 49,999	$6.00	$42.50	$16.28	$15.00
Grant Funded WWTP				
1,000 to 9,999	$4.90	$58.40	$17.88	$16.50
10,000 to 49,999	$6.00	$42.50	$16.34	$15.00
Flow, BOD, SS based rate				
1,000 to 9,999	$5.00	$75.00	$18.03	$15.03
10,000 to 49,000	$6.00	$41.83	$16.30	$15.00
By Treatment Level (Advanced Primary):				
All	$4.90	$38.75	$16.17	$15.00
Grant	$4.90	$38.75	$16.58	$15.00
Flow, BOD, SS based rate	$7.50	$38.75	$16.49	$14.50
By County:				
All SLO County	$6.00	$33.50	$16.67	$15.00

Of the 23 agencies in our County reporting, with our $10.44 per month charge, there are four places of lower costs (Avila, Oceano, CSA 7A and South County San.) and the remaining 18 are higher than us. Oceano provides and charges for collection system only with treatment by So. County San. (I presume Oceano folks get two bills, one for collection, one for treatment). CSA 7A is north of Lake Nacimiento.

As the survey shows, even after the last of the four programmed increases, our monthly charge of $13.27 in FY 2001-02 will still be lower than the average and median for others in FY 1996-97. I'd guess one or more other communities might have an increase between now and then.

I hope this provides at least some usable information. Call me if you have any ?'s.

b

cc: City Manager
Finance Director
wtb:f\bill\ccouncil\wwrate98

B-3 REQUEST FOR POLICY DIRECTION ON SPECIAL WATER RATES; (BOUCHER)

Public Works Director Bill Boucher stated the City's Water Fund's financial status is reaching the point where existing and proposed special consideration of particular types of users may lead to the need for a community-wide rate increase to compensate for lost revenue. He noted if the current and proposed special rate consideration continues, the reductions in annual revenue will likely entail mitigation through a community-wide increase. If the special consideration is discontinued, future rate increases can be deferred, barring subsequent additional revenue reductions. Mr. Boucher stated the current special water rate for the one health care facility reduces Water Fund revenues by approximately $32,500 per fiscal year. He recommended the City Council determine that special water rates are contrary to the general well-being of the community by adoption of Resolution No. 86-97 modifying the Master Fee Schedule for existing reduced water rates for Licensed Health Care Facilities to be the same as the prevailing community rates.

Mayor Novak opened the hearing for public comment.

John Barta addressed supply and demand. He stated he supports the resolution; however, there is not a shortage of water now or in the future. Mr. Barta made the following suggestions: 1) retrofit should be ceased with the adoption of the City's water report by the Coastal Commission; 2) an increase in revenues should be implemented by requesting vacant lot owners to purchase a water meter for their lot; and 3) the school district should obtain 1" water lines instead of 3" lines.

Mary Phillips stated the cost of living at SeaShell Communities is extremely high and should be able to afford their water. She also noted State Water is allowing her to quit her reverse osmosis system which also saves money.

Harry Rogers stated the City should be run shrewdly, and special water rates should not be allowed.

Mayor Novak closed the public comment hearing.

Council consensus was to not allow special water rates.

MOTION: Councilmember Elliott moved the City Council approve Resolution No. 86-97 which determines that special water rates are contrary to the general well-being of the community. The motion was seconded by Councilmember Peirce and carried unanimously. (5-0)

Mayor Novak called for a break at 9:28 p.m.; the meeting resumed at 9:37 p.m.

AGENDA NO. B-3
Date 12/8/97 Action
CMBCDY. PW
- General Water Fund
- School Dist Wholesale
CMBCDY. FWhere
- Water Rates

CITY OF MORRO BAY
Department of Public Works

STAFF REPORT

Approved
(5-0)

TO: HONORABLE MAYOR AND CITY COUNCIL

FROM: DEPARTMENT OF PUBLIC WORKS

DATE: DECEMBER 1, 1997

SUBJECT: POLICY DIRECTION: SPECIAL WATER RATES

RECOMMENDATION

Staff recommends the City Council consider this matter, determine that special water rates are contrary to the general well-being of the community and approve Resolution No. 86-97 modifying the Master Fee Schedule for existing reduced water rates for Licensed Health Care Facilities to be the same as the prevailing community rates.

FISCAL IMPACT

The current special water rate for the one health care facility reduces Water Fund revenues by approximately $32,500 per fiscal year.

SUMMARY

The Water Fund's financial status is reaching the point whereat existing and proposed special consideration of particular types of users may lead to the need for a community-wide rate increase to compensate for lost revenue.

The purpose of this report is to discuss the matter and it's financial impacts to the community. If the current and proposed special rate consideration continues, the reductions in annual revenue will likely entail mitigation through a community-wide rate increase. If the special consideration is discontinued, future rate increases can be deferred, barring subsequent additional revenue reductions.

Discontinuation of special water rates is recommended through adoption of Resolution No. 86-97. Ordinance No. 440 requires such a discontinuation be done through a modification of the Master Fee Schedule.

Department Director
City Administrator

wtb:f\bill\water\rates\spclrt1

BACKGROUND

The community's water rate structure is a version of an "inverted block rate". This structure provides for philosophical encouragement of conservation through a progressively increasing unit cost for water. With the two-phased water rate increases in FY '94 and '95, both being of uniform percentages, all customers have seen an 85% increase in their monthly costs. A five billing unit (average single family dwelling) customer's monthly cost went from $14.91 in 1993 to $27.58 and a one thousand billing unit user went from $6,361.77 to $11,766.12. While the percentage increase is the same for these selected usages the increased dollar amount, by virtue of the rate structure, is significantly more for the higher volume customer.

During the public hearings on water rates in both 1994 and 1995 the City Council and the public strongly endorsed retaining the inverted block rate structure rather than implementing some other manner of billing, such as a "flat rate". Perhaps it is germane to provide an illustration of how a flat rate structure could vary in monthly costs for a cross-section of usages with equivalent annual revenues:

Usage	Inverted Block Rate	Flat Rate	Difference
5 units	$ 27.58	$ 33.75	+ $ 6.17 (22.4%)
10 units	55.98	67.50	+ 11.52 (20.6%)
20 units	115.04	135.00	+ 19.96 (17.4%)
50 units	327.37	337.50	+ 10.13 (3.1%)
58 units	391.09	391.50	+ 0.41 (0.1%)
59 units	399.20	398.25	- 0.95 (0.2%)
100 units	755.68	675.00	- 80.68 (10.7%)
500 units	5,217.36	3,375.00	- 1,842.36 (35.3%)
1,000 units	11,766.08	6,750.00	- 5,016.08 (42.6%)

As clearly shows, a flat rate structure provides significant cost reductions for high volume users compared to the inverted block rate, compensated through increases for low volume users with the "break even" usage being in the 58-59 billing unit per month range.

Proponents of the flat rate structure argued that the inverted block rate ignores the fact that it costs no higher unit cost to deliver each increased incremental billing unit of water. For example, delivering a sixth billing unit costs no more than each of the first five.

The flat rate structure was rejected after due consideration in both 1994 and 1995. At the 1995 public hearings on the matter, staff was directed to develop and implement an increased inverted block rate structure with a minimum monthly charge for users of 0-2 billing units per month at the cost for three billing units ($16.43), a 20% rate discount for customers in legitimate financial need and reduced rates for Licensed Health Care Facilities.

In the more than two years since the implementation of these programs, both the revenues and expenditures of the Water Fund have been above those previously predicted. The 1995 rate recommendation was based upon the following predicted revenues and expenditures, compared to unaudited "actuals" seen for FY 96-97:

Item	Predicted FY 96-97 Expenditures	Actual FY 96-97 Expenditures
Operations	$ 794,000	$1,088,699.75
Reserve Fund	50,000	0
Contingency Fund	100,000	0
Desal Debt Service	541,332	541,331.74
SWP Excess Allocation	60,000	0
SWP Capital & Operations	1,528,668	1,922,357.36
Capital Projects	407,000	229,400.00
Total	$3,481,000	$3,781,788.85
Total Revenue	$3,481,000	$3,724,379.91
Unaudited Balance	0	($ 57,408.94) 1.2%

NOTE: FY 96-97 audit showed a Water Operating Fund deficit of $49,498.

The State Water Project (SWP) expenditure increase can be primarily attributed to the requirement to pre-pay FY 97-98 operations costs for CCWA in the amount of $305,449. This was the first year for which the full costs for operations was charged and the cost for this was contemplated for subsequent years ($321,000 per subsequent year). The increases seen in the Operations category are attributable to significant Water Fund expenditures for water and for costs allocated to the General Fund. As the comparison shows, we have not allocated any monies for either Reserves nor Contingencies and proposed a significant reduction to Capital Projects in order to minimize the imbalance of the Fund.

In summary, the current rate structure generated about 1% less than needed to fulfill the level of Water Fund expenditures for fiscal year 96-97. Savings in expenditures for the Kings Tank Capital Improvement Project, and the re-allocation of these funds back to the Water Fund, allows for an overall Fund balance. This is a one time occurrence, not anticipated on an annual basis.

If we work within the scenario that a rate increase is only to be the last option pursued as mitigation, few options exist. Since expenditures cannot be feasibly reduced to below the current level, an augmentation of revenue is needed.

One option is to increase development impact fees above the current level of $364.23 per

water equivalency. For fiscal year 1996-97, a total of $34,146.45 was received. This option may generate sufficient annual funds to offset the reductions but in any given year the rate of new building may be such that no or little impact fees are received. As illustration, the total fees collected in fiscal year 95-96 were $12,707.12. In addition, funds received from development impact fees can only be used for capital expenditures, not for annual operations and maintenance activities. While revenue from increased impact fees would go far to accelerate the schedule for capital improvement projects, it is difficult to recommend that annual revenue from impact fees be depended upon to mitigate on-going revenue shortfalls.

Another option is to eliminate water rate discounts to special users.

DISCUSSION

Special water rates have been discussed for a number of types of high volume users, including seafood processing, laundromats, health care facilities and schools to offset their increased water costs. With approval of findings for the establishment of special rates for health care facilities in 1994, other users found themselves in the position through which to assert that they also provide unique and essential services to the community and should therefore be granted special financial consideration. The School District is the first of these additional users to seek access to such a special consideration.

With proliferation of the policy that special water rates are appropriate for users which provide unique and valuable services to the community, annual revenues of the Water Fund have experienced reductions, which can be expected to continue. As discussed above, the Water Fund cannot continue to absorb such reductions in annual revenues without compensating with a community-wide rate increase as mitigation.

One customer within the community, Sea Shell Community/Pacific Care Center, is currently receiving discounted water costs through a special and reduced rate structure approved in 1994 via Resolution No. 73-94. For the period of January, 1995 through October, 1997, this customer (a for-profit commercial facility) has benefited from a reduction in their water costs by more than $100,000, representing an overall total discount of almost 28%. This benefit is in addition to the more than $34,000 (more than 44%) in savings this customer has received over the same period from a previously approved alteration to their sewer rate. Together these discounts for the two City utilities amount to a total of 30.5% of the total potential revenue from the facility.

The percentage of savings for this customer considerably exceed that which the City affords to those customers eligible under the low-income 20% discount lifeline program. For fiscal year 1996-97, the one customer received a water discount in the amount of $32,460.00. This amount constituted more than 56% of the year's total unaudited Water Fund operational revenue shortfall, and almost 66% of the audited shortfall..

The special rate for health care facilities was based upon findings that this type of facility provides unique and essential services to the community. The consideration was approved after impassioned testimony from the facility's manager that portions of the increased costs for water could not fully be passed on to MediCare/MediCal patients in the form of care cost increases and would result in decreased level of care for the elderly.

In a County-wide survey of water agencies, it was found that no other agency provides special water rates to any type of user, including 21 licensed health care facilities located in the survey area. One agency provides a lifeline discount for economically needy customers, akin to the City's program.

The Water Fund does not appear to be able to continue absorbing the loss of revenue that the special rate gives this one business enterprise. As this business is not the only customer capable of demonstrating itself as providing a unique and valuable service to the community, other customers can be expected to follow suit and seek to acquire discounted rates.

The San Luis Coastal Unified School District is now seeking to reduce it's annual water costs. The District, having six separate meters for it's three schools, is the single largest customer of the Water Fund. In the past, discussions have been held on means through which the District can reduce it's costs that have now lead it to propose to cease to be a customer of the City but rather to import it's own source of water and "wheel" it through the City system. This proposal could reduce the District's costs by about $100,000 per year, with a commensurate reduction in Water Fund revenue.

This Department is currently performing an analysis of various options in the effort to determine whether there is some means through which a "win-win" solution can be reached that will both provide a cost reduction to the District in an amount and time frame acceptable to them but also not result in the need for an immediate community-wide rate increase as financial mitigation. At this point it is unknown as to whether this can be achieved but is appears clear that virtually any additional short-term revenue reduction cannot be absorbed.

SUMMARY

To provide financial mitigation for high volume users, a flat rate structure or special water rates have been considered. The flat rate structure was rejected. Implementation of a special rate for one particular user category was approved in 1994. With the financial ramifications of the current financial status of the Water Fund, it is now recommended to modify the existing special rate structure for health care facilities to the prevailing community rate via the adoption of Resolution No. 86-97. This elimination is necessary to reduce the need to implement a community-wide rate increase in the immediate future. If the School District proposal is approved, by whatever means, a rate increase may result if the loss of revenue cannot be fully offset.

RESOLUTION NO. 86-97

RESOLUTION MODIFYING SPECIAL WATER RATES FOR LICENSED HEALTH CARE FACILITIES

the City Council,
City of Morro Bay, California

WHEREAS, in 1994 via Resolution No. 73-94 reduced water rates were established for Licensed Health Care Facilities; and

WHEREAS, necessary annual expenditures of the Water Fund are such that the reduced revenue from continuation of such a rate would necessitate mitigation by means of a community-wide rate increase; and

WHEREAS, it is determined to be contrary to the public well-being to retain special consideration for one business category at the expense of a community-wide water rate increase; and

WHEREAS, Ordinance No. 440 requires the City Council to establish rates in the Master Fee Schedule for charges for water service to licensed health care facilities; and

WHEREAS, it is necessary and appropriate to modify said charges to be equal to the prevailing community-wide rates.

NOW, THEREFORE, BE IT RESOLVED, by the City Council, City of Morro Bay that the Master Fee Schedule is hereby revised to reflect that water rates for licensed health care facilities are the same as the prevailing community rate structure for water consumed effective the next regular period subsequent to this adoption.

PASSED AND ADOPTED by the City Council at a regular meeting thereof held on the 8th day of December, 1997 by the following vote:

AYES:
NOES:
ABSENT:
ABSTAIN:

ATTEST:

CATHY NOVAK, Mayor

BRIDGETT BAUER, City Clerk

Warren Dorn presented an American flag, made in Pasadena, to the City.

DECLARATION OF FUTURE AGENDA ITEMS - None.

A. CONSENT CALENDAR

Unless an item is pulled for separate action by the City Council, the following actions are approved without discussion.

A-1 MINUTES FOR THE REGULAR CITY COUNCIL MEETING OF OCTOBER 14, 1996

Mr. Howell recommended Council approve the minutes as submitted.

A-2 STATEMENT OF CASH AND INVESTMENTS - SEPTEMBER 1996

Mr. Howell recommended Council receive the report for information.

A-3 EXPENDITURE REPORT - SEPTEMBER 1996

Mr. Howell recommended Council approve the report as submitted.

A-4 RESOLUTION NO. 76-96 APPROVING APPLICATION FOR ENVIRONMENTAL ENHANCEMENT GRANT FOR QUINTANA ROAD BIKE LANES AND HABITAT RESTORATION

Mr. Howell recommended Council approve Resolution No. 76-96 and authorize the Mayor to sign the application.

A-5 RESOLUTION NO. 77-96 APPROVING ASSIGNMENT OF LEASE SITE 129W-133W FROM MILT GUGGIA ENTERPRISES TO MING DYNASTY INC.

Mr. Howell recommended Council pull this item from the agenda.

MOTION: Councilmember Unger moved the City Council approve the Consent Calendar with the exception of Item A-5. The motion was seconded by Councilmember Novak and unanimously carried. (5-0)

B. UNFINISHED BUSINESS

B-1 REPORT ON WATER RATES AND FUTURE COSTS

Public Works Director Bill Boucher presented a report requested by Council regarding the City's water rate structure which included components and current financial status, and potential future cost components not included in revenue/expenditure consideration.

Councilmember Unger referred to Page 2, asking about the expense of running the desal facility.

Mr. Boucher responded the plant cost more than $1,000 per acre foot in 1995, not counting debt service.

Councilmember Anderson asked if there are any indications the City is not paying enough at this time to cover State Water costs.

Mr. Boucher responded there could be an accumulation of factors over time, such as increased State Water debt service, loss of the school district, or Proposition 204. He noted he does not contemplate a rate increase of extreme magnitude.

Councilmember Crotzer stated he does not believe people know the City is trying to double the amount of available State Water at this time. He expressed concern about infrastructure collapse because of artificially low water rates. Councilmember Crotzer asked if there is a capital financing and prudent reserves plan in place.

Finance Director Jim Koser responded the current rate structure provides no funds for capital projects or reserves, except as listed in the report.

Councilmember Crotzer stated the State Water Project has historically been unable to meet deliveries, and the City is trying to double its allotment from 1,313 to 2,626 acre feet which will increase the City's obligation to pay for future improvements or catastrophic repairs.

Councilmember Unger stated the City has been paying for the State Water Project since incorporation in 1964. She pointed out the citizens of Morro Bay voted for State Water, and she has been telling people rates look level at this time.

Councilmember Crotzer stated passage of Proposition 204 could impact water costs. He noted he has informed people all along the cost of State Water would not be less than $500 per acre foot.

Mayor Yates stated rates have been increased twice in the last four years, and obligations are being met. He said he believes future increases will not amount to more than 1% or 2%, although there is no crystal ball to predict the future.

Councilmember Anderson stated he requested this report because he is concerned rates do not cover costs. He said he wants to know what the rate increase would cover in order to determine what other measures would be necessary. Councilmember Anderson stated

money will be available for capital projects when the desal plant is paid for.

No further action was taken on this item.

Mayor Yates called for a break at 7:36 p.m.; the meeting resumed at 8:05 p.m.

C. NEW BUSINESS

STATUS REPORT ON NATURAL HISTORY MUSEUM RENOVATION PROJECT

This report was presented during the Public Comment Period.

D. PUBLIC HEARINGS, REPORTS & APPEARANCES

D-1 CONSIDERATION OF APPEAL OF PLANNING COMMISSION CONDITIONS FOR APPROVAL OF CONDITIONAL USE PERMIT 10-96; (PRICE: APPLICANT/APPELLANT; 2040 IRONWOOD AVENUE: LOCATION)

Acting Planning Director Shauna Nauman reviewed the conditions for approval of Conditional Use Permit 10-96 which the Planning Commission approved at their September 16, 1996 meeting. The appellant, Geraldine Price, is appealing the requirements for a drainage way and paved driveway stating these are unnecessary burdens which serve no beneficial purpose. Ms. Nauman recommended the City Council deny the appeal and uphold the Planning Commission's conditions of approval, and direct staff in regards to the refund of the appeal fee.

Mayor Yates opened the hearing for public comment.

Geraldine Price, appellant, requested the City Council remove the conditions of approval for drainage and parking requirements. She noted flooding has not been a problem on her property, except for the floods of 1995. Mrs. Price stated the addition of one room and one spout to the apartment will not create a change in water flow. She asked for less costly alternatives of surfacing the driveway stating the code allows gravel driveways. Mrs. Price also noted there is plenty of parking space on the property. She said her tenant would like to continue to park by his house to protect his car against neighborhood car burglaries. Mrs. Price also requested Council consider the refund of her appeal fee.

Thad Baxley requested the City Council deny Conditional Use Permit 10-95, as a laundry room has been made into a studio apartment in violation of the building code. He said increased traffic has increased the amount of water run-off on his property. Mr. Baxley stated he asked Mrs. Price to install additional drainage, and he was told it was his problem as he lived down the hill from her. He asked the Planning Commission

AGENDA NO. B-1
Date 10/28/96 Action

CITY OF MORRO BAY

STAFF REPORT

TO: HONORABLE MAYOR AND CITY COUNCIL

FROM: DEPARTMENT OF PUBLIC WORKS AND FINANCE DEPARTMENT

DATE: OCTOBER 28, 1996

SUBJECT: REPORT ON WATER RATES AND FUTURE COSTS

RECOMMENDATION

Staff recommends the City Council receive and file this report.

FISCAL IMPACT

None identified.

SUMMARY

Considerable discussion has been held regarding the current water rates structure's ability to accommodate current and future expenditures. At the October 14 City Council meeting the two Departments were directed to prepare a report discussing the matter.

The report is divided into two sections: discussion of Water Rate Structure, including components and current financial status, by the Finance Department and discussion of "what ifs" of Potential Future Cost Components Not Included in Revenue/Expenditure Consideration by the Public Works Department.

In summary, the current rate structure, while not able to withstand unanticipated reductions in revenues nor unforeseen expenditures, is capable of meeting current and programmed future expenditures. In other words, the Fund has been, and remains, pay as you go to the greatest extent.

Department Director
City Administrator

BACKGROUND

The community has seen two water rate increases, totaling a compounded increase of almost 85%, since June, 1994. These increases were implemented in a two-phased approach; a 35% increase in June, 1994, via Resolution No. 56-94, to meet the minimum revenue requirement of the then-applicable State Water Project (SWP) debt service (pending the results of Measure J) and a 37% increase in May, 1995, via Resolution No. 57-95, to provide for long-term SWP debt service payment and related capital improvements. A portion, albeit small, of the second increase was to mitigate the approved special water rate structure for health care facilities.

Since these water rate increases, discussion and debate has occurred regarding the adequacy of the revenues derived from the rate structure for future needs. Staff has presented reports regarding programmed future capital improvements a number of times but discussion continues relating to significant water rate increases in the near future. At the October 14, 1996 City Council meeting, staff was directed to provide a report on this subject. Projects such as the Kings Avenue Water Tank, current SWP and desalination debt service, SWP reliability insurance and similar tasks have been discussed in the past and are not included in this report.

The attached sub-report by the Finance Department discusses the current financial status of the Water Fund and related matters. The Public Works Department has prepared the attached analysis of "what ifs", that is, the potential financial impacts of various un-programmed projects and revenue reductions.

It should be noted that despite efforts to the contrary, there is no reliable means through which to accurately predict what costs will be long into the future.

The annualized costs for the SWP debt service have increased for the current fiscal year ($115,215), per the Finance Department's sub-report. Certain other unanticipated costs, particularly tasks required by the SWRCB as conditions of the groundwater appropriative rights permits and full implementation of the Cost Allocation Plan, have also occurred. These increases have been offset through deferring expenditures for other capital improvements into subsequent years without impacting the current water rates. Refinancing of the SWP revenue bonds, currently proposed, can provide significant offset to the recent SWP debt service increases (about $75,000) but also increases the length of time over which debt service repayment occurs.

The current rate structure does not provide for significant accumulation of capital reserves ($80,000 this year). Without such accumulation, the Fund serves on a cash needs approach. Unless additional and significant unanticipated expenditures and/or revenue reductions arise, individually or cumulatively, the Fund can meet the current and programmed needs. Once the Desalination Facility debt service ($541,332 per year) is retired it is anticipated that the Fund will be capable of reserve fund accumulation.

The following sub-reports provide additional information.

FINANCE DEPARTMENT SUB-REPORT FOR OCTOBER 28, 1996 CITY COUNCIL MEETING

TO: HONORABLE MAYOR AND CITY COUNCIL

FROM: FINANCE DIRECTOR

DATE: October 28, 1996

SUBJECT: WATER RATE STRUCTURE

RECOMMENDATION

This report is provided for informational purposes only. Staff recommends that the City Council accept this report.

FISCAL IMPACT

None.

BACKGROUND

At the regular meeting of October 14, 1996, the City Council directed that the Public Works Director and the Finance Director prepare reports on water rates and possible future increases in water rates. The Public Works Director's report addresses many of the operational issues and capital project plans for the future. This report is intended to provide background on the rate setting process and the financial implications of different scenarios.

DISCUSSION

Background Financial Information

This analysis begins by looking at the most recent audited financial statements for the City of Morro Bay. On June 30, 1995, the audit shows we had three water related funds; the Water Operating Fund is the fund used to account for all operating revenues and expenses, including debt service and interfund transfers; the Water Maintenance (System) Fund is an inactive fund, with no activity in the audited year; the Water Capital Improvement Fund is used to accumulate capital for future capital project needs, in the audited year and in FY 1995-96 it was also used to fund debt service. At June 30,1995, the audited financial statements included the following fund balances:

Finance Department Sub-report
Water Rates/Expenditures, October 28, 1996
Page 2

Water Operating Fund	$152,208
Water Maintenance Fund	$ 7,325
Water Capital Imp Fund	$333,470

Total Fund Balance All Funds	$493,003

The Fiscal Year 1995-96 audit is well underway and audited financial statements should be available within a couple of months. Based upon the unaudited results of operations for Fiscal Year 1995-96, we would expect to see the following fund balances at June 30, 1996:

Water Operating Fund	$(76,753)**
Water System Fund	$ 7,325
Water Capital Imp Fund	$650,000

Total Est. Fund Bal. All Funds	$580,572

** The negative fund balance resulted from transferring all budgeted capital project contributions to the Capital Improvement Fund.

Thus, at the start of the current fiscal year, FY 1996-97, the Water Funds have no resources that are not committed to current work-in-progress. The Fiscal Year 1996-97 Water Operating fund budget is balanced and includes an $80,000 transfer to reserves. Unless unexpected events arise, the Water Operating Fund should be able to restore the deficit and achieve an ending fund balance of $0.

Components of the Rate Structure

Obviously, with no reserves available to subsidize water rates. The City needs to raise enough revenue to cover its current obligations. Current obligations are those shown in the budget for the Water Revenue Fund. They include the salaries and benefits of six (6) employees charged directly to the fund, operating and maintenance supplies, utilities, professional services, insurance, communications and various other services make up the direct operating expenses. Indirect operating expenses include capital to fund current year projects, not otherwise funded, the costs of support services provided by employees not charged directly to the fund, and a transfer for capital accumulation for future projects. The final component of the current operating budget is the amounts provided for debt service on State Water and the De-Sal plant. The total FY 1996-97 Operating Budget is $3,448,328.

The components of FY 1996-97 Water Revenue Fund revenues are water rates, connection fees, penalties and late charges and interest on idle funds. Projected revenues are $3,474,181. For these revenues 97.27% come from water rates. Our rate setting approach is known as the "Cash Needs

Approach", and that is descriptive of how we have operated in recent years.

Effect on Future Water Rates

Since water rates are set to cover current costs, and little else. We can avoid future water rate increases only to the extent that we can control those costs. The largest component of our cost is debt service which currently represents 62.93% of the total budget. Of the debt service component, the portion for servicing the De-Sal Plant will remain constant at $541,332 through FY 2002-03. The portion for servicing State Water is actually paid through San Luis Obispo County Flood Control District. The county recently provided us with their projects through FY 97-98 and the project increase from FY 1996-97 is $115,215. This amount would not necessarily require a rate increase but would require other budgetary reductions, such as reducing transfers for capital projects.

Another factor affecting water rates that has not been mentioned thus far is an increase in metered flows. This can occur because of general consumption increases as customers acclimate to the current rates, or due to an increase in the number of customers. Projections for the next couple of years include a modest increase in the number of customers, which will result in increased revenues from existing rates.

Philosophical Issues and Ultimate Control of Rates

There is a most significant aspect of the water rate setting process that has less to do with numbers and more to do with philosophical issues. Issues in this arena include but are not limited to the effect of rates on water conservation; the question of who benefits from the provision of state water and concomitant improvements, is it current customers or future customers who benefit most?; should rates be structured to favor residential users over business users?; should there flat charges, such as meter charges, and then slightly lower rates based on consumption?; should out-of-town users pay a larger share? Questions such as these can dramatically effect rates and how they are answered is to a large degree out of the control of staff. To that extent, any projections of future rate changes is subject to qualification.

CONCLUSION

Based upon the known financial information, no rate increase above those set in July, 1995, will be needed for the current fiscal year. For next fiscal year, the increased cost due to inflation and higher debt service can be absorbed by the existing rate structure if other costs are reduced. The City of Morro Bay will continue to remain vulnerable to unforeseen events due to the lack of reserves in the Water Funds. Future rate setting should consider incorporating a sound financial plan which would include the development of a capital financing plan and prudent reserves. In that way, ratepayers can be shielded from increases resulting from emergencies.

POTENTIAL FUTURE COST COMPONENTS NOT INCLUDED IN REVENUE/EXPENDITURE CONSIDERATION

1. **Statewide State Water Project Improvements:** With the City's participation in the SWP it has obligation for pro rata share of statewide projects. Current statewide SWP subscriptions amount to approximately four million acre feet per year. If and when SWP excess allocation is secured, the City's share may be determined to be 2,626 acre feet although it's "capacity" share remains at 1,313 acre feet.

Improvements to the statewide system are under consideration, most particularly improvements and environmental mitigations in the Bay-Delta area. Proposition 204 on the November, 1996 ballot includes bonds in the amount of $193 million for Bay-Delta Improvements and $390 million for CALFED Bay-Delta Ecosystem Restoration, totaling $583 million. If this ballot measure passes and is implemented, the City's total pro rata share would be about $192,000 (for 1,313 acre feet) or about $384,000 (for 2,626 acre feet). With a bond rate of 6% over 30 years, the debt service for the City's share would be about $14,000 per year (1,313 acre feet) or $28,000 per year (2,626 acre feet).

While it is likely these costs could be incorporated into the current rate/revenue structure without necessity for an additional increase, the total increase in Water Fund annual costs for the $28,000 per year debt service is less than 1%.

In the future there may be additional statewide SWP system projects proposed. The City's ratepayers would be obligated to pay similar pro rata shares of any and all of these projects. Depending on the time frame within which these future projects are proposed and implemented, the City's costs may result in incremental annual cost increases. If subsequent projects are pursued prior to the retirement of the current bond debt service, total annual costs would increase but for any projects implemented after the retirement of the proposed re-financed SWP bond (in the year 2026) the ratepayers would have already seen deletion of the $1.9 million per year SWP debt service.

It is not possible to quantify whether and when any additional statewide projects, above and beyond those contained within Proposition 204, would be proposed.

2. **Additional Potable Water Storage (or equivalent mitigation) if Chorro Valley Water is Unavailable:** As result of the conditions of approval for the City's recently-issued groundwater appropriative rights permits, the potential exists that the community may lose the availability of the Chorro Valley wells during periods wherein the streamflow of Chorro Creek is below 1.4 cubic feet per second. The streamflow has historically been below this threshold level rate of flow between the months of May through November of most years.

At the current rate of consumption (1.56 million gallons per day in August, 1996), potable water demands can be met in the short-term by full deliveries from the State Water Project and the City's Morro Valley wells. With the issuance of non-emergency permits for the desalination facility, there exists the ability to augment these production capabilities, although this operation is quite expensive and not contemplated as a long-term operational scenario.

As the community's population increases in accord with adopted planning policies, with the resultant increase in water demand, there will be a point whereat conjunctive use of State Water and the Morro Valley wells cannot meet peak summer demands. When this occurs in time is dependant upon the rate of new and/or more intensive development. With the delivery of 1.17 million gallons per day (mgd) from the SWP and permitted extractions of 0.68 mgd from the Morro Valley wells an increased summer demand of about 18.5% can be accommodated.

To be prepared for this seemingly eventual condition a number of options exist, several of which are now under pursuit.

-The City is pursuing judicial relief from the permit conditions which limit Chorro groundwater extractions based upon streamflow thresholds;

-This Department will be conducting a study of the City's Chorro Valley Ashurst well field, within which the City has five wells, to determine if, and if so to what extent, operation of these wells impacts streamflow. This study is specifically referenced in the permits and the City is eligible for permit amendments resultant of the conclusion of the study. Funds for the study were allocated in the current fiscal year budget and are being accumulated from the current water revenues. The study will be performed by a duly-qualified geo-hydrologist in conjunction with the Department of Fish and Game, the Regional Water Quality Control Board, National Estuary Program and other interested parties.

With the inability to shut down the Chorro Valley wells for any extensive period prior to delivery from some supplemental water source, the permit provides for preparation of the study after commencement of the deliveries. In informal discussion with SWRCB staff, it was alluded that the delay in issuing the groundwater permits since 1985 was result of waiting for the City to select and implement a supplemental water resource. Upon initiation of SWP deliveries, it will be necessary to wait until streamflow conditions drop to a rate whereat the study can provide the best science possible. It is anticipated that the study may be performed in late-summer, 1997.

-Irrespective of the results of this study and the possible permit modifications/amendments, the City is pursuing a wastewater reclamation feasibility study under a grant from CDBG. The study is being introduced to the City Council and the public as a separate agenda item at the October 28, 1996 meeting.

The concept under consideration involves providing a treated wastewater discharge into the Chorro Creek watershed. Among the potential range of positive impacts to the watershed is the increase and regularizing of streamflow, particularly during low flow conditions. With an eventual discharge of 1.47 mgd, a 24-hour per day maximum flow rate of 2.27 cubic feet per second can be achieved as augmentation to existing creekflow. This rate of flow into the watershed would be more than the City would be extracting from the watershed as potable water and due regulatory consideration should be allowable.

-Construct storage facilities to hold water produced in winter and spring and deliver in summer and fall. This concept was outlined as a potential mitigation of cessation of groundwater extractions from the Chorro Valley in an August, 1995 City Council staff report on the matter of the impacts of the groundwater rights permits. While no cost estimates were provided, it was stated that the costs would be significant to add 48 million gallons of unprogrammed storage and potential treatment needs.

No such proposal exists nor can a circumstance be contemplated wherein a proposal with that magnitude of financial impacts upon the ratepayers would be considered by this Department to be a valid proposal. Other more feasible options exist which were not fully available in 1995, some outlined above, to restore Chorro Valley well operation. Restoration of Chorro Valley groundwater on a year-round basis is a critical component of future water supply in accord with current community planning policies.

-In the referenced August, 1995 staff report an alternate concept was outlined in which the community could revise it's General Plan and associated policy documents to accommodate the reduced population projections which could result from total loss of Chorro Valley water resources in the summer and fall, albeit without other mitigating circumstances. This option remains, as a concept, not a proposal, but is unexplored.

3. **Unanticipated Revenue Loss Caused by San Luis Coastal Unified School District Proposal to Subscribe to State Water Project or Nacimiento Water Project:** The School District, with it's three schools in the City, is one of the single highest sources of revenue for the Water Fund. The District has proposed to cease to be a customer of the City's water system and to receive water from either the State Water Project or the Nacimiento Project. While the District proposes to pay the City a modest annual amount for "wheeling" it's water through the City's system and would be subject to a pro rata share of costs in the Chorro Valley Pipeline, this proposal, if enacted, would result in substantial annual reductions in Water Fund revenue, possibly in excess of $100,000 per year.

The financial impact of this proposal could necessitate a rate increase to offset the revenue loss if offsetting expenditure mitigations cannot be accomplished.

Staff is in the process of determining whether the City is compelled to allow for this water customer to obtain an independent source of water. If no such compelling law exists, a recommendation to deny the proposal would be forwarded or, alternately, negotiations with the District would, by necessity provide adequate offset in revenue.

4. **Substantial Reductions in Water Use:** Water consumption estimates through which the current rate structure was developed were quite conservative. Actual consumption for the last two years has been about 3% higher than estimated and revenues have been slightly higher than predicted, albeit very slightly.

With the commencement of supplemental water supplies and revision of the Water Allocation Model and associated documents, the total number of water connections is predicted to increase modestly (by 30 customers per year) and thereby increase overall water consumption, without adversely impacting per capita consumption. In the event that overall water use increases along these lines of projection, certain accommodation can be provided for unanticipated expenditures. If, however, water usage decreases, the available revenues may not meet needs.

wtb:f\bill\ccouncil\water\1096rates

RESOLUTION NO. 57-95

RESOLUTION AMENDING THE MASTER FEE SCHEDULE INCREASING WATER RATES

THE CITY COUNCIL
City of Morro Bay, California

WHEREAS, the City wishes to continue to provide an adequate and reliable potable water supply; and

WHEREAS, to that end the City has approved participating in the State Water Project, construction of a desalination facility, and certain improvement projects necessary to treat, store and deliver potable water; and

WHEREAS, the existing water rate schedule delineated in the Master Fee Schedule does not provide for revenues adequate to meet identified needs for fiscal year 1995-96; and

WHEREAS, it is therefore appropriate and necessary to increase water rates effective July 1, 1995; and

WHEREAS, it has been deemed appropriate to provide for said increase through a uniform percentage increase to the water rate structure delineated in the Fiscal Year 1994-95 Master Fee Schedule; and

WHEREAS, it has been further determined appropriate to revise the minimum monthly charge for potable water.

NOW, THEREFORE, BE IT RESOLVED by the City Council of the City of Morro Bay that the Master Fee schedule is hereby amended to reflect a uniform increase in water rates of 37% above those rates established in Resolution No. 56-94.

BE IT FURTHER RESOLVED the minimum monthly water billing rate shall be at that rate established for three billing units, irrespective of metered consumption of lesser amounts.

PASSED AND ADOPTED by the City Council of the City of Morro Bay at an adjourned regular meeting thereof held on the 25th day of May 1995 by the following vote:

AYES: Anderson, Unger, Yates

NOES: Crotzer, Novak

ABSENT: None

ABSTAIN: None

WILLIAM YATES, Mayor

ATTEST:

BRIDGETT BAUER, City Clerk

LC:5:57-95A

CMBCOY. FINANCE
- Water Rates

MEMORANDUM

TO: Honorable Mayor and City Council

THROUGH: Forrest Henderson - City Administrator

FROM: Jon G. Crawford - Director of Public Works / City Engineer

DATE: February 25, 1994

SUBJECT: Additional Water Rate Options Requested By WAB

At their recent special meeting on Wednesday February 23,1994 members of the Water Advisory Board requested some additional options to the proposed water rate structures. Both options were based on the inverted block rate but deleted and reduced the impact fee, respectively. A copy of what has been transmitted to the Board members is attached for the City Council's information and use.

cc: Water Advisory Board
Rudy Hernandez - Finance Director
Bill Boucher - Operation Manager

JGC/jgc

WABTRANS.2CD

WAB REQUESTED OPTION 2C INVERTED BLOCK RATE
NO IMPACT FEES

Water Consumption	Unit Cost	Cumulative Costs	% Expense
0-2 units	$6.08	$12.16	106.5%
3-4 units	$6.38	$24.92	109.6%
5-8 units	$6.70	$51.72	114.8%
9-12 units	$7.04	$79.88	118.7%
13-16 units	$7.39	$109.44	122.3%
17-20 units	$7.76	$140.48	125.9%
21-25 units	$8.14	$181.18	128.7%
26-50 units	$8.55	$394.93	123.1%
51-100 units	$8.98	$843.93	106.6%
101-150 units	$9.43	$1315.43	97.0%
151-200 units	$9.90	$1810.43	91.6%
201-300 units	$10.39	$2849.43	85.4%
301-500 units	$10.91	$5031.43	78.4%
501-750 units	$11.46	$7896.43	73.7%
751-1000 units	$12.03	$10,903.93	71.4%
1001-1500 units	$12.63	$17,218.93	69.1%
1501-2000 units	$13.26	$23,848.93	

WAB REQUESTED OPTION 2C INVERTED BLOCK RATE
IMPACT FEES = $10,000 PER EQUIVALENCY

Water Consumption	Unit Cost	Cumulative Costs	% Expense
0-2 units	$4.85	$9.70	64.5%
3-4 units	$5.10	$19.90	67.4%
5-8 units	$5.35	$41.30	71.5%
9-12 units	$5.62	$63.78	74.6%
13-16 units	$5.90	$87.38	77.5%
17-20 units	$6.19	$112.14	80.3%
21-25 units	$6.50	$144.64	82.6%
26-50 units	$6.83	$315.39	78.2%
51-100 units	$7.17	$673.89	64.9%
101-150 units	$7.53	$1050.39	57.3%
151-200 units	$7.90	$1445.39	52.9%
201-300 units	$8.30	$2275.39	48.0%
301-500 units	$8.71	$4017.39	42.4%
501-750 units	$9.15	$6304.89	38.7%
751-1000 units	$9.61	$8707.39	36.9%
1001-1500 units	$10.09	$13,752.39	35.1%
1501-2000 units	$10.60	$19,052.39	

City of Morro Bay
DEPARTMENT of PUBLIC WORKS

MEMORANDUM

to : Public Works Advisory Board

from : Director of Public Works

date : September 6, 1996

subject: Sun Bulletin Article Regarding Cayucos Water Rates

In an article in the September 4 - 10, 1996 issue of the Sun Bulletin, attached, increases in water rates for the community of Cayucos were outlined. The rate increases are driven by the construction of a water treatment plant to treat existing groundwater resources under the influence of a surface body of water (Surface Water Treatment Rule). This regulation is the same one which lead the City to cease operation of Wells 8 and 12 several years ago due to the costs involved in construction and operation of a treatment plant.

It may be germane to point out that the costs the Cayucos ratepayers are now experiencing are those to treat their existing supply, not for a supplemental source. Note that there are three suppliers in Cayucos; CSA-10A, Paso Robles Beach and Morro Rock Mutual.
Morro Rock Mutual isn't increasing rates at this time.

A cursory comparison of their new residential rates and Morro Bay's is revealing:

Supplier	Consumption	Monthly cost
Morro Bay	0-3 billing units	$16.43
Morro Bay	5 billing units	$27.58
CSA -10A	Flat (5/8")	$25.00 (billed every 2 months at minimum $50/10 billing units)
P.R. Beach flat	Flat (5/8")	$24.00 ("Water usage is then tacked on to the fees." Additional costs unspecified.)

For customers using up to 3 billing units per month CSA-10A rates are 52% higher than Morro Bay's and P.R. Beach's are 46% higher (at least).

Presumably, the acquisition of supplemental water resources for Cayucos will result in additional increases.

wtb:f\bill\pwab\cayrates

ATTACHMENT B

MEMORANDUM

TO: Honorable Mayor and City Council

THROUGH: Forrest Henderson - City Administrator

FROM: Jon G. Crawford - Director of Public Works / City Engineer

SUBJECT: Proposed Water Rate Increases

Enclosed please find a copy of the staff report to the Water Advisory Board regarding the proposed increase in water rates. I am available to respond to your questions and concerns on the approach I took and how I hoped to spread the costs. Also included is the City of San Luis Obispo's impact fee ordinance as an example of the approach we can take in reducing the potential impacts to our consumers.

cc: David Hunt

JGC/jgc

TESTTHRU.DOC

AGENDA NO. IV. 2
Date 2/9/94 Action

CITY OF MORRO BAY
DEPARTMENT OF PUBLIC WORKS

STAFF REPORT

TO: WATER ADVISORY BOARD

FROM: DEPARTMENT OF PUBLIC WORKS

SUBJECT: PROPOSED WATER RATE INCREASE AND ALTERNATIVE RATE STRUCTURES

RECOMMENDATION

Staff recommends the Water Advisory board review the proposed rate structures and provide direction where the Board interprets the need for revision. Staff would further recommend the Board recommend Option 2A, Inverted Block rates in conjunction with the adoption of water impact fees for new construction. Staff would further recommend the Board also request the City Council to adopt the full needed increase at the earliest possible date and not subject the consumer to multiple increases.

SUMMARY

When the desalination facilities were constructed, all the focus of the existing rate structure was whether the debt service for these facilities could be covered. The long term needs of the existing delivery system and its expansion were non-existent. In addition the necessary rate structure to pay for the short term construction costs and the long term delivery costs of the State Water Project were not addressed. During the FY 1993-94 budget cycle, staff had included a 25% increase in the existing rate structure in order to get a jump on the revenue needs for the System. The proposed increase was removed from the budget and a majority of the existing reserves were used to balance the budget for the fiscal year. The existing budget of $6,466,674 with $290,000 in reserves is offset by revenues of $1.8 M from rates and fees, a DWR loan of $2.5 M, $1.4 M in one time reimbursement (desal lease/option agreement) and $1.05 M in one-time transfers from reserve funds.

With the City Council's decision of December 13.1993 directing staff to pursue State Water as the favored option of the draft Water Management Plan for the City, staff sees the immediate need to revisit rate increases in order to meet the City's contractual obligations to the County for state water delivery and as a way to raise revenues to meet the existing deficiencies within the system, respectively. Staff also has noted the concerns of individual City Councilmembers and the WAB that the existing rate schedule is complicated at best and places too great a burden on the high-end

users. With these things in mind, staff has generated some flat rate schedules and also an inverted block rate schedule. The results of these options are attached for your consideration. Another inverted block rate schedule that provides separate rate structures for residential and one for the remainder of uses has not been fully calculated but should be available for the Board's review at their meeting.

REVENUE REQUIREMENTS AND IMPACT FEES

In order to determine the required rate increase, or in this case the new structure, staff first generated the needed budget for the Water Division for the next five years and then projected a subsequent budget upon completion of payment of the desalination facility. The resulting numbers are attached for the Board's use. Several things could revise these numbers; slower construction and/or demand on the system would slow need for capital facilities, setting of lower reserves, alternative sources of revenue such as state revolving fund or potential buy-in of the Chorro pipeline by the County (Los Osos) would lessen or spread some costs over a longer period of time at a lower rate, extended period of drought would deplete reserves and necessitate greater reliance of higher cost water. However, it is staff's opinion that the budgets presented reflect the best available numbers over the next 10+ years and with the exception of inflationary change, should allow the necessary flexibility in the operation of the system with the lowest possible rate at the desired water quality. Sure, there will be years when the reserves will rise and fall with the weather, but the consumers have asked and the City is obligated to provide water at the tap in the quantity and quality they desire.

However, it is not staff's intent to burden the existing rate payers with the full cost of bringing water to this community. New construction must pay its way in both the external source and delivery of water (State Water) and in the required expansion of facilities (tanks, pumps, etc.) which are solely due to the added burden placed on these facilities by new construction. Staff, therefore, has presented the rate structures with an option that includes the adoption and implementation of a water impact fee for new construction. Initial calculations derive a direct impact of approximately $27,000 per each new equivalency of use. Since the person(s) will also be contributing through water use and it is unrealistic at this time to expect the construction community to accept such a fee and still continue to build, staff is of the opinion that setting a fee at 60% of the true impact would be an acceptable value. Under this justification, the impact fee would be established at $16,200 per equivalency which at 80 equivalencies per year reduces the needed revenue and therefore the impact on existing consumers by $1.3 M per year. Staff is requesting the WAB confirm their prior action requesting the Council look into including an impact fee as an option to the retrofit program and as a means of directing the costs of developing new sources of water on those who impact the system and thereby requiring the City to seek these alternative sources. These new fees will not be able to be implemented until the Management Plan has been adopted by the Coastal Commission and a subsequent concurrent LCP Amendment regarding the retrofit program is sought and acted on. This should not severely impact the

revenue stream since the first years revenue needs are less and construction is only now rising from its economic woes. Attached is a copy of the City of San Luis Obispo ordinance regarding development impact fees.

WATER RATE OPTIONS

The various options are attached for your review. Staff will be available at your meeting for discussion of how the rates were obtained/calculated and other potential options. As a comparison, if the existing rate formula were to be continued, a one time increase of 229% would be required to generate the revenues shown while "only" a 133% increase if impact fees are adopted.

Annual Increase

Adoption of any of the proposed rate structures does <u>not</u> eliminate the need for continued review and increase of rates due to changes in construction costs, other forms of inflation or need to accelerate needed facilities. It is also anticipated that the proposed impact fee will need to be annually updated (read:increased) to correlate to the increased impacts on the system.

jgc:watrrate

SUMMARY OF RATE INCREASE OPTIONS

OPTION 1A - FLAT RATE/SINGLE INCREASE

$6.55 per unit - effective April 1, 1994

Range of % Increase = *+124% to -4%* *Avg. = 118.0%*

OPTION 1B - FLAT RATE/MULTIPLE INCREASE

$5.00 per unit - effective April 1, 1994 *(Avg. = 67.7%)*

$6.00 per unit - effective December 1, 1994 *(20%)*

$6.78 per unit - effective July 1, 1995 *(13%)*

OPTION 1C - FLAT RATE/SINGLE INCREASE

Require Implementation of Impact Fees = **$15-17,500/equiv.**

Assume 90 equivalencies of impact

$4.45 per unit - effective April 1, 1994 *(Avg. - 49.2%)*

OPTION 1D - FLAT RATE/MULTIPLE INCREASE/IMPACT FEES

$3.96 per unit - effective April 1, 1994 *(Avg. = 32.8%)*

$4.51 per unit - effective July 1, 1994 *(13.9%)*

OPTION 2A - INVERTED BLOCK RATE

Requires Adoption of Impact Fees = $15-17,500 per Water Equivalency

Water Consumption	Unit Cost	Incremental Costs	Cumulative Costs	% Increase
0-2 units	$4.08	$8.16	$8.16	39.30%
3-4 units	$4.29	$8.58	$16.74	40.80%
5-8 units	$4.50	$18.00	$34.74	44.30%
9-12 units	$4.73	$18.92	$53.66	46.90%
13-16 units	$4.96	$19.84	$73.50	49.30%
17-20 units	$5.21	$20.84	$94.34	51.70%
20-25 units	$5.47	$27.35	$121.69	53.60%
26-50 units	$5.74	$143.50	$265.19	49.80%
51-100 units	$6.03	$301.50	$566.69	38.70%
101-150 units	$6.33	$316.50	$883.19	32.30%
151-200 units	$6.65	$332.50	$1,215.69	28.60%
201-300 units	$6.98	$698.00	$1,913.69	24.50%
301-500 units	$7.33	$1,466.00	$3,379.69	19.80%
501-750 units	$7.70	$1,925.00	$5,304.69	16.70%
751-1000 units	$8.08	$2,020.00	$7,324.69	15.10%
1001-1500 units	$8.48	$4,240.00	$11,564.69	13.60%
1501-2000 units	$8.91	$4,455.00	$16,019.69	0.00%

Budgetary Estimates for Water Rates

	1993-94	1994-95	1995-96	1996-97	1997-98	1998-99	...	2003-04
Expenditures								
Allocated Costs	$179,000	$193,000	$208,000	$219,000	$236,000	$255,000	...	$375,000
Personnel Costs	233,000	276,000	290,000	344,000	362,000	380,000	...	485,000
Supplies (Office)	47,000	49,000	52,000	55,000	57,000	60,000	...	73,000
Services and Charges	455,000	565,000	723,000	759,000	798,000	837,000	...	1,068,000
Capital Outlay	0	30,000	30,000	30,000	30,000	35,000	...	40,000
Debt Service	654,000	1,271,000	2,083,000	2,083,000	2,083,000	2,083,000	...	1,541,000
Operational Contingency	15,000	52,000	58,000	62,000	68,000	72,000	...	100,000
Capital Projects	418,000	550,000	655,000	621,000	543,000	520,000	...	500,000
Total Anticipated Expenditures	**$2,001,000**	**$2,986,000**	**$4,099,000**	**$4,173,000**	**$4,177,000**	**$4,242,000**	...	**$4,182,000**
Capital Reserves	$200,000	$300,000	$100,000	$200,000	$250,000	$300,000	...	$675,000
Debt Service Reserves	190,000	250,000	450,000	450,000	475,000	475,000	...	400,000
State Water Reserves	0	400,000	600,000	600,000	600,000	600,000	...	675,000
Combined Reserves Carryover	*0*	*(390,000)*	*(950,000)*	*(1,150,000)*	*(1,250,000)*	*(1,325,000)*	...	*(1,500,000)*
Additional Reserves Required	390,000	560,000	200,000	*(100,000)*	75,000	50,000	...	250,000
REVENUE REQUIRED	**$2,391,000**	**$3,546,000**	**$4,299,000**	**$4,273,000**	**$4,252,000**	**$4,292,000**	...	**$4,432,000**
Water Usage (Low End Projection)	1350 A.F.	1350 A.F.	1400 A.F.	1450 A.F.	1500 A.F.	1550 A.F.	...	1900 A.F.
	$4.06/unit	$6.03/unit	$7.04/unit	$6.77/unit	$6.50/unit	$6.36/unit	...	$5.36/unit

WTB/LC:C:BUDGEST [EXCEL]

ARROYO GRANDE

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 17,395 (CA Dept. of Finance 1/1/2013)

Number of Services: 6,292

Water Rates (eff. July 1, 2013):

Bi-Monthly Water Service Charges per 100 CF:
(based on 5/8" meter)

	Inside City	Outside City
Minimum Charge:	$11.50	$14.38
First 12 units/bi-month	$3.37	$4.21
Next 20 units/bi-month	$3.74	$4.68
Next 32 units/bi-month	$4.23	$5.29
Over 64 units/bi-month	$5.12	$6.40
Lopez Charge:	$40.66	$50.82

New Account Fee:	$15.00	
Renter Deposit:	$180.00	can be paid in two $90.00 payments. Owner can waive deposit if owner is responsible for closing bill.
Returned Check Charge:	$25.00	
Delinquent Charge:	10%	after 30 days
Late Charge:	$30.00	after 45 days (if shut off)
New Meter Charges:	$207.00	for 5/8" meter
	$997.00	Distribution Fee
	$2,150.00	Water Availability
Retrofit Requirements:	None	

ATASCADERO

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 32,660

Number of Services: 10,609

Water Rates (eff. April 18, 2012):

Monthly Water Service Charges:

Minimum Charge: $18.00 (includes 2,000 gals.)

3,000 to 12,000 gals.:	$2.10 per 1,000 gals.
13,000 to 25,000 gals.:	$3.25 per 1,000 gals.
26,000 to 50,000 gals.:	$4.80 per 1,000 gals.
51,000 to 75,000 gals.:	$5.50 per 1,000 gals.
76,000 gals. and up:	$6.00 per 1,000 gals.*

Homes in surcharge area pay an additional 15%

Nacimiento Water Surcharge $2.50 per month**

**Applies only to non-single family residences*
***Per meter except standby accounts*

New Account Fee:	None	
Renter Deposit:	None	owners are responsible for account
Returned Check Charge:	$20.00	
Delinquent Charge:	$50.00	(if shut off)
	$100.00	(after-hours turn-on if shut off for non-payment)
Late Charge:	$5.00	after 30 days
New Meter Charges:		
(3/4" meter)	$1,670.00	Installation Fee (if installed by AMWC)
	$19,600.00	Connection Fee

CAMBRIA

RESIDENTIAL WATER RATES
JULY 2013
(Prepared by Atascadero Mutual Water Company)

Population Served: 6,500

Number of Services: 4,014

Water Rates (eff. July 1, 2009):

Bi-Monthly Water Service Charges:
Bi-monthly residential rates per 100 CF Unit:

0–6 units	$23.82	16 units	$84.45
7 units	$29.87	17 units	$90.63
8 units	$35.92	18 units	$96.81
9 units	$41.97	19 units	$102.99
10 units	$48.02	20 units	$109.17
11 units	$54.07	25 units	$140.67
12 units	$60.12	30 units	$172.17
13 units	$66.17	35 units	$204.37
14 units	$72.22	40 units	$236.57
15 units	$78.27	45 units	$271.32 and so on

New Account Fee:	$ 38.50	
Renter Deposit:	$100.00	
Returned Check Charge:	$25.00	
Delinquent Charge:	$29.50	48-hr. notice fee
Late Charge:	10%	of delinquent amount with a min. of $10.00 after 30 days
New Meter Charge:	$3,255.00 $ 2,170.00	water connection plus sewer connection fee applicable retrofit fee

Retrofit Requirements:	Assuming 2-bath home being built
0 – 4,000 sf parcel	$5,000 (or 100 points)
4,001 – 8,000 sf parcel	$6,250 (or 125 points)
8,001 – 16,000 sf parcel	$7,500 (or 150 points)

* Points calculated based on fixture retrofit values

GROVER BEACH

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 13,211 (CA Dept. of Finance 1/1/2013)

Number of Services: 4,690

Water Rates (eff. April 1, 2012):

Bi-Monthly Water Service Charges per 100 CF Unit:
(plus 1% utility users tax)

Minimum Monthly Charge for 5/8" & 3/4" meter:	$9.82/mo.
First 12 units	$3.26
Next 8 units	$3.44
Next 22 units	$3.95
Over 42 units	$4.38

New Account Fee:	$88.00	
Tenant Deposit:	$215.00	
Returned Check Charge:	$25.00	
Delinquent Charge:	$73.00 $266.00	(business hours) (after-hours turn-on)
Late Charge:	10%	or $10.00
Door Hanger Fee:	$20.00	
New Meter Charges: (1" meter)	$427.00	plus 25%
Retrofit Requirements:	$2,775.00	permit fee – goes into fund to retrofit existing homes

HERITAGE RANCH

RESIDENTIAL WATER RATES
July 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 3,500

Number of Services: 1,760

Water Rates effective July 1, 2013:

Monthly Water Service Charges:

Fixed meter fee for a 5/8" x 3/4" water service = $20.41
(1 Unit = 100 cubic feet or 748 gallons)

0-2 units:	Included in fixed meter fee (base rate)
3-21 units	$2.80 per unit
22 units and up:	$3.46 per unit

New Account/Transfer Fee:	$ 25.00
Renter Deposit:	Accounts must be held by property owner. No deposit required.
Returned Check Charge:	$ 20.00 – 1st returned check $ 35.00 – 2nd returned check $ 35.00 – 3rd returned check $ 40.00 – each subsequent returned check
Delinquent Charge:	$ 40.00 during normal business hours (if shut off) $120.00 if shut off after hours
Late Charge:	10% of account balance after 30 days
New Meter Charges: (5/8" meter)	$500.00 Installation $1,456.00 Connection Fee

MORRO BAY

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 10,317 (CA Dept. of Finance 1/1/2013)

Number of Services: 5,400 (approx)

Water Rates (eff. July 1, 1995):

Monthly Water Service Charges per 100 CF Unit:

0-3 units	$16.43	12 units	$67.55	21 units	$121.17
4 units	$21.99	13 units	$73.38	22 units	$127.39
5 units	$27.58	14 units	$79.24	23 units	$133.70
6 units	$33.20	15 units	$85.13	24 units	$140.07
7 units	$38.85	16 units	$91.06	25 units	$146.54
8 units	$44.53	17 units	$97.01	26 units	$153.09
9 units	$50.24	18 units	$102.99	27 units	$159.70
10 units	$55.98	19 units	$109.00	28 units	$166.37
11 units	$61.75	20 units	$115.04	etc.	

NOTE: Water rates unchanged since 1995

New Account Fee:		$25.00	application fee
Renter Deposit:		$100.00	
Returned Check Charge:		$ 25.00 $ 35.00	for first, for all others
Delinquent Charges:		$ 53.00 $ 45.00	posting fee reconnect fee
Late Charge:		10%	after 30 days
New Meter Charges:	1" – 1-1/2" 3/4" – 5/8"	$1,771.00 $1,320.00	 (purchase, install, and tie-in to line)

NIPOMO

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

	Town Div.	
Population Served:	10,867	
Number of Services:	4,187	
Water Rates (eff. November 1, 2011):		
Bi-Monthly water service charges:		
Flat Rate for 1" meter or less	$ 35.72	
0 – 24 units	$ 1.80	
25 – 40 units	$ 2.25	
41 – 100 units	$ 3.15	
Greater than 100 units	$ 5.40	
New Account Fee:	$ 10.00	
Renter Deposit:	None	owners ultimately responsible
Returned Check Charge:	$ 15.00	
Delinquent Charge:	$ 50.00	
Late Charge:	$ 5.00	or 10%, whichever is less
New Meter Charge:	$ 275.00	(5/8" meter)
Retrofit Requirements:	SLO County requirement: toilet (1.2 gpf) & showerhead (2.5 gpm) at the time of sale or transfer of title to another entity.	

PASO ROBLES

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 30,504 (CA Dept. of Finance 1/1/2013)

Number of Services: 10,664

Water Rates (eff. January 1, 2013):

Monthly Water Service Charges:		
Rate per unit (per 100 CF):	$3.20	
New Account Fee:	$42.00	
Renter Deposit:	$91.00	
Returned Check Charge:	$21.00	
Delinquent Charge:	10%	
Door Hanger Fee:	$32.00	
No Payment Fee:	$91.00	
Late Charge:	10%	Applied on the 5th of each month
Other Charges (after-hours):	$357.00	
New Meter Charges:	$179.00	Install meter only (3/4")
	$206.00	Meter and meter box
	(Fee based on labor)	Tie into water main
	$17,750.00	Connection Fee (3/4")
Retrofit Requirements:	None	

PISMO BEACH

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 8573

Number of Services: 4,809

Water Rates (eff. June 1, 2012):

Bi-Monthly Water Service Charges:

Meter Charge for 5/8":	$32.57	
Charges for water usage:		
0 - 1,200 CF:	$2.35	per 100 CF
1,200 + CF:	$3.05	per 100 CF
New Account Fee:	$45.00	
Renter Deposit:	$180.00	owners are not responsible for account balance
First Returned Check Charge:	$25.00	
Subsequent Returned Check Charge:	$35.00	
Delinquent Charge:	$30.00	(meter locked off)
Other Charges:	$166.00	per year special tax per EDU for fixed costs for State and County (Lopez) water, included in yearly tax bill
New Meter Charges: (3/4")	$270.00	for installation (owner provides connection and meter box)
	$7,603.00	State Water Fee paid on building application
Retrofit Requirements:	None	

SAN LUIS OBISPO

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 45,541 (CA Dept. of Finance 1/1/2013)

Number of Services: 14,500

Water Rates (eff. July 1, 2013):

Monthly Water Service Charges Per 100 CF Unit:
(plus 5% utility users tax)

	Inside City	Outside City
Base Fee	$5.00	$10.00
1-8	$6.56	$13.12
9+	$8.19	$16.38

Account Set-up Fee:	$ 60.00 $255.00	during business hours after hours/weekends
Deposit Required:	$ 90.00	if customer refuses to furnish Social Security #; otherwise, no deposit required
Returned Check Charge:	$ 25.00	
Delinquent Charge:	$ 97.00	restoration fee plus $90.00 refundable deposit
Late Charge:	$15.00 or 1.5%	of outstanding balance, whichever is greater, after 30 days
New Meter Charge:	$ 82.00	install (owner provides connection and meter box)
Water Impact Fee:	$17,383.00	SFR Rate
Retrofit Requirements:	None	

SANTA MARGARITA

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 1,259

Number of Services: 539

Water Rates (eff. July 1, 2013):

Bi-Monthly Water Service Charges:
(CCF = 100 cubic feet or 748 gallons)

0-10 CCF:	$59.26 (minimum charge)
11 – 16 CCF:	$2.83 per unit
Greater than 16 CCF and up:	$3.62 per unit

New Account/Transfer Fee:	None
Renter Deposit:	$40.00
Returned Check Charge:	$35.00
Reconnection of Water Service Charge:	$60.00
Late Charge:	$20.00
New Meter Charges: (5/8" meter)	$1,500.00 Water Service Connection $350.00 Water Service Meter

TEMPLETON

RESIDENTIAL WATER RATES
JULY 2013

(Prepared by Atascadero Mutual Water Company)

Population Served: 7,000

Number of Services: 2,650

Water Rates (eff. January 1, 2013):

Monthly water service charges:

Minimum Monthly charge (5/8" meter): $16.10
(includes up to 300 CF)

301 – 2,000:	$1.90/100 cu. ft.
2,001 – 4,000:	$2.55/100 cu. ft.
4,001 – 8,000:	$3.30/100 cu. ft.
8,001 +:	$4.30/100 cu. ft.

Water service outside TCSD boundaries is at 120% of rates above.

New Account Fee:	$10.00	
Renter Deposit:	None	owner ultimately responsible
Returned Check Charge:	$30.00	(can be waived)
Reconnection Charge:	$50.00	(can be waived)
Late Charge:	10%	penalty after 20 days, plus 0.5% interest after 30 days
New Meter Charge:	$24,478.00	

CITY OF MORRO BAY

2010/11 ADOPTED ANNUAL BUDGET

WATER ACCUMULATION FUND

	2004/05 Actual	2005/06 Actual	2006/07 Actual	2007/08 Actual	2008/09 Actual	2009/10 Amended Budget	2010/11 Adopted Budget
Beginning cash balance	$ 4,462,804	$ 4,604,919	$ 4,726,652	$ 4,838,700	$ 6,306,130	$ 5,166,472	$ 4,163,683
Revenues from:							
Impact fees	12,005	27,608	11,014	2,461	7,076	-	-
Interest income	64,637	94,125	189,119	299,987	156,771	50,000	50,000
Other income	-	-	-	-	1,537	-	-
Subtotal	76,642	121,733	200,133	302,448	165,384	50,000	50,000
Transfers in from operating fund	442,803	-	14,310	-	111,121	-	-
Total revenues and transfers in	519,445	121,733	214,443	302,448	276,505	50,000	50,000
Capital improvements	(377,330)	-	(102,395)	1,164,982	(1,288,628)	(100,000)	-
Transfer out to operating fund	-	-	-	-	(127,535)	(952,789)	(299,391)
Ending cash balance	$ 4,604,919	$ 4,726,652	$ 4,838,700	$ 6,306,130	$ 5,166,472	$ 4,163,683	$ 3,914,292

CITY OF MORRO BAY

2011/12 ADOPTED ANNUAL BUDGET

WATER RESERVE FUND

	2007/08 Actual	2008/09 Actual	2009/10 Actual	2010/11 Amended Budget	2011/12 Adopted Budget
Beginning cash balance	$ 4,838,700	$ 6,306,130	$ 5,166,472	$ 4,984,596	$ 4,735,205
Revenues from:					
Impact fees	2,461	7,076	10,315	-	-
Interest income	299,987	156,771	85,426	50,000	15,000
Other income	-	1,537	534	-	-
Subtotal	302,448	165,384	96,275	50,000	15,000
Transfers in from operating fund	-	111,121	-	-	-
Total revenues and transfers in	302,448	276,505	96,275	50,000	15,000
Capital improvements	1,164,982	(1,288,628)	(278,151)	-	(750,000)
Transfer out to operating fund	-	(127,535)	-	(299,391)	(1,163,468)
Ending cash balance	$ 6,306,130	$ 5,166,472	$ 4,984,596	$ 4,735,205	$ 2,836,737

CITY OF MORRO BAY

2012/13 ADOPTED ANNUAL BUDGET

WATER RESERVE FUND

	2008/09 Actual	2009/10 Actual	Audited 2010/11 Actual	2011/12 Amended Budget	2012/13 Adopted Budget
Beginning cash balance	$ 6,306,130	$ 5,166,472	$ 4,984,596	$ 4,842,676	$ 2,944,208
Revenues from:					
Impact fees	7,076	10,315	16,566	-	-
Interest income	156,771	85,426	44,964	15,000	15,000
Other income	1,537	534	546	-	-
Subtotal	165,384	96,275	62,076	15,000	15,000
Transfers in from operating fund	111,121	-	-	-	-
Total revenues and transfers in	276,505	96,275	62,076	15,000	15,000
Capital Improvements	(1,288,628)	(278,151)	-	(750,000)	-
Transfer out to operating fund	(127,535)	-	(203,996)	(1,163,468)	(928,896)
Total expenses	(1,416,163)	(278,151)	(203,996)	(1,913,468)	(928,896)
Revenues over(under) expenditures	(1,139,658)	(181,876)	(141,920)	(1,898,468)	(913,896)
Ending cash balance	$ 5,166,472	$ 4,984,596	$ 4,842,676	$ 2,944,208	$ 2,030,312

CITY OF MORRO BAY

2013/14 ADOPTED ANNUAL BUDGET

WATER RESERVE FUND

	2009/10 Actual	2010/11 Actual	2011/12 Actual	2012/13 Amended Budget	2013/14 Adopted Budget
Beginning cash balance	$ 5,166,472	$ 4,984,596	$ 4,842,676	$ 4,350,747	$ 3,436,851
Revenues from:					
Impact fees	10,315	16,566	6,920	-	-
Interest income	85,426	44,964	40,977	15,000	10,000
Other income	534	546	218	-	-
Subtotal	96,275	62,076	48,115	15,000	10,000
Transfers in from operating fund	-	-	135,864	-	-
Total revenues and transfers in	96,275	62,076	183,979	15,000	10,000
Capital improvements	(278,151)	-	-	-	(1,850,000)
Transfer out to operating fund	-	(203,996)	(675,908)	(928,896)	(250,755)
Total expenses	(278,151)	(203,996)	(675,908)	(928,896)	(2,100,755)
Revenues over(under) expenditures	(181,876)	(141,920)	(491,929)	(913,896)	(2,090,755)
Ending cash balance	$ 4,984,596	$ 4,842,676	$ 4,350,747	$ 3,436,851	$ 1,346,096

CITY OF MORRO BAY

2010/11 ADOPTED ANNUAL BUDGET

WATER REVENUE FUND

	2004/05 Actual	2005/06 Actual	2006/07 Actual	2007/08 Actual	2008/09 Actual	2009/10 Amended Budget	2010/11 Adopted Budget
Beginning cash balance	$ 2,819,512	$ 2,205,399	$ 2,474,363	$ 631,029	$ (158,147)	$ 786,088	$ 786,088
Revenues from:							
Water sales	3,675,746	3,671,259	3,711,493	3,701,091	3,588,500	3,300,000	3,300,000
Service fees	58,961	104,491	91,919	83,297	129,144	39,700	67,000
Investment earnings	66,502	57,567	39,275	15,672	-	-	-
Other revenues	35,706	41,896	53,734	53,243	4,242	33,400	-
Subtotal	3,836,915	3,875,213	3,896,421	3,853,303	3,721,886	3,373,100	3,367,000
Transfers in from:							
Accumulation fund	-	-	-	-	127,535	952,789	299,391
Other	-	-	-	4,355	1,611,718	-	-
Total revenues and transfers in	3,836,915	3,875,213	3,896,421	3,857,658	5,461,139	4,325,889	3,666,391
Expenses for:							
Personnel	(498,897)	(653,335)	(633,342)	(630,708)	(653,711)	(718,084)	(733,810)
Supplies	(119,826)	(110,893)	(210,613)	(161,783)	(146,245)	(213,000)	(160,000)
Services	(2,314,931)	(1,798,090)	(2,125,578)	(2,267,215)	(2,399,436)	(2,534,015)	(2,504,606)
Other	(247,336)	(262,172)	(246,965)	(636,417)	(777,449)	(570,000)	-
Subtotal	(3,180,990)	(2,824,490)	(3,216,498)	(3,696,123)	(3,976,841)	(4,035,099)	(3,398,416)
Transfers out to:							
General fund for cost allocation	(253,323)	(256,323)	(256,323)	(261,160)	(428,942)	(290,790)	(267,975)
Equipment replacement fund	-	(23,236)	-	-	-	-	-
Capital improvement fund	(1,016,715)	(11,618)	(2,266,934)	(689,551)	-	-	-
Accumulation fund	-	(490,582)	-	-	(111,121)	-	-
Subtotal	(1,270,038)	(781,759)	(2,523,257)	(950,711)	(540,063)	(290,790)	(267,975)
Total expenses and transfers out	(4,451,028)	(3,606,249)	(5,739,755)	(4,646,834)	(4,516,904)	(4,325,889)	(3,666,391)
Revenues over(under) expenses and transfers out	(614,113)	268,964	(1,843,334)	(789,176)	944,235	-	-
Ending cash balance	$ 2,205,399	$ 2,474,363	$ 631,029	$ (158,147)	$ 786,088	$ 786,088	$ 786,088

CITY OF MORRO BAY

2011/12 ADOPTED ANNUAL BUDGET

WATER REVENUE FUND

	2007/08 Actual	2008/09 Actual	2009/10 Actual	2010/11 Amended Budget	2011/12 Adopted Budget
Beginning cash balance	$ 689,551	$ 64,347	$ 76,105	$ (340,834)	$ (340,834)
Revenues from:					
Water sales	3,701,091	3,588,500	3,451,279	3,300,000	3,300,000
Service fees	125,999	129,144	111,950	67,000	68,000
Investment earnings	15,672	-	-	-	-
Other revenues	10,541	4,242	791	-	20,000
Subtotal	3,853,303	3,721,886	3,564,020	3,367,000	3,388,000
Transfers in from:					
Reserve fund	-	127,535	-	299,391	1,913,468
Other	-	1,611,718	54,612	-	-
Subtotal	-	1,739,253	54,612	299,391	1,913,468
Total revenues and transfers in	3,853,303	5,461,139	3,618,632	3,666,391	5,301,468
Expenses for:					
Personnel	(630,708)	(653,711)	(728,891)	(733,810)	(877,800)
Supplies	(93,702)	(146,244)	(255,591)	(160,000)	(190,000)
Services	(2,335,296)	(2,399,437)	(2,533,363)	(2,504,606)	(2,861,646)
Other - no depreciation	(468,090)	(176,164)	(299,612)	-	(10,000)
Subtotal	(3,527,796)	(3,375,556)	(3,817,457)	(3,398,416)	(3,939,446)
Transfers out to:					
General fund for cost allocation	(261,160)	(428,942)	-	(267,975)	(271,188)
Equipment replacement fund	-	-	-	-	-
Capital improvement fund	(689,551)	(1,533,762)	(218,114)	-	(750,000)
Reserve fund	-	(111,121)	-	-	-
Subtotal	(950,711)	(2,073,825)	(218,114)	(267,975)	(1,021,188)
Total expenses and transfers out	(4,478,507)	(5,449,381)	(4,035,571)	(3,666,391)	(4,960,634)
Revenues over(under) expenses and transfers out	(625,204)	11,758	(416,939)	-	340,834
Ending cash balance	$ 64,347	$ 76,105	$ (340,834)	$ (340,834)	$ -

NOTES:

Resolution No. 48-08, adopted on August 11, 2008, authorizes the annual transfer of excess cash to the reserve fund.

CITY OF MORRO BAY

2012/13 ADOPTED ANNUAL BUDGET

WATER REVENUE FUND

	2008/09 Actual	2009/10 Actual	Audited 2010/11 Actual	2011/12 Amended Budget	2012/13 Adopted Budget
Beginning cash balance	$ 64,347	$ 76,105	$ (340,834)	$ (629,196)	$ (288,362)
Revenues from:					
Water sales	3,588,500	3,451,279	3,323,916	3,300,000	3,400,000
Service fees	129,144	111,950	103,643	68,000	62,500
Other revenues	4,242	791	5,135	20,000	-
Subtotal	3,721,886	3,564,020	3,432,694	3,388,000	3,462,500
Transfers in from:					
Reserve fund	127,535	-	222,327	1,913,468	928,896
Other	1,611,718	54,612	342	-	-
Subtotal	1,739,253	54,612	222,669	1,913,468	928,896
Total revenues and transfers in	5,461,139	3,618,632	3,655,363	5,301,468	4,391,396
Expenses for:					
Personnel	(653,711)	(728,891)	(755,617)	(877,800)	(990,600)
Supplies	(146,244)	(255,591)	(228,166)	(190,000)	(170,000)
Services	(2,399,437)	(2,533,363)	(2,586,033)	(2,861,646)	(2,656,246)
Other (no depreciation)	(176,164)	(299,612)	(105,934)	(10,000)	(15,000)
Subtotal	(3,375,556)	(3,817,457)	(3,675,750)	(3,939,446)	(3,831,846)
Transfers out to:					
General fund for cost allocation	(428,942)	-	(267,975)	(271,188)	(271,188)
Equipment replacement fund	-	-	-	-	-
Capital improvement fund	(1,533,762)	(218,114)	-	(750,000)	-
Reserve fund	(111,121)	-	-	-	-
Subtotal	(2,073,825)	(218,114)	(267,975)	(1,021,188)	(271,188)
Total expenses and transfers out	(5,449,381)	(4,035,571)	(3,943,725)	(4,960,634)	(4,103,034)
Revenues over(under) expenses and transfers out	11,758	(416,939)	(288,362)	340,834	288,362
Ending cash balance	$ 76,105	$ (340,834)	$ (629,196)	$ (288,362)	$ -

NOTES:

Resolution No. 48-08, adopted on August 11, 2008, authorizes the annual transfer of excess cash to the reserve fund.

CITY OF MORRO BAY

2013/14 ADOPTED ANNUAL BUDGET

WATER REVENUE FUND

	2009/10 Actual	2010/11 Actual	2011/12 Actual	2012/13 Amended Budget	2013/14 Adopted Budget
Beginning cash balance	$ (38,519)	$ (455,458)	$ 375,192	$ (114)	$ 288,248
Revenues from:					
Water sales	3,451,279	3,323,916	3,325,454	3,400,000	3,400,000
Service fees	111,950	103,643	100,040	62,500	65,000
Other revenues	791	5,135	1,552	-	-
Subtotal	3,564,020	3,432,694	3,427,046	3,462,500	3,465,000
Transfers in from:					
Reserve fund	-	222,327	662,808	928,896	250,755
Other	54,612	342	14,408	-	-
Subtotal	54,612	222,669	677,216	928,896	250,755
Total revenues and transfers in	3,618,632	3,655,363	4,104,262	4,391,396	3,715,755
Expenses for:					
Personnel	(728,891)	(755,617)	(782,729)	(990,600)	(917,839)
Supplies	(255,591)	(228,166)	(182,847)	(170,000)	(126,750)
Services	(2,533,363)	(1,467,021)	(3,208,479)	(2,656,246)	(2,683,073)
Other (no depreciation)	(299,612)	(105,934)	(34,325)	(15,000)	-
Subtotal	(3,817,457)	(2,556,738)	(4,208,380)	(3,831,846)	(3,727,662)
Transfers out to:					
General fund for cost allocation	-	(267,975)	(271,188)	(271,188)	(276,341)
Equipment replacement fund	-	-	-	-	-
Capital improvement fund	(218,114)	-	-	-	-
Reserve fund	-	-	-	-	-
Subtotal	(218,114)	(267,975)	(271,188)	(271,188)	(276,341)
Total expenses and transfers out	(4,035,571)	(2,824,713)	(4,479,568)	(4,103,034)	(4,004,003)
Revenues over(under) expenses and transfers out	(416,939)	830,650	(375,306)	288,362	(288,248)
Ending cash balance	$ (455,458)	$ 375,192	$ (114)	$ 288,248	$ -

NOTES:

Resolution No. 48-08, adopted on August 11, 2008, authorizes the annual transfer of excess cash to the reserve fund.

CITY OF MORRO BAY

2010/11 ADOPTED ANNUAL BUDGET

SEWER ACCUMULATION FUND

	2004/05 Actual	2005/06 Actual	2006/07 Actual	2007/08 Actual	2008/09 Actual	2009/10 Amended Budget	2010/11 Adopted Budget
Beginning cash balance	$ 1,820,465	$ 1,916,242	$ 1,862,146	$ 2,113,842	$ 2,652,349	$ 2,958,118	$ 1,993,326
Revenues from:							
Impact fees	84,424	147,530	90,334	26,541	34,471	-	-
Interest income	41,353	62,880	218,504	142,330	72,761	-	30,000
Subtotal	125,777	210,410	308,838	168,871	107,232	-	30,000
Transfers in from:							
Capital improvement	-	-	180,003	412,397	-	-	-
Revenue fund	-	-	-	241,071	773,534	-	347,509
Total revenues and transfers in	125,777	210,410	488,841	822,339	880,766	-	377,509
Capital improvements	(30,000)	-	(179,145)	(253,075)	(29,799)	(400,000)	-
Transfer out to:							
Sewer Equipment Replacement Fund	-	-	-	-	-	(15,000)	-
Sewer Revenue Fund	-	(264,506)	(58,000)	(30,757)	(545,198)	(549,792)	-
Total capital and transfers out	(30,000)	(264,506)	(237,145)	(283,832)	(574,997)	(964,792)	-
Revenues and transfers over(under) capital improvements and transfers out	95,777	(54,096)	251,696	538,507	305,769	(964,792)	377,509
Ending cash balance	$ 1,916,242	$ 1,862,146	$ 2,113,842	$ 2,652,349	$ 2,958,118	$ 1,993,326	$ 2,370,835

CITY OF MORRO BAY

2011/12 ADOPTED ANNUAL BUDGET

SEWER RESERVE FUND

	2007/08 Actual	2008/09 Actual	2009/10 Actual	2010/11 Amended Budget	2011/12 Adopted Budget
Beginning cash balance	$ 1,813,842	$ 2,352,349	$ 2,658,118	$ 2,978,205	$ 3,355,714
Revenues from:					
Impact fees	26,541	34,471	21,197	-	-
Interest income	142,330	72,761	66,248	30,000	10,000
Subtotal	168,871	107,232	87,445	30,000	10,000
Transfers in from:					
Capital improvement	412,397	-	389,349	-	-
Revenue fund	241,071	773,534	-	347,509	1,100,000
Subtotal	653,468	773,534	389,349	347,509	1,100,000
Total revenues and transfers in	822,339	880,766	476,794	377,509	1,110,000
Capital improvements	(253,075)	(29,799)	(156,707)	-	-
Transfer out to:					
Sewer Equipment Replacement Fund	-	-	-	-	-
Sewer Revenue Fund	(30,757)	(545,198)	-	-	-
Subtotal	(30,757)	(545,198)	-	-	-
Total capital and transfers out	(283,832)	(574,997)	(156,707)	-	-
Revenues and transfers over(under) capital improvements and transfers out	538,507	305,769	320,087	377,509	1,110,000
Ending cash balance	$ 2,352,349	$ 2,658,118	$ 2,978,205	$ 3,355,714	$ 4,465,714

CITY OF MORRO BAY

2012/13 ADOPTED ANNUAL BUDGET

SEWER RESERVE FUND

	2008/09 Actual	2009/10 Actual	Audited 2010/11 Actual	2011/12 Amended Budget	2012/13 Adopted Budget
Beginning cash balance	$ 2,352,349	$ 2,658,118	$ 2,978,205	$ 2,997,320	$ 4,107,320
Revenues from:					
Impact fees	34,471	21,197	32,563	-	-
Interest income	72,761	66,248	40,305	10,000	30,000
Subtotal	107,232	87,445	72,868	10,000	30,000
Transfers in from:					
Capital improvement	-	389,349	630	-	-
Revenue fund	773,534	-	-	1,100,000	1,794,657
Subtotal	773,534	389,349	630	1,100,000	1,794,657
Total revenues and transfers in	880,766	476,794	73,498	1,110,000	1,824,657
Capital improvements	(29,799)	(156,707)	-	-	-
Transfer out to:					
Sewer Equipment Replacement Fund	-	-	(53,708)	-	(25,000)
Sewer Revenue Fund	(545,198)	-	(675)	-	-
Subtotal	(545,198)	-	(54,383)	-	(25,000)
Total capital and transfers out	(574,997)	(156,707)	(54,383)	-	(25,000)
Revenues and transfers over(under) capital improvements and transfers out	305,769	320,087	19,115	1,110,000	1,799,657
Ending cash balance	$ 2,658,118	$ 2,978,205	$ 2,997,320	$ 4,107,320	$ 5,906,977

CITY OF MORRO BAY

2013/14 ADOPTED ANNUAL BUDGET

SEWER RESERVE FUND

	2009/10 Actual	2010/11 Actual	2011/12 Actual	2012/13 Amended Budget	2013/14 Adopted Budget
Beginning cash balance	$ 2,658,118	$ 2,978,205	$ 2,997,320	$ 3,885,574	$ 5,665,231
Revenues from:					
Impact fees	21,197	32,563	12,703	-	-
Interest income	66,248	40,305	33,523	30,000	20,000
Subtotal	87,445	72,868	46,226	30,000	20,000
Transfers in from:					
Capital improvement	389,349	630	-	-	-
Revenue fund	-	-	2,027,123	1,794,657	584,353
Subtotal	389,349	630	2,027,123	1,794,657	584,353
Total revenues and transfers in	476,794	73,498	2,073,349	1,824,657	604,353
Capital improvements	(156,707)	-	(1,185,095)	-	(1,110,000)
Transfer out to:					
Sewer Equipment Replacement Fund	-	(53,708)	-	(45,000)	(115,000)
Sewer Revenue Fund	-	(675)	-	-	-
Subtotal	-	(54,383)	-	(45,000)	(115,000)
Total capital and transfers out	(156,707)	(54,383)	(1,185,095)	(45,000)	(1,225,000)
Revenues and transfers over(under) capital improvements and transfers out	320,087	19,115	888,254	1,779,657	(620,647)
Ending cash balance	$ 2,978,205	$ 2,997,320	$ 3,885,574	$ 5,665,231	$ 5,044,584

CITY OF MORRO BAY

2010/11 ADOPTED ANNUAL BUDGET

SEWER REVENUE FUND

	2004/05 Actual	2005/06 Actual	2006/07 Actual	2007/08 Actual	2008/09 Actual	2009/10 Amended Budget	2010/11 Adopted Budget
Beginning cash balance	$ (186,477)	$ (156,680)	$ 206,109	$ 466,730	$ (66,465)	$ (126,716)	$ 762,076
Revenues from:							
Sewer user fees	1,361,839	1,457,052	1,447,950	2,023,289	3,091,638	2,750,000	2,853,000
Intergovernmental	-	-	-	-	66,721	-	-
Investment earnings	20,238	34,214	19,000	2,384	19,132	-	18,000
Other revenues	3,595	7,820	(1,000)	-	22,283	19,250	-
Subtotal	1,385,672	1,499,086	1,465,950	2,025,673	3,199,774	2,769,250	2,871,000
Transfers in from:							
Accumulation fund	-	264,506	458,464	30,737	-	549,792	-
Other	-	-	-	4,470	545,198	-	-
Total revenues and transfers in	1,385,672	1,763,592	1,924,414	2,060,880	3,744,972	3,319,042	2,871,000
Expenses for:							
Personnel	(141,199)	(131,147)	(263,697)	(343,824)	(386,628)	(582,648)	(638,000)
Supplies	(7,266)	(8,474)	(18,700)	(27,946)	(90,622)	(145,000)	(108,000)
Services	(11,101)	(2,436)	(54,845)	(155,353)	(271,600)	(276,646)	(283,396)
MB/CSD Wastewater Treatment Plant	(1,026,299)	(1,074,828)	(1,156,541)	(1,654,871)	(1,502,500)	(1,225,855)	(1,334,380)
Subtotal	(1,185,865)	(1,216,885)	(1,493,783)	(2,181,994)	(2,251,350)	(2,230,149)	(2,363,776)
Transfers out to:							
General fund for cost allocation	(170,010)	(170,010)	(170,010)	(170,010)	(177,233)	(200,101)	(159,715)
Capital improvement	-	-	-	(181,132)	(543,106)	-	-
Equipment replacement fund	-	(13,908)	-	-	(60,000)	-	-
Accumulation fund	-	-	-	(60,939)	(773,534)	-	(347,509)
Subtotal	(170,010)	(183,918)	(170,010)	(412,081)	(1,553,873)	(200,101)	(507,224)
Total expenses and transfers out	(1,355,875)	(1,400,803)	(1,663,793)	(2,594,075)	(3,805,223)	(2,430,250)	(2,871,000)
Revenues over(under) expenses and transfers out	29,797	362,789	260,621	(533,195)	(60,251)	888,792	-
Ending cash balance	$ (156,680)	$ 206,109	$ 466,730	$ (66,465)	$ (126,716)	$ 762,076	$ 762,076

CITY OF MORRO BAY

2011/12 ADOPTED ANNUAL BUDGET

SEWER REVENUE FUND

	2007/08 Actual	2008/09 Actual	2009/10 Actual	2010/11 Amended Budget	2011/12 Adopted Budget
Beginning cash balance	$ 466,730	$ 232,709	$ 590,827	$ 1,279,756	$ 1,279,756
Revenues from:					
Sewer user fees	2,002,547	3,110,842	3,296,452	2,853,000	3,317,000
Intergovernmental	-	-	143,193	-	-
Investment earnings	21,066	19,132	19,582	18,000	19,000
Other revenues	2,060	2,517	2,528	-	-
Subtotal	2,025,673	3,132,491	3,461,755	2,871,000	3,336,000
Transfers in from:					
Reserve fund	33,188	-	58,348	-	-
Other	2,019	545,198	-	-	-
Subtotal	35,207	545,198	58,348	-	-
Total revenues and transfers in	2,060,880	3,677,689	3,520,103	2,871,000	3,336,000
Expenses for:					
Personnel	(344,044)	(386,628)	(452,449)	(638,000)	(777,800)
Supplies	(60,634)	(86,677)	(103,511)	(108,000)	(100,000)
Services	(220,856)	(237,502)	(288,626)	(283,396)	(539,384)
Other (no depreciation)	(32,431)	(49,664)	(271,073)	-	(8,000)
Capital improvement	(180,132)	-	-	-	(250,000)
MB/CSD Wastewater Treatment Plant	(1,225,855)	(1,546,314)	(1,568,081)	(1,334,380)	(1,395,745)
Subtotal	(2,063,952)	(2,306,785)	(2,683,740)	(2,363,776)	(3,070,929)
Transfers out to:					
General fund for cost allocation	(170,010)	(177,233)	(147,434)	(159,715)	(161,630)
Equipment replacement fund	-	(60,000)	-	-	-
Reserve fund	(60,939)	(775,553)	-	(347,509)	(1,100,000)
Subtotal	(230,949)	(1,012,786)	(147,434)	(507,224)	(1,261,630)
Total expenses and transfers out	(2,294,901)	(3,319,571)	(2,831,174)	(2,871,000)	(4,332,559)
Revenues over(under) expenses and transfers out	(234,021)	358,118	688,929	-	(996,559)
Ending cash balance	$ 232,709	$ 590,827	$ 1,279,756	$ 1,279,756	$ 283,197

NOTES:

Resolution No. 48-08, adopted on August 11, 2008, authorizes the annual transfer of excess cash to the reserve fund.

With the 2011/12 fiscal year, excess cash, approximately $1,100,000, will transfer to the Sewer Reserve Fund.

CITY OF MORRO BAY

2012/13 ADOPTED ANNUAL BUDGET

SEWER REVENUE FUND

	2008/09 Actual	2009/10 Actual	Audited 2010/11 Actual	2011/12 Amended Budget	2012/13 Adopted Budget
Beginning cash balance	$ 232,709	$ 590,827	$ 1,279,756	$ 2,055,392	$ 1,058,833
Revenues from:					
Sewer user fees	3,110,842	3,296,452	3,445,189	3,317,000	3,517,000
Intergovernmental	-	143,193	214,930	-	-
Rental income	19,132	19,582	19,582	19,000	19,000
Other revenues	2,517	2,528	30,283	-	-
Subtotal	3,132,491	3,461,755	3,709,984	3,336,000	3,536,000
Transfers in from:					
Reserve fund	-	58,348	54,321	-	-
Other	545,198	-	7	-	-
Subtotal	545,198	58,348	54,328	-	-
Total revenues and transfers in	3,677,689	3,520,103	3,764,312	3,336,000	3,536,000
Expenses for:					
Personnel	(386,628)	(452,449)	(515,655)	(777,800)	(634,288)
Supplies	(86,677)	(103,511)	(60,457)	(100,000)	(92,500)
Services	(237,502)	(288,626)	(307,088)	(539,384)	(437,134)
Other (no depreciation)	(49,664)	(271,073)	(21,004)	(8,000)	(10,000)
Capital improvement	-	-	-	(250,000)	-
MB/CSD Wastewater Treatment Plant	(1,546,314)	(1,568,081)	(1,924,757)	(1,395,745)	(1,464,624)
Subtotal	(2,306,785)	(2,683,740)	(2,828,961)	(3,070,929)	(2,638,546)
Transfers out to:					
General fund for cost allocation	(177,233)	(147,434)	(159,715)	(161,630)	(161,630)
Equipment replacement fund	(60,000)	-	-	-	-
Reserve fund	(775,553)	-	-	(1,100,000)	(1,794,657)
Subtotal	(1,012,786)	(147,434)	(159,715)	(1,261,630)	(1,956,287)
Total expenses and transfers out	(3,319,571)	(2,831,174)	(2,988,676)	(4,332,559)	(4,594,833)
Revenues over(under) expenses and transfers out	358,118	688,929	775,636	(996,559)	(1,058,833)
Ending cash balance	$ 590,827	$ 1,279,756	$ 2,055,392	$ 1,058,833	$ -

NOTES:

Resolution No. 48-08, adopted on August 11, 2008, authorizes the annual transfer of excess cash to the reserve fund.

With the 2011/12 fiscal year, excess cash, approximately $1,100,000, will transfer to the Sewer Reserve Fund.

CITY OF MORRO BAY

2013/14 ADOPTED ANNUAL BUDGET

SEWER REVENUE FUND

	2009/10 Actual	2010/11 Actual	2011/12 Actual	2012/13 Amended Budget	2013/14 Adopted Budget
Beginning cash balance	$ 590,827	$ 1,279,756	$ 2,055,392	$ 2,238,999	$ 1,180,166
Revenues from:					
Sewer user fees	3,296,452	3,445,189	3,610,534	3,517,000	3,675,000
Intergovernmental	143,193	214,930	24,688	-	-
Rental income	19,582	19,582	19,665	19,000	19,000
Other revenues	2,528	30,283	29,931	-	25,000
Subtotal	3,461,755	3,709,984	3,684,818	3,536,000	3,719,000
Transfers in from:					
Reserve fund	58,348	54,321	1,170,112	-	-
Other	-	7	-	-	-
Subtotal	58,348	54,328	1,170,112	-	-
Total revenues and transfers in	3,520,103	3,764,312	4,854,930	3,536,000	3,719,000
Expenses for:					
Personnel	(452,449)	(515,655)	(527,364)	(634,288)	(748,307)
Supplies	(103,511)	(60,457)	(54,824)	(92,500)	(91,500)
Services	(288,626)	(307,088)	(188,275)	(437,134)	(446,855)
Other (no depreciation)	(271,073)	(21,004)	(91,448)	(10,000)	-
MB/CSD Wastewater Treatment Plant	(1,568,081)	(1,924,757)	(1,853,768)	(1,464,624)	(2,863,450)
Subtotal	(2,683,740)	(2,828,961)	(2,715,679)	(2,638,546)	(4,150,112)
Transfers out to:					
General fund for cost allocation	(147,434)	(159,715)	(161,630)	(161,630)	(164,701)
Equipment replacement fund	-	-	-	-	-
Reserve fund	-	-	(1,794,014)	(1,794,657)	(584,353)
Subtotal	(147,434)	(159,715)	(1,955,644)	(1,956,287)	(749,054)
Total expenses and transfers out	(2,831,174)	(2,988,676)	(4,671,323)	(4,594,833)	(4,899,166)
Revenues over(under) expenses and transfers out	688,929	775,636	183,607	(1,058,833)	(1,180,166)
Ending cash balance	$ 1,279,756	$ 2,055,392	$ 2,238,999	$ 1,180,166	$ -

NOTES:

Resolution No. 48-08, adopted on August 11, 2008, authorizes the annual transfer of excess cash to the reserve fund.

With the 2011/12 fiscal year, excess cash, approximately $1,100,000, will transfer to the Sewer Reserve Fund.